

ContactsManager

# Installation and Configuration Guide

V 1.7



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## 1. CHANGELOG

| Revision   | Date       | Description                                                                   | Author                             |
|------------|------------|-------------------------------------------------------------------------------|------------------------------------|
| <b>1.0</b> | 12.06.2024 | Initial version                                                               | Sebastian Achorner                 |
| <b>1.1</b> | 25.06.2024 | Update of illustrations, addition of log files, SSL Certificate Configuration | Sebastian Achorner                 |
| <b>1.2</b> | 10.07.2024 | Addition Innovaphone configuration (7.1, 7.3, 7.4)                            | Valentin Gratt, Sebastian Achorner |
| <b>1.3</b> | 16.07.2024 | ODBC Connector Addition                                                       | Sebastian Achorner                 |
| <b>1.4</b> | 24.07.2024 | Updating illustrations                                                        | Sebastian Achorner                 |
| <b>1.5</b> | 12.09.2024 | Update of illustrations, extension of field mapping, authentication           | Sebastian Achorner                 |
| <b>1.6</b> | 19.11.2025 | Addition to the Dynamics365 Connector                                         | Sebastian Achorner                 |
| <b>1.7</b> | 23.01.2026 | Correction Link                                                               | Sebastian Achorner                 |



### 3. GENERAL INFORMATION

**Software Name:** ContactsManager

**Version:** 2.24.1.9

**Target group:** Administrators, IT managers

#### 3.1 System Requirements

**Operating System:**

| OS                                | Version        | Architecture | Lifecycle             |
|-----------------------------------|----------------|--------------|-----------------------|
| <b><u>Windows 10 Client</u></b>   | Version 1607+  | x64          | <u>Windows</u>        |
| <b><u>Windows 11</u></b>          | Version 22000+ | x64          | <u>Windows</u>        |
| <b><u>Windows Server</u></b>      | 2012+ (*)      | x64          | <u>Windows Server</u> |
| <b><u>Windows Server Core</u></b> | 2012+ (*)      | x64          | <u>Windows Server</u> |

\* Windows Server 2012 and Windows Server 2012 R2 are supported with Extended Security Updates installed.

**Hardware:** The system requirements for running Windows are sufficient to run ContactsManager.

## 4. INSTALLATION PROCESS

In the following sections, we will now discuss the installation of the ContactsManager.

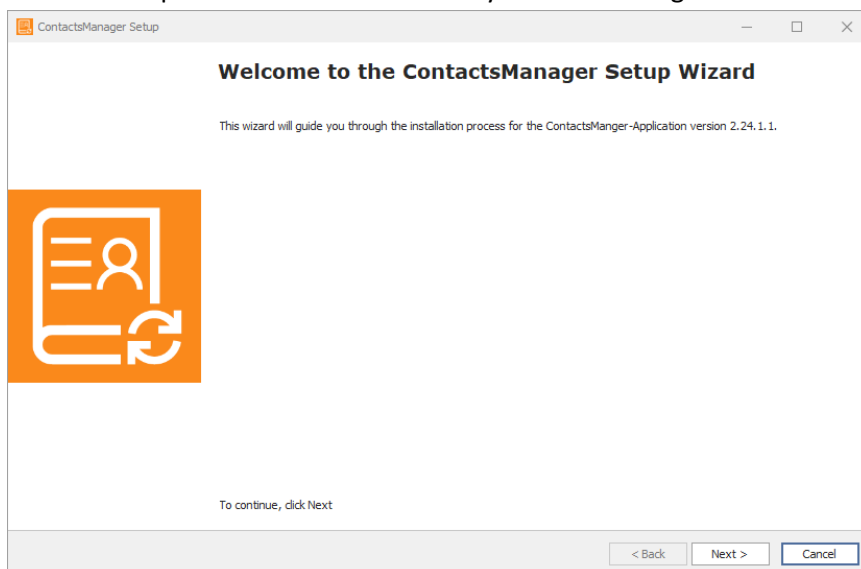
### 4.1 Installation files

The installation files for ContactsManager can be downloaded from the Innovaphone telephone system. To do this, you need to activate the ContactsManager application in the Innovaphone telephone system and download the Setup.exe in its configuration, which also contains the necessary access data for the further installation process.

### 4.2 Installation Guide

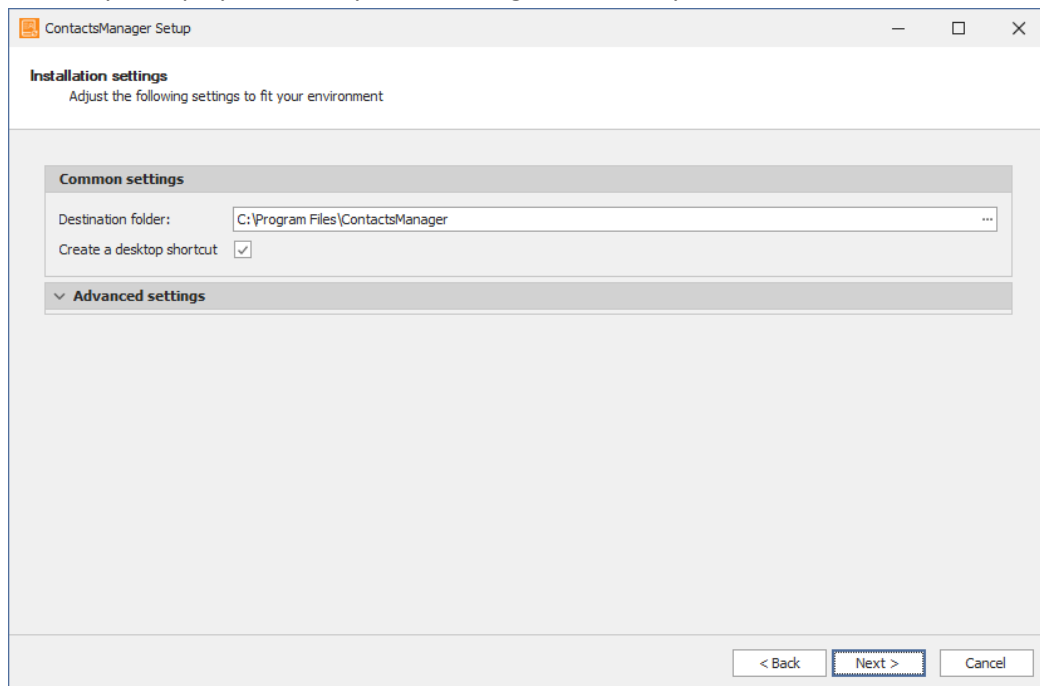
To run the installation file:

- Download the Setup.exe from the Innovaphone telephone system.
- Run the Setup.exe as an administrator by double-clicking.



Selection of the installation directory:

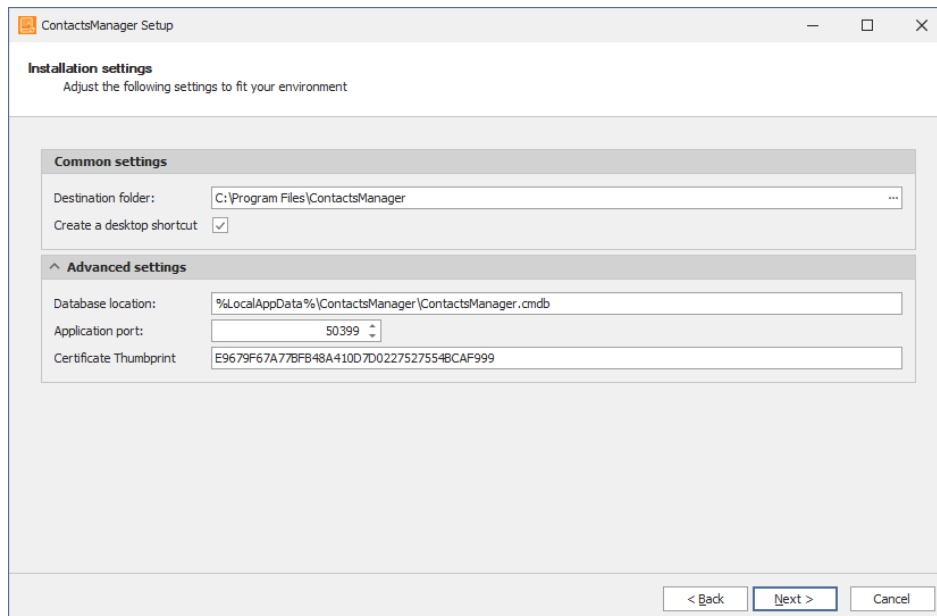
- Select the desired installation directory for ContactsManager. By default, a suggested directory is displayed, which you can change if necessary.



SSL certificate thumbprint/port/database path (optional):

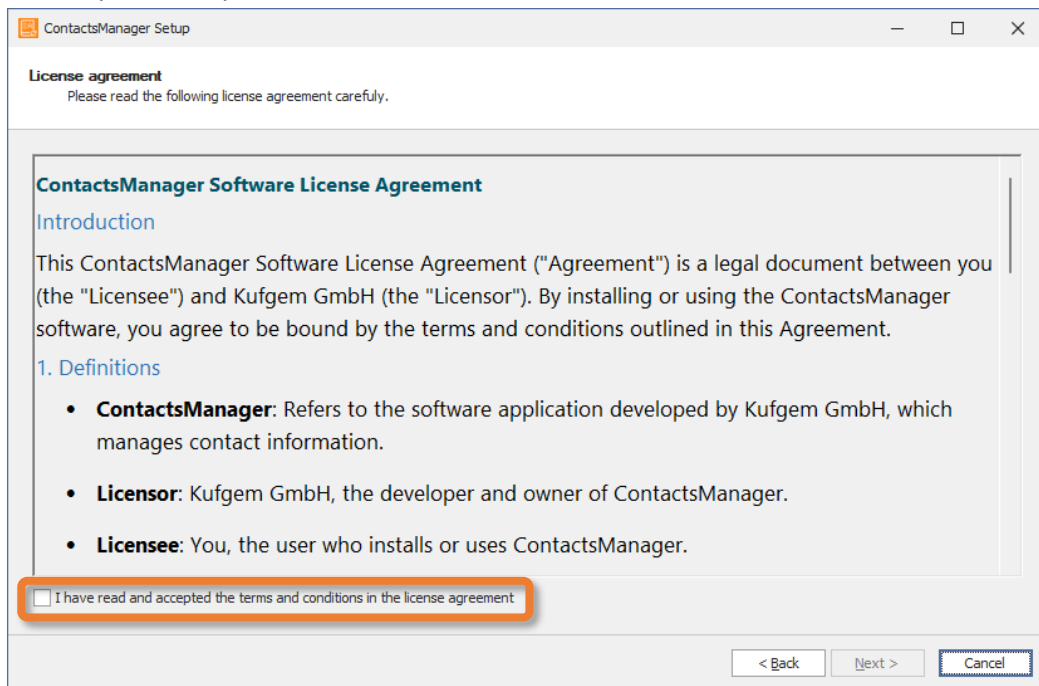
- If desired, you can enter an SSL certificate thumbprint, define the port used, or the location of the database.

This step is optional and can be skipped.



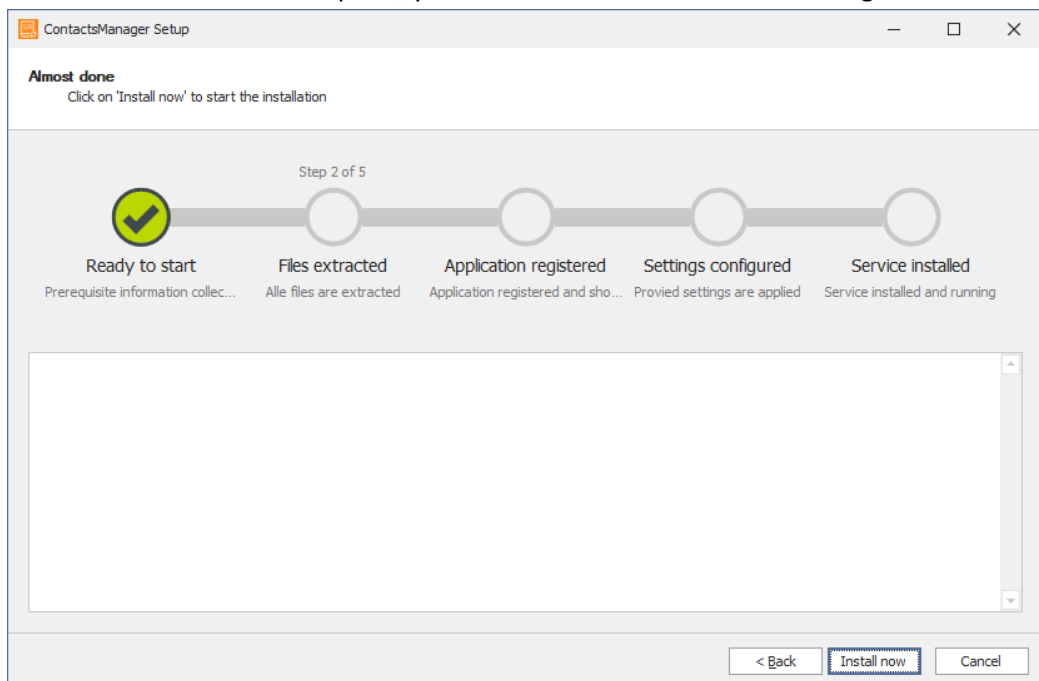
Accepting the license terms:

- In the first step of the installation wizard, you will be shown the license terms. Read them carefully and accept the terms and conditions to continue.



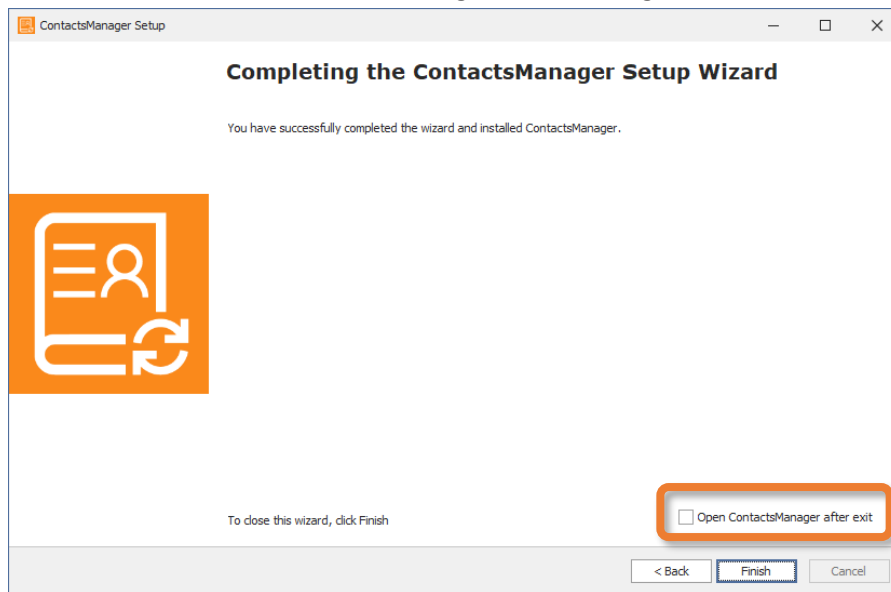
Complete installation:

- The installation wizard will now perform the installation. This step may take a few minutes. Once the installation is complete, you will receive a confirmation message.



## Starting the configuration

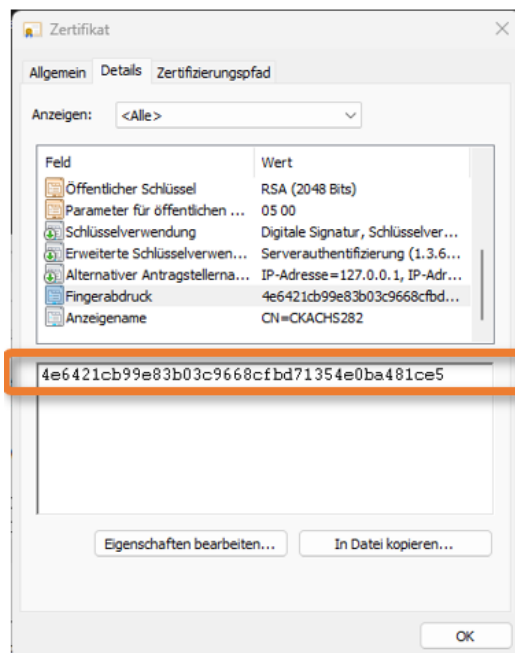
- After successful installation, the configuration can begin.



## 5. ADVANCED INSTALLATION

### 5.1 Configuring the certificate afterwards

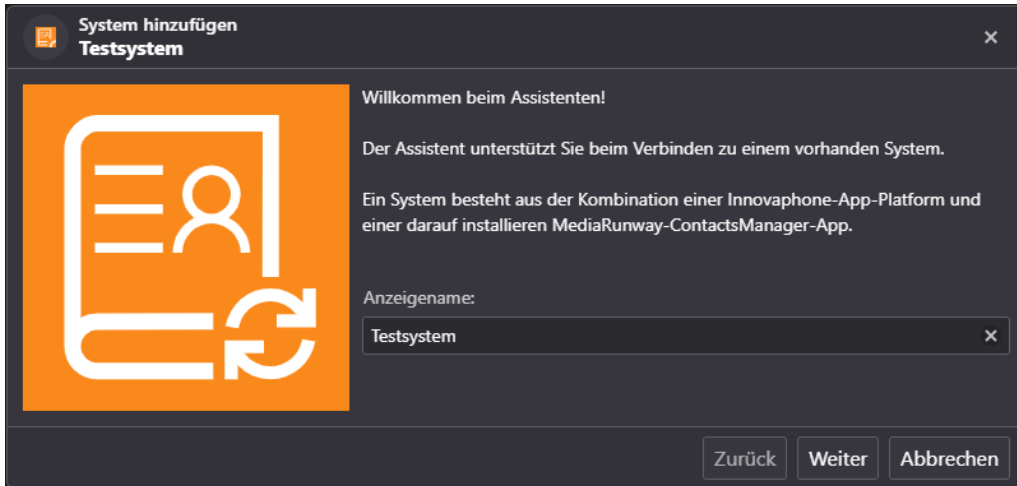
To bypass the browser's SSL error message, a certificate can be configured, including the thumbprint of the certificate in the file: `C:\Program Files\ContactsManager\appsettings. Enter Custom.json :`



## 6. GET STARTED

After installation, a connection to the ContactsManager app on the Innovaphone system must be established. This is used for configuration management and license checks.

- First of all, the name of the system is defined



**System hinzufügen**  
**Testsystem**

Willkommen beim Assistenten!

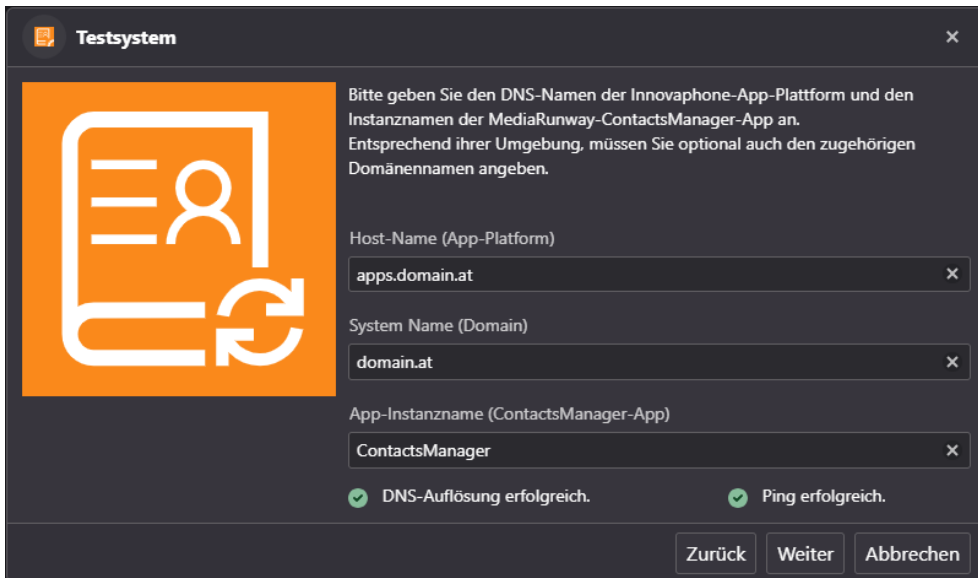
Der Assistent unterstützt Sie beim Verbinden zu einem vorhandenen System.

Ein System besteht aus der Kombination einer Innovaphone-App-Plattform und einer darauf installierten MediaRunway-ContactsManager-App.

Anzeigename:  
Testsystem

Zurück Weiter Abbrechen

- After that, the connection will be established



**Testsystem**

Bitte geben Sie den DNS-Namen der Innovaphone-App-Plattform und den Instanznamen der MediaRunway-ContactsManager-App an. Entsprechend ihrer Umgebung, müssen Sie optional auch den zugehörigen Domännennamen angeben.

Host-Name (App-Plattform)  
apps.domain.at

System Name (Domain)  
domain.at

App-Instanzname (ContactsManager-App)  
ContactsManager

✓ DNS-Auflösung erfolgreich. ✓ Ping erfolgreich.

Zurück Weiter Abbrechen

- Finally, the access data as set in the ContactsManager app on the Innovaphone system is entered

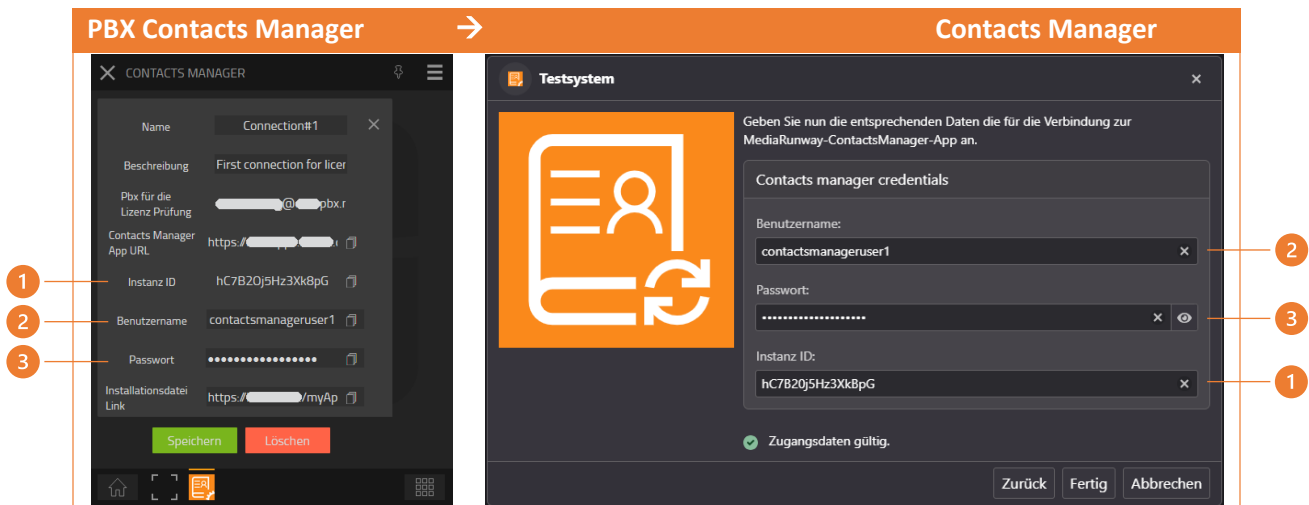
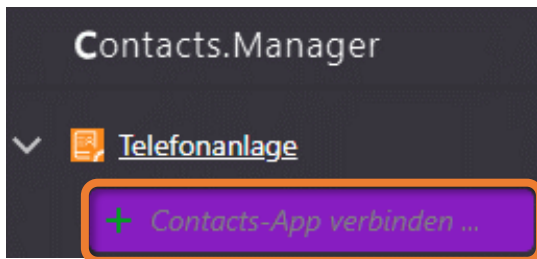


Figure 1 Credentials ContactsManager App Instance

## 7. CONNECT TO THE CONTACTS APP

Multiple Contacts App instances can be linked.

### 7.1 Connect Contacts App Instance



By clicking on "Connect Contacts app ..." the wizard starts.

### 7.2 Store access data

In the mask that opens, the access data as it appears in the "AP contacts" is entered.

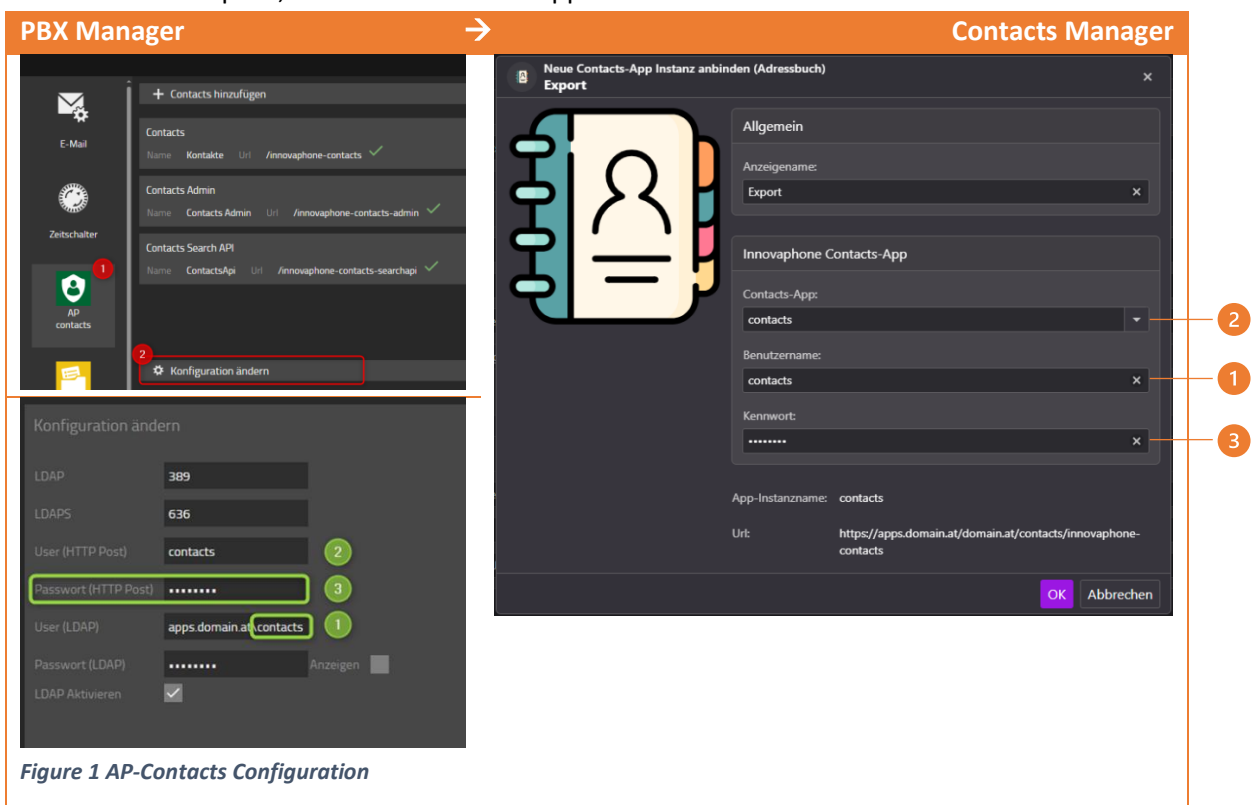


Figure 1 AP-Contacts Configuration

## 7.3 Configuring Reverse Lookup

In order for the inbound number resolution to work, you must configure the reverse lookup on the master PBX.

To do this, navigate to PBX Config General in the Admin UI → →

The screenshot shows the 'PBX Mode' configuration page in the innovaphone Virtual Appliance Admin UI. The 'Reverse Lookup URL' field is highlighted with a red box and contains the URL 'ldaps://apps.domain.at/dc=entries?displayname,state?sub?(metaSearchNumber=+%n)(telephoneNumber=00%n)?bindname=apps.domain.at\contacts'. The 'Password' field is highlighted with a green box and contains a masked password '.....'. A green circle with the number '3' is next to the password field.

- The reverse lookup URL to be entered is: "ldaps:// **apps.domain.at**/dc=entries?displayname,state?sub?(metaSearchNumber=+%n)(telephoneNumber=00%n)?bindname=apps.domain.at\contacts"
- Please adjust the **hostname** accordingly, the parameters to be displayed can be between **?..?**.
- The bind name in the URL = User (LDAP) in the AP-Contacts configuration (see Figure 1 AP-Contacts Configuration **1**)
- The password must be matched with the password in the AP-Contacts configuration "Password (HTTP Post)" (see Figure 1 AP-Contacts Configuration **3**)

## 7.4 Contacts on the stand phone

In order for the contacts to be available on the stand phone, the following settings in the Phone config must be rolled out to the desired users (via Config Template).



- Please adjust the settings according to the PBX configuration.
- The username = user (LDAP) in the AP-Contacts configuration (see Figure 1 AP-Contacts Configuration )
- The password must be matched with the password in the AP-Contacts configuration "Password (HTTP Post)" (see Figure 1 AP-Contacts Configuration )

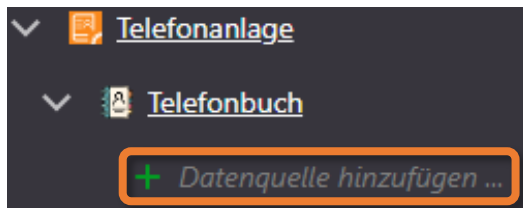
## 8. DEFINE DATA SOURCES

ContactsManager currently supports:

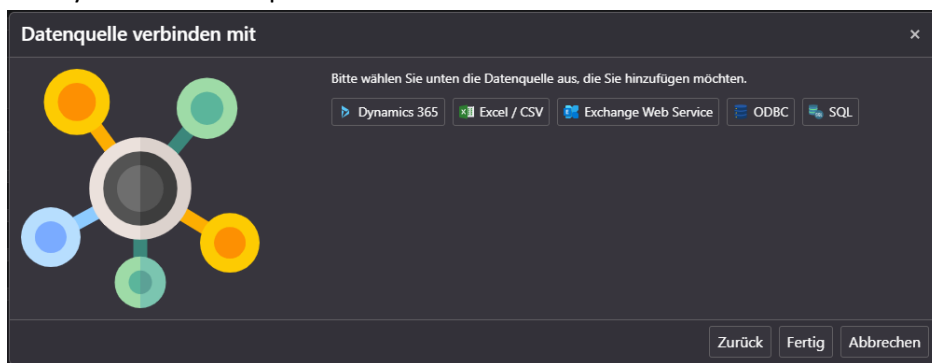
- Excel/CSV
- SQL
- Exchange
- ODBC

### 8.1 Adding Data Sources to Contacts App Instances

- By clicking on "Add data source..." the Data Source Connection Wizard opens



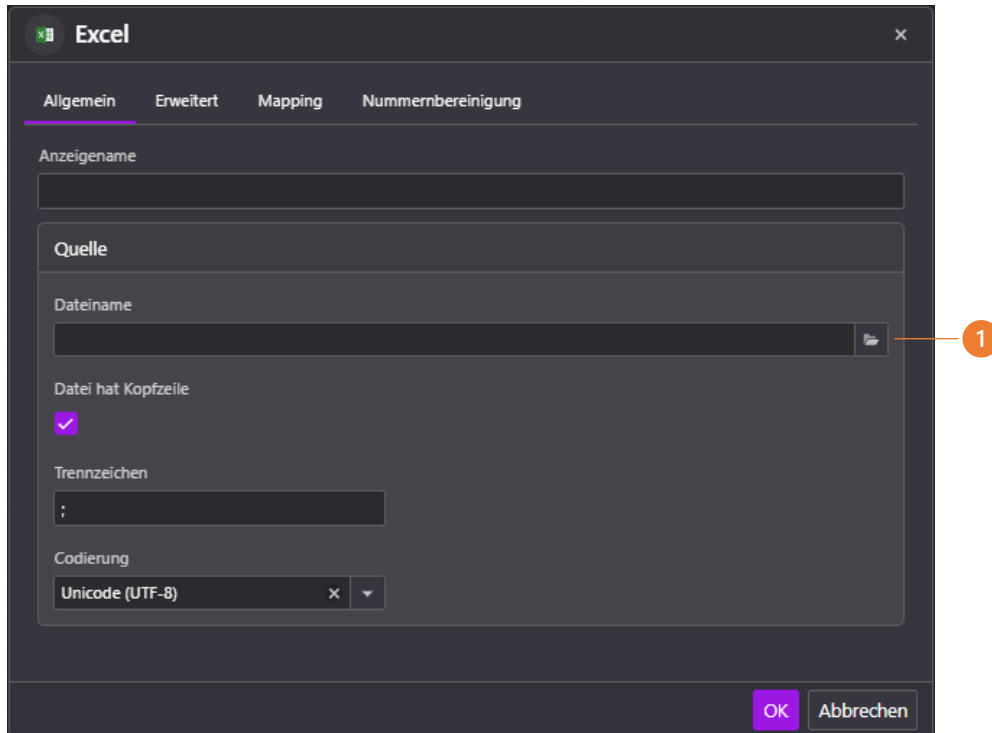
- Here you can add the possible data sources



## 8.2 Excel/CSV

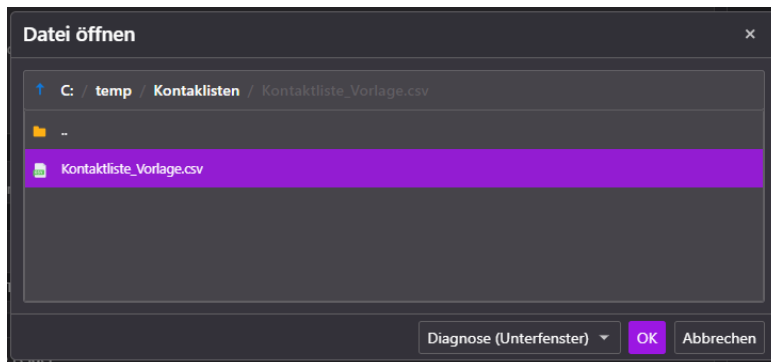
This connector is used to import data from csv, xls, and xlsx files.

### General



In the dialog that opens, you can define how the data is available in the source file.

The "Browse" button (1) on the file name can be used to navigate to the source file.



Once the file has been selected, its structure is analyzed and is available for field assignment.

## Advanced

By default, the application is run as a network service, with impersonation (1) the access data of a user can be entered, under whose identity the file access must take place.

The screenshot shows the 'Excel' application window with the 'Erweitert' tab selected. A red circle with the number 1 points to the checkbox 'Identitätswechsel durchführen'. Below this checkbox are three input fields: 'Benutzername', 'Domäne', and 'Kennwort'. At the bottom right, there are two buttons: 'OK' and 'Abbrechen'.

## Mapping

Mapping can be used to assign columns from the source file to the target record.

In the respective dropdown (2), the possible columns from the data source are available.

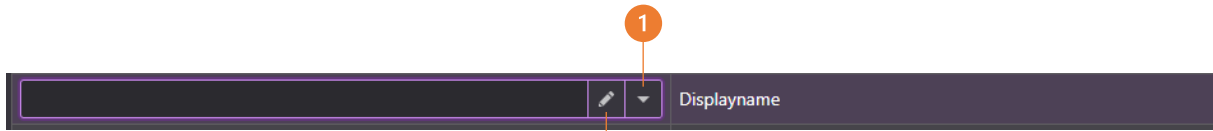
Preview (3) loads the contacts from the source file and displays the prepared results. There is no data exchange with the telephone system.

The screenshot shows the 'Excel' application window with the 'Mapping' tab selected. A dropdown menu is open, showing a list of columns from the data source. A red circle with the number 2 points to the dropdown. A red circle with the number 3 points to the 'Vorschau' button at the bottom left. The 'OK' and 'Abbrechen' buttons are at the bottom right.

## Advanced mapping

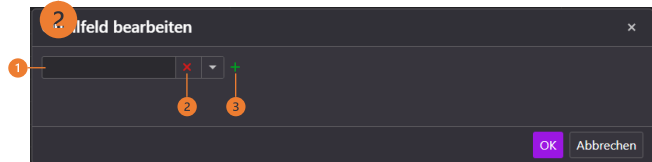
The easiest way to populate a target field from a data source is to select the corresponding field in the dropdown (1).

To create more complex content, the advanced editor can be opened via the pencil (2).

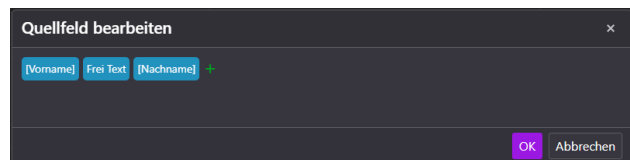


Here, existing fields of the data source and free texts can be strung together.

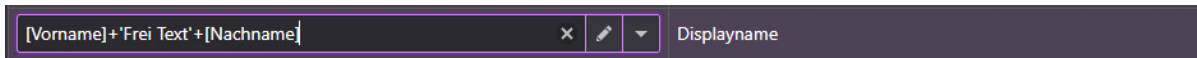
1. Select field / Enter text
2. Remove element
3. Add a new item



For example



This yields:

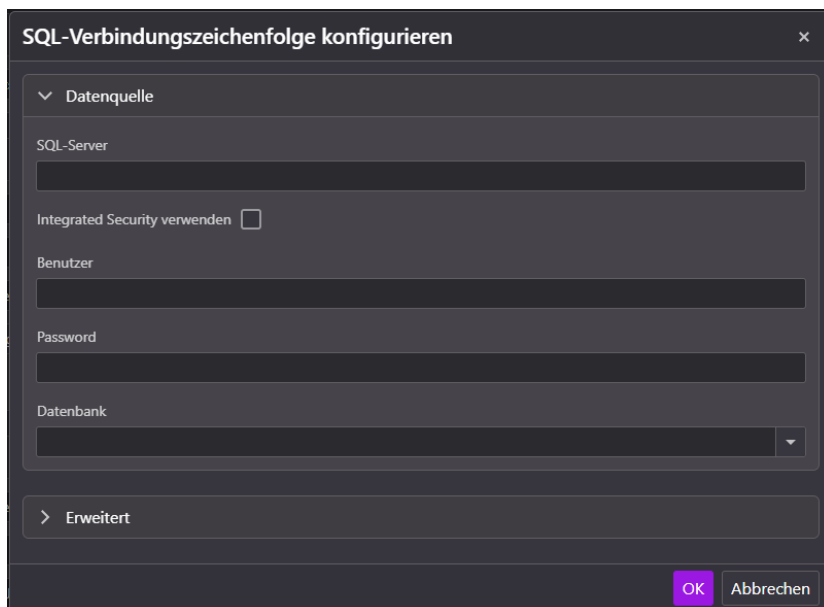
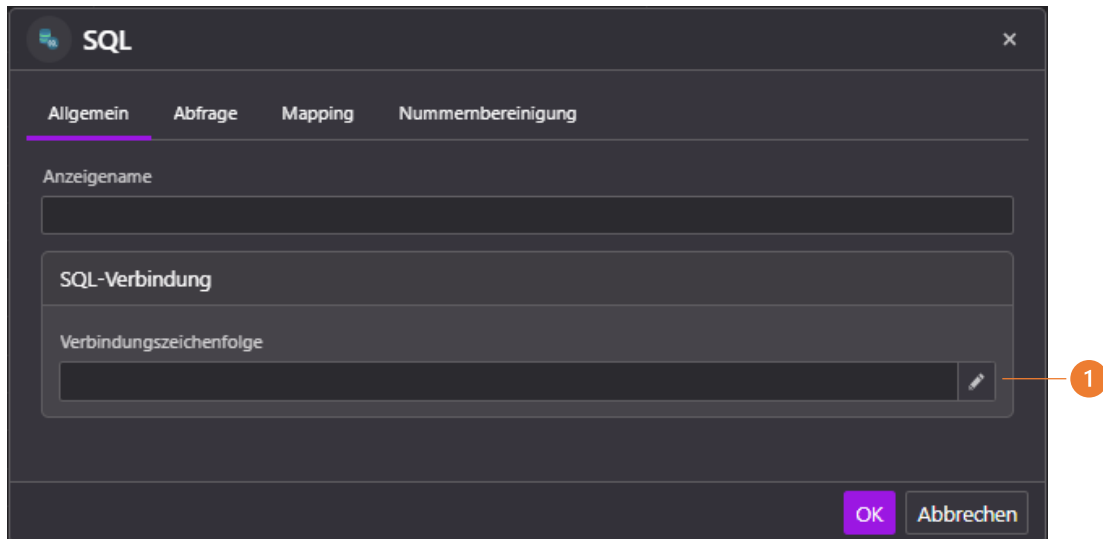


## 8.3 SQL

With the help of this connector, data can be imported from existing tables or freely definable T\_SQL queries.

### General

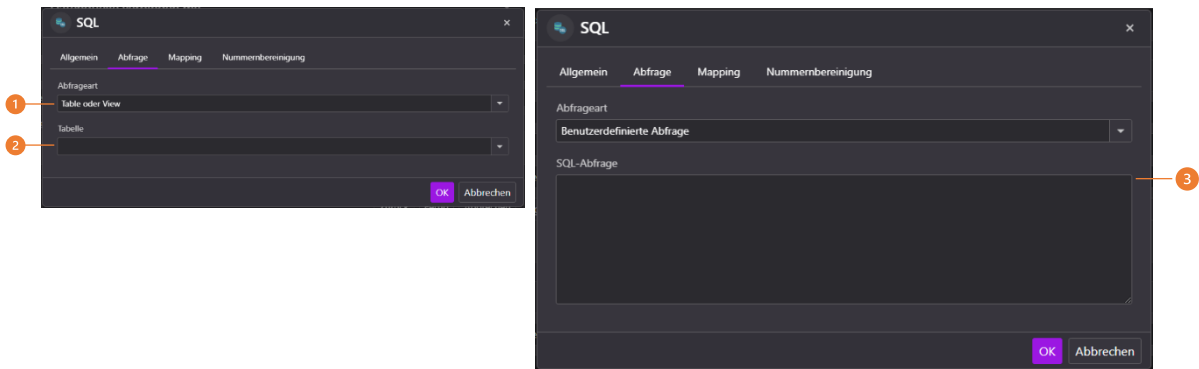
Here the SQL connection string can be specified, by clicking on the pencil (1) the editing mask for the connection string opens.



## Query

This defines which data is to be imported.

The query type (1) determines whether the data is collected from an existing table / view (2) or from the query result of the SQL query (3).



## Mapping

The mapping works in the same way as [Excel/CSV mapping](#).

## 8.4 Exchange

### Server Connection (1)

Under Server Connection, you can specify which Exchange variant it is, Exchange Online, Exchange OnPremise.

The screenshot shows the 'Exchange Web Service' configuration window. It has three tabs: 'Allgemein' (selected), 'Mapping', and 'Nummernbereinigung'. The 'Allgemein' tab contains the following sections:

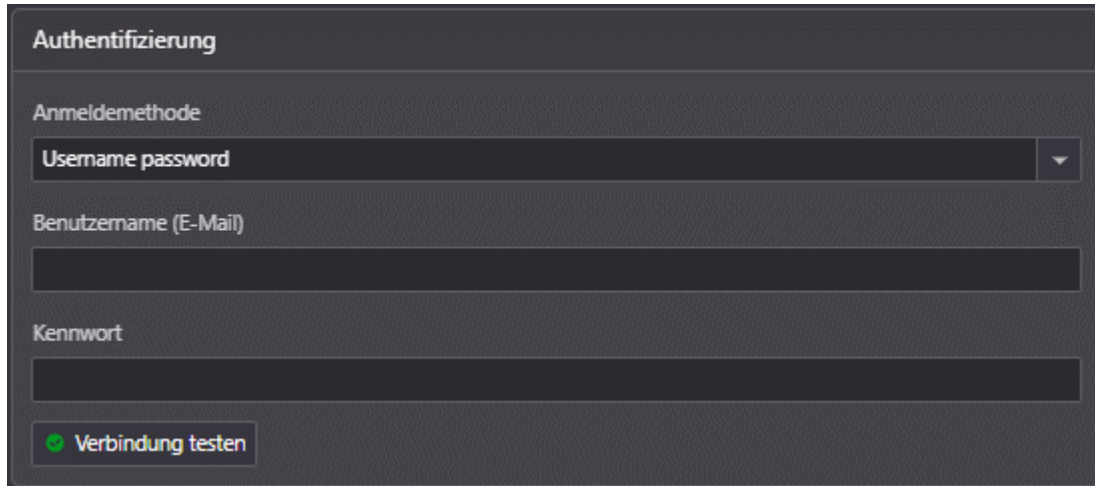
- Anzeigename:** A text input field.
- Serververbindung:** A section containing:
  - Server-Typ:** A dropdown menu set to 'Standard Exchange Server / On-Premises'.
  - Autodiscover:** An unchecked checkbox.
  - EWS-Url:** A text input field.
  - SSL-Fehler ignorieren:** An unchecked checkbox.
- Authentifizierung:** A section containing:
  - Anmeldemethode:** A dropdown menu set to 'Pass through'.
  - Verbindung testen:** A button with a green checkmark.
- Datenquelle:** A section containing:
  - Postfach:** A text input field.
  - Outlook-Ordner:** A text input field with a folder icon button to its right.
  - Unterordner miteinbeziehen:** An unchecked checkbox.

At the bottom right are 'OK' and 'Abbrechen' buttons. Four orange callout circles with numbers 1 through 4 point to the 'Serververbindung' section, the 'Authentifizierung' section, the 'Datenquelle' section, and the 'Outlook-Ordner' input field respectively.

## Authentication (2)

**8.4.1.1 Username password**

If the respective Exchange web service allows simple user+password authentication, this can be configured here.



The screenshot shows a configuration window titled 'Authentifizierung'. Under the 'Anmeldemethode' (Login method) dropdown, 'Username password' is selected. Below this, there are two empty text input fields labeled 'Benutzername (E-Mail)' and 'Kennwort' (Password). At the bottom left, there is a green checkmark icon followed by the text 'Verbindung testen' (Test connection).

**8.4.1.2 OAuth**

To synchronize with Exchange Online, an app registration in the respective Entra-ID tenant is required, here the Client ID, Client ID and Client Secret must be stored.

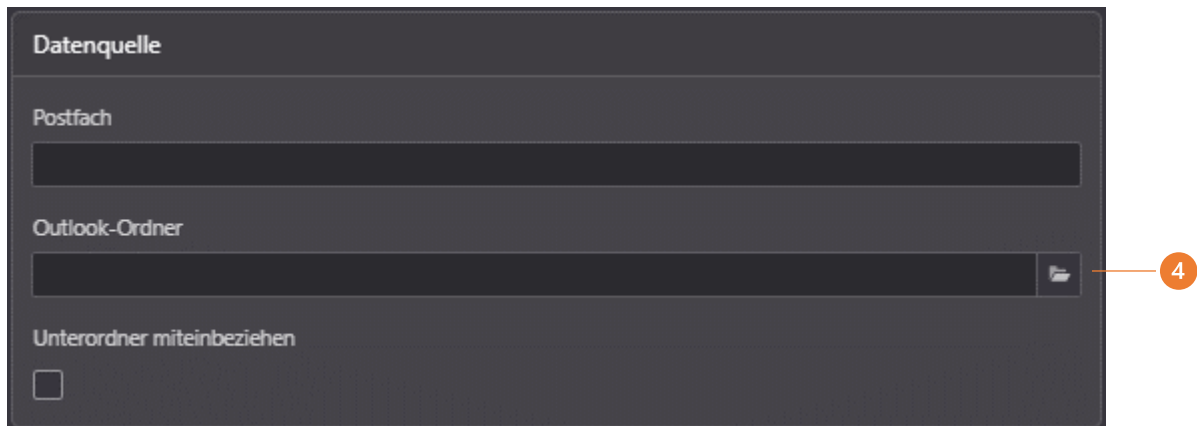


The screenshot shows a configuration window titled 'Authentifizierung'. Under the 'Anmeldemethode' (Login method) dropdown, 'OAuth' is selected. Below this, there are four empty text input fields labeled 'Benutzername (E-Mail)', 'Client ID', 'Tenant ID', and 'Client Secret'. At the bottom left, there is a green checkmark icon followed by the text 'Verbindung testen' (Test connection).

## Data Source (3)

The mailbox parameter can be used to query a different mailbox than the one used for the connection (shared mailbox),

The "Browse Folder" button can be used to select a subfolder to be imported.

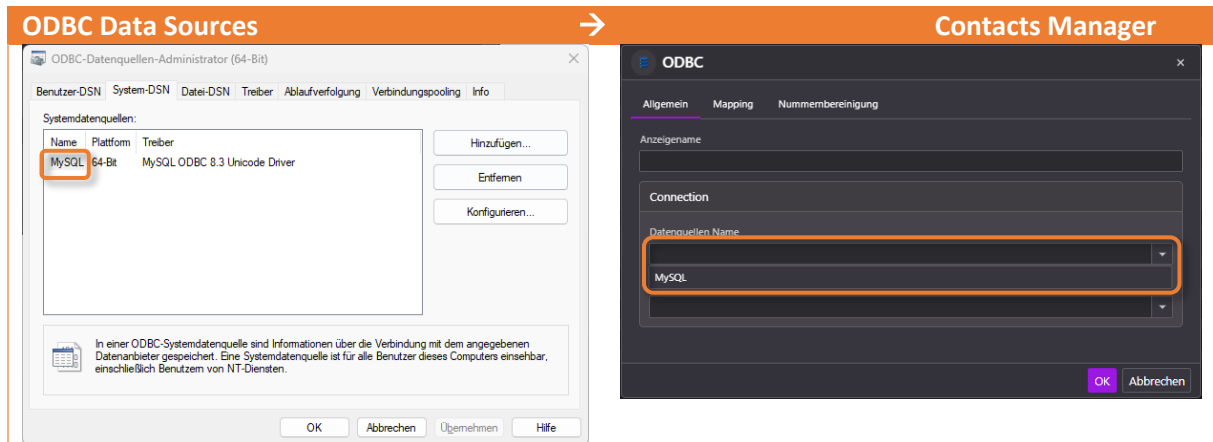


The screenshot shows a dark-themed configuration window titled "Datenquelle". It contains the following elements:

- Postfach**: A text input field.
- Outlook-Ordner**: A text input field with a folder icon button to its right. An orange callout bubble with the number "4" points to this button.
- Unterordner miteinbeziehen**: A checkbox.

## 8.5 ODBC

With the help of the ODBC connection, "system DSN" sources stored on the system can be integrated.



### Mapping

The mapping works in the same way as [Excel/CSV mapping](#).

## 8.6 Dynamics365

With the help of the Dynamics365 connection, contact data from Dynamics can be integrated.

**Dynamics 365**

General Mapping Number Cleanup Call Info

Anzeigename

Server Verbindung

Client ID 1

Tenant ID 2

Client Secret 3

Environment Url 4

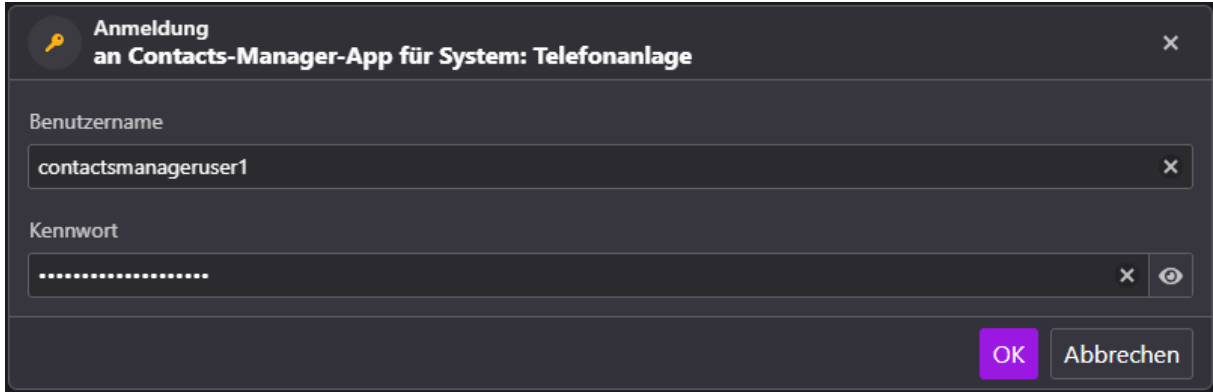
Verbindung testen

OK Abbrechen

Please note that in order to use the Dynamics365 connection, an app registration in Entra-ID (Client ID – 1, Tenant ID – 2) is required. A suitable client secret (3) must be stored to enable authentication. In addition, it is necessary to add the app registration in the Dynamics system as an application user and assign the appropriate roles to it in order to ensure access to the required data. The Environment Url (4) can be found in the environment that can [be found under https://admin.powerplatform.microsoft.com](https://admin.powerplatform.microsoft.com).

## 9. AUTHENTICATION

To prevent access by unauthorized persons, authentication is requested by the user when opening a ContactsManagerApp instance, username and password correspond to the access data of the ContactsManagerApp (see Figure 1 Credentials ContactsManager App Instance)



The screenshot shows a dark-themed login dialog box titled "Anmeldung an Contacts-Manager-App für System: Telefonanlage". It contains two input fields: "Benutzername" (Username) with the value "contactsmanageruser1" and "Kennwort" (Password) with masked characters. There are "OK" and "Abbrechen" (Cancel) buttons at the bottom right.

**Anmeldung**  
**an Contacts-Manager-App für System: Telefonanlage**

Benutzername  
contactsmanageruser1

Kennwort  
.....

OK Abbrechen

## 10. TROUBLESHOOTING

### 10.1 Troubleshooting:

- **Problem:** The installation fails.
- **Solution:** Make sure that you are running the Setup.exe as an administrator and that all system requirements are met. Try to start the installation again.
- **Problem:** No connection to the data source.
- **Solution:** Review the connection details and make sure that the appropriate permissions are in place.
- **Problem:** No connection to the Innovaphone system.
- **Solution:** Check the access data and make sure that the Innovaphone telephone system is accessible.
- **Problem:** Contacts can't be loaded into the Contacts app.
- **Solution:** Check if the ExtAnchor is defined in the mapping, contacts without a phone number will not be transferred.

### 10.2 Log files

The log files are located in the directory:

`C:\Windows\ServiceProfiles\NetworkService\AppData\Local\ContactsManager\Logs\`