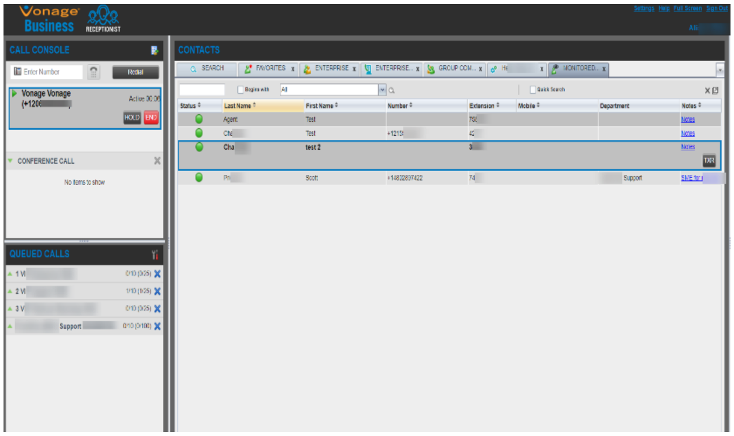
RECEPTIONIST



Manage Calls

Dial Contact

1. Click target directory tab in Contacts pane.
2. Click contact
3. Click CALL for contact.
4. Click right Call button and select number from list to dial an alternate number for a contact.

Dial Ad Hoc Number

1. Enter number
2. Click Dial .

Redial Number

Redial up to 10 most recent previously dialed numbers.

1. Click Redial in the Dialer. (Recent called number list appears)
2. Select number to call from list.

Dial from Call History

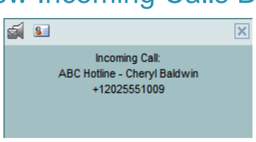
1. Click Call History from Call Console. (Dialog box appears)
2. Select Placed Calls, Received Calls, or Missed Calls from Show drop-down list.
3. Click a call log
4. Click Call for selected log.

View Current Calls

Current calls are always visible.

Display Conference Call Details: Click **Expand** button in the *Conference Call* panel.

View Incoming Calls Details



Incoming calls will appear in notification window above system tray (Call Notification feature *must be* enabled) with caller's name and number.

Call center name (diversion information, if applicable) along with caller's name and phone number are displayed for call center calls.

Save vCard

Save caller's contact information as VCard (Outlook only).

Click **Add vCard** in the *Call Notification* pop-up window.

Open URL

Open Uniform Resource Locator (URL) page in browser for incoming or current call details.

Click **Web Pop URL** in *Call Notification* pop-up window.

Answer Call

1. Move mouse over incoming call
2. Click **ANS**.

Hold Call (not available from remote office)

1. Move mouse over call.
2. Click **HOLD**.

Resume Call (not available from remote office)

1. Move mouse over call.
2. Click **ANS**.

End Call

Remove call from *Call Console*.

1. Hover over call.
2. Click END .

Blind Transfer

Calls can be blind transferred while active, held, or ringing.

1. Select call to transfer.
2. Transfer to ad hoc number: Enter number in *Dialer* and then click **Transfer**.
3. Transfer to contact (primary number): Click contact from directory and then click **TXR.**
4. Transfer to contact (not primary number): Click the right Transfer button and select number from list.

Supervised Transfer

Ensure transferred call is answered.

1. Select call in Call Console.
2. Dial number for target contact.
   – If number is busy, retry or dial another number.
3. Move mouse over new call
4. Click **TXR**.

Transfer with Consultation

Speak to call contact prior to transferring call.

1. Dial number for contact.
2. Speak to contact.
3. Select call to transfer in Call Console.
4. Move mouse over new call
5. Click TXR**.**

Transfer to Voice Mail

Send caller directly to contact's voice mailbox.

1. Select call to transfer in Call Console.
2. Click a contact with voice mail (Group/Enterprise or Favorites directory)
3. Click VM for contact.

NOTE: Select your name to transfer call to personal voice mailbox.

Transfer to Queue (Enterprise Edition)

1. Select call to transfer from the *Call Console*.
2. Expand *Queues* panel in *Contacts* pane.
3. Click **TXR** for desired queue.

Group Call Park (Enterprise Edition)

Feature searches within a predefined hunt group for an available line to park a call.

1. Click an active or held call in Call Console
2. Click **PARK** (call is parked on available extension and then removed from Call Console).

NOTE: Call is recalled to device and reappears in Call Console when call timer expires before call is answered.

Directed Call Pickup

Answer a call on behalf of another person.

1. Click Group/Enterprise or Favorites directory tab in Contacts pane.
2. Click ringing contact.
3. Click **ANS** (call appears in Call Console).

Start Three-Way Conference

1. Select one of the two calls to conference.
2. Hover mouse over second (non-selected) call
3. Click **CONF**.
4. Calls move to *Conference Call* panel.

Hold or Resume Conference

- To Hold: Click **HOLD** in the *Conference Call* panel header.
- To Resume: Click **ANS**.

Hold or Resume Conference Participant

- To Hold: Click **HOLD** in Conference Call panel header.
- To Resume: Click **ANS** for target call.

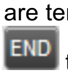
Leave Conference

Click **LEAVE** in *Conference Call* panel.

- The other parties remain connected.
- Calls are removed from the Conference Call panel.

End Conference

Calls are terminated and removed from Conference Call panel.

Click  to release all calls.

Barge In on Call

Establishes three-Way conference.

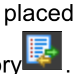
1. Click target directory tab.
2. Click busy contact
3. Click **BARGE**.

Send E-mail to Contact

1. Click target directory tab.
2. Click contact with e-mail.
3. Click **EMAIL**.
4. Enter required information in message window.
5. Click **SEND**.

View Call History

Call History displays placed, received, and missed calls.

1. Click Call History.
2. View Call Logs in a Group: Select group from Show drop-down list.

Delete Call Logs

1. Click **Call History** in *Call Console*.
2. Select call log in *Call History* dialog box
3. Click **Delete** for call.

OPTIONAL: Click **Delete All** to remove all call logs.

Receive Calls from Queues

Start or stop receiving calls from queues:

1. Click *Settings link* in top right-hand corner of main interface
2. Click *Application tab.*
3. Check Queue box for each call center to join in Queue Memberships section.
4. *Select Post Sign-In ACD State* from drop-down list in Operator Policies section.

Receptionist Interface

The main elements of the Receptionist interface include:

- Call Console
- Contacts Pane
- Queued Call Pane (Enterprise Edition)
- Setting and Help Links

Call Console

Location used to manage current calls. It contains the following:

- **Main Area**: Manage and list current call(s).
- **Dialer**: Place ad hoc calls and redial up to 10 of the most recently dialed numbers.
- **Conference Panel**: Manage and displays call legs for current conference call(s).

Name and phone number of remote party (if available), call state, call duration, and duration of how long call has been on hold, and information about user for a recalled call are displayed for each call.

Contacts Pane

Used to place calls to contacts and manage contact directories. Available contact directories:

- **Favorites**: Contacts selected from web portal whose line statuses are displayed.
- **Group/Enterprise**: Enterprise or group contacts.
- **Group/Enterprise Common**: Group's or enterprise's common phone list (created in BroadWorks).
- **Personal**: Contacts added to Personal directory in BroadWorks (web portal).
- **Speed Dial**: Speed dial numbers configured for Speed Dial 8 and/or Speed Dial 100 service.
- **Queues (Enterprise Edition)**: Assigned call centers
- **Outlook (Enterprise Edition)**: Outlook contacts (Outlook feature must be configured).
- **Custom (Enterprise Edition)**: Contacts added to custom directories on the web portal.
- **Managed Contacts (Enterprise Edition)**: Dynamically managed contacts.
- **LDAP (Enterprise Edition)**: Read-only access to Lightweight Directory Access Protocol (LDAP) contacts via Search feature (LDAP must be configured).

Contacts pane contains **Search** tab and capabilities used to search for contacts.

Queued Calls Pane (Enterprise Edition)

Manage queued calls for selected monitored call centers. The following information is provided:

- Call Status icon, which can be:
  - Call waiting to be answered.
  - Message being played to caller.
  - Call was reordered.
  - Call was bounced.
- Name/number of call center (or DNIS).
- Total call time, including time in current queue (in parentheses)

Additional details available when specific call is clicked on:

- Call priority bucket (Premium call center)
- Position of call in queue
- Name and number of calling party (if available)

Settings, Full Screen, and Help Links

- Click *Settings link* to display *Settings* page to configure Receptionist.
- Click *Full Screen link* to display Receptionist main window in full-screen mode.
- Click *Help link* to view Hosted Thin Receptionist User Guide in PDF format.

Manage Contacts

Show Directories

Choose which directory tab(s) to display (close) at top of Contacts pane and view the contents.

1. Click drop-down arrow (right of directory tabs).
2. Select desired directory.

Remove (close) Directory Tab: Click Close button on directory tab.

Monitor Contacts Statically

Configure *Favorites* directory from web portal to display phone state of contact(s).

Monitor Contacts Dynamically (Enterprise Edition)

Add contact to *Monitored Contacts* directory by going to *Group/Enterprise* directory and click contact's status icon.

Contact Phone and Calendar States

Possible contact phone states:

Available	On Call	Ringing	Private
Unknown	Forwarding	Do Not Disturb	

Possible calendar presence:

-In a Meeting

-Away.

NOTE: Information regarding parked call will appear if a call is parked against a statically (dynamically) monitored contact.

Manage Speed Dial and Personal Directories

1. **Edit**: Click Edit in Speed Dial or Personal tab.
   – *Speed Dials/ Personal Contacts* edit dialog box appears.
2. **Add**: Click Add (new row appears).
   – *Speed Dial* entry: Select dial code and enter number with description of contact.
   – *Personal entry*: Enter name and number.
3. **Delete**: Select entry and then click Delete.
4. **Modify**: *Speed Dial* entry: Double-click entry to make it editable and then modify as desired.

NOTE: *Personal* entries cannot be modified.

Perform Quick Search

1. Select directory to search, order it by column to search.
2. Check *Quick Search* box.
3. From keypad, select single character. Contact names that begin with the selected character (in the selected column) will appear in the directory.

Perform Regular Search

1. Select directory to search ***or*** click *Search* tab to search all directories.
2. Uncheck Quick Search box if searching in a specific directory.
3. Enter text for search in *Search* text box
   – Partial information permitted (minimum of two characters).
4. Check *Begins with* box to restrict search results to contacts that begin with the entered string.
5. Select column to search by from the drop-down list when searching a specific directory.
   – Specific column or all columns can be selected.
   – All columns are searched in *Search* tab.
6. Click the *Search* button.

Create Directory from Search Results

1. Perform search on a single column in specific directory.
2. Click *Pullout* button when results appear.
   – A new tab is created with the search results.

NOTE: Search results tab cannot be reopened once closed.

Manage Queues (Enterprise Edition)

Display Queued Calls

Select queues to display in *Queued Calls* pane to monitor calls.

1. Click ***Options*** and select Edit Queue Favorite Dialog menu item in Queued Calls pane,.
2. Check call centers to display in dialog box
3. Click Save.

Retrieve Call from Queue

1. Expand Call Center panel in Queued Calls pane.
2. Click the call
3. Click **RETRIEVE** for that call.
   – Call appears in *Call Console.*

Transfer Call to Queue

Transfer call to bottom of queue.

1. Expand *Call Center* panel in *Queued Calls* pane.
2. Click queued call.
3. Expand *Queues* panel in *Contacts* pane.
4. Click queue.
5. Click **TXR** for that queue.

Change Position of Call in Queue

1. Expand *Call Center* panel in *Queued Calls* pane.
2. Click queued call
3. Click **REORDER** for that call.
4. Select new position from drop-down list that appears.

NOTE: Call cannot be placed ahead of a bounced call.

Transfer Call to Top of Queue

1. Expand *Call Center* panel in *Queued Calls* pane.
2. Click queued call
3. Click **REORDER** for that call.
4. Select *Send to Front* from drop-down list that appears.

Promote Call in Queue (Premium Call Center)

Move call to the end of the next highest priority bucket.

1. Expand *Call Center* panel in *Queued Calls* pane.
2. Click queued call
3. Click **PROMOTE**.

Transfer Call to Contact or Ad-Hoc Number

1. Select queued call in *Queued Calls* pane.
2. **Transfer to Contact**: Click contact in *Contacts* pane *and* then click **TXR** for that contact.
3. **Transfer to Ad Hoc Number**: Enter number in *Dialer* *and* then click **Transfer** in the *Dialer*.

Keyboard Shortcuts

Key	Equivalent Mouse Action
ESC	Click the **Close** button in a dialog box.
ESC	Cancel the changes.
/	Click the *Dialer* text box.
?	Click the *Search* text box.
ARROW DOWN	Click the scroll bar or the next item on a list.
ARROW UP	Click the scroll bar or the previous item on a list.
PAGE DOWN	Scroll down one page.
PAGE UP	Scroll up one page.
1….9	Select a call in the *Call Console*.
SPACEBAR	Click **Answer** on the selected incoming call in the *Call Console*.
<PERIOD>	Click **End** on a selected call in the *Call Console*.
ENTER	Click **Dial**.
ENTER	Click **Search**.
+	Click **Transfer** in the *Dialer*.
SHIFT+1..9	Select a ringing call and click **Answer**.
SHIFT+1..9	Select an active call and click **Hold**.
SHIFT+1..9	Select a held call and click **Retrieve**.
S or s	Click on **Settings** link.
B or b	Click on the **Back to Application** link.
R or r	Click the **Call History** button.
H or h	Click the **Help** link.
SHIFT+L or SHIFT+l	Click the **Sign Out** link.