



# Hosted VoIP Phone System

Blue Platform

## Hosted Receptionist Console User Guide



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## 1 About This Document

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This guide provides step-by-step procedures and reference information for the Hosted Receptionist Console.

Hosted Receptionist hereafter is referred to as Receptionist, Receptionist client, or client.

### 1.1 Audience

This document is intended for end users of Receptionist Console.

### 1.2 How This Guide is Organized

The following table identifies the sections to refer to for information about the functionality provided by Receptionist.

| Section  | Overview   |
|--|--|
| <a href="#">Introduction to Receptionist</a>         | This section provides an overview of Receptionist.   |
| <a href="#">Getting Started</a>                      | This section describes how to sign in and out of Receptionist, perform the initial setup, change password, and obtain help.                              |
| <a href="#">Explore Workspace</a>                    | This section provides an overview of the user interface.   |
| <a href="#">Manage Calls</a>                         | This section provides information on how to make and manage calls. This includes using your contacts to make calls or perform actions on existing calls. |
| <a href="#">Message Contacts</a>                     | This section includes information on how to send e-mail messages to contacts.  |
| <a href="#">Manage Contacts</a>                      | This section provides information on managing contact directories and searching for contacts.  |
| <a href="#">Monitor Contacts</a>                     | This section describes static and dynamic monitoring and includes information on how to select contacts to monitor.                                      |
| <a href="#">Manage Call History</a>                  | This section provides information on managing call logs.   |
| <a href="#">Manage Queued Calls</a>                  | This section provides information on managing queued calls.  |
| <a href="#">Configure Receptionist</a>               | This section describes the settings you can configure to set up and customize Receptionist for improved usability.                                       |
| <a href="#">Appendix A: Glossary and Definitions</a> | This appendix contains definitions of call states and phone states used in Receptionist.   |
| <a href="#">Appendix B: Keyboard Shortcuts</a>       | This appendix describes keyboard shortcuts available in Receptionist.  |

### 1.3 Software Requirements

The software requirements include:

- Operating Systems currently supported by Microsoft or Apple, or Citrix XenApp 4 or 5
- Sun Microsystems 32-bit Java 6 Update 19 to Update 45, Runtime edition only
- Sun Microsystems 32-bit Java 7 Update 11 or later, Runtime edition only
- Outlook 2003, 2007, 2010, or 2013 (32-bit or 64-bit edition) – Required for Outlook contact directory
- Microsoft Exchange 2007 SP3 or Microsoft Exchange 2010 SP1 – Required for Calendar Presence Integration
- Microsoft Excel (Optional)
- Flash Player 9 or 10.X Runtime (ActiveX Control)
- Internet Explorer 8.0, 9.0, or 10.0 (**Compatibility View enabled**); Firefox 3.6 through 25; Google Chrome 17.0.963.64 or later, or Safari 5

#### **Browser Javascript Requirements:**

Javascript must be enabled on Internet Explorer.

- 1) Open Internet Explorer
- 2) Click the **Tools** button.
- 3) From the drop-down list, select *Internet Options*.
- 4) Select the *Security* tab.
- 5) Select the **Internet Zone**.
- 6) Click the **Custom level...** button.
- 7) In the *Scripting* category, click the **Enable** button for the *Active Scripting* subcategory.
- 8) In the *Scripting* category, click the **Enable** button for the *Allow status bar updates via script* subcategory.
- 9) Click the **Yes** button when prompted with a message box asking, *Are you sure you want to change the settings for this zone?*
- 10) Click **OK** in the *Internet Options* dialog *Security* tab.
- 11) Close and restart Internet Explorer.

NOTE: Best practice recommends always using the latest available service pack/update for Windows, Max OS X, Internet Explorer, Firefox, Safari, and Outlook.

Internet Explorer 9.0 or higher (with Compatibility View enabled) is the recommended browser for best results with the Receptionist client.

## 2 Introduction to Receptionist

Receptionist is a carrier-class Internet Protocol (IP) Telephony Attendant Console, specifically developed for hosted environments. It is used by “front-of-house” receptionists or telephone attendants, who screen inbound calls for enterprises. Receptionist realizes the promise of IP telephony by enhancing business processes and delivering rich services in a user-friendly way.

Receptionist delivers the following real benefits to users:

- An elegant design that is aesthetically pleasing.
- An ergonomic design that follows the natural work “flow” of a call from the left to the right of the screen.
- Improved business processes as only “valid” options are presented to the attendant.
- Professional call handling as critical information is available in “real time.”
- Accurate delivery of messages through a one-step process when people are unavailable.
- Web-based interface, accessible from a web browser.

This document describes the Hosted Receptionist client.

### 2.1 Receptionist Enterprise

Receptionist is a VoIP Phone System full-featured client, designed to support the needs of front-office personnel in any environment. It supports the full set of call control options, large-scale line monitoring, queuing, multiple directory options, views, Outlook Integration, and other features required in large or distributed organizations.

#### 2.1.1 User Interface

Figure 1 shows the main interface of Receptionist Enterprise.

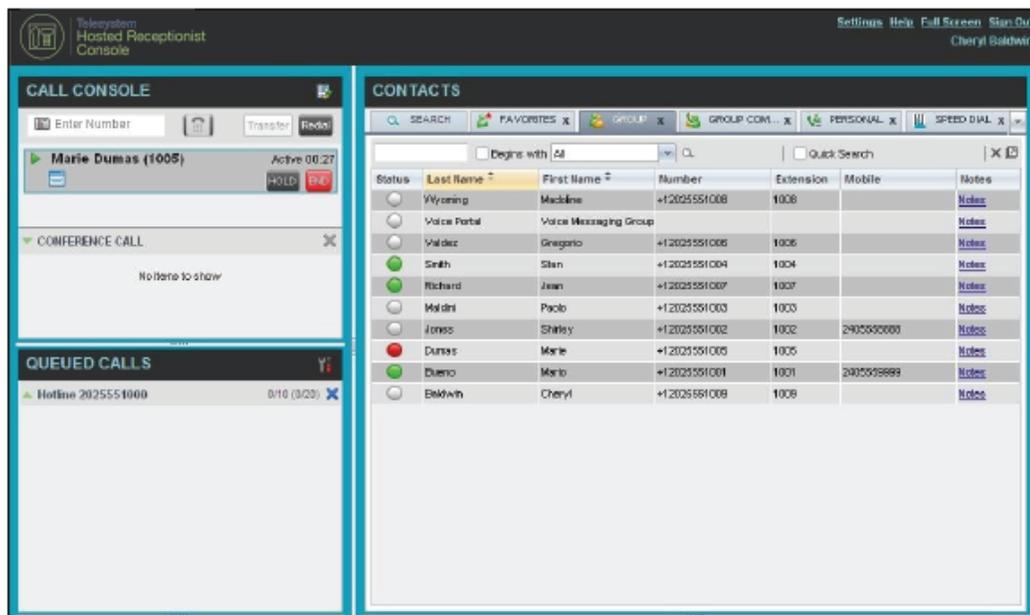


Figure 1 Receptionist Enterprise Main Interface

The interface contains the following main work areas:

- **Logo pane** – The *Logo* pane displays links to other pages or functions of Receptionist and provides information about the logged user. It also displays error, warning, and information messages to the user.
- **Call Console** – This is where you view and manage your current calls.
- **Queued Calls pane** – This is where you manage queued calls. You need to have the Hosted Call Center Supervisor service assigned to have access to this feature.
- **Contacts pane** – This pane contains your contact directories, which you use to make calls to contacts and monitor selected contacts.
- **Settings pages** – You use the *Settings* pages, accessed via the Settings link, to configure various aspects of Receptionist.
- **Call History dialog box** – You use the *Call History* dialog box to view and return your past calls.

For more information, see section [4 Explore Workspace](#).

### 2.1.2 Contact Directories

This following table lists the contact directories available in Receptionist Enterprise. The *Comments* column specifies additional settings required to access the directory.

| Directory Name                             | Contents  | Comments   |
|--|---|--|
| Favorites                                  | This consists of the contacts whose phone status you are currently monitoring. The list of contacts to monitor must be configured for you or by you on the web portal.  | Monitoring is limited to 8 static users group-wide.  |
| Group/Enterprise                           | This consists of all contacts in your group or enterprise directory. This is the same directory that you can access through the web portal. However, if your enterprise administrator restricted your access to your enterprise directory, you can only see the contacts in your group. | You can dynamically monitor contacts in your Group/Enterprise directory. The maximum number of contacts you can dynamically monitor is configured by your administrator. The default is 100. |
| Group/Enterprise Common                    | This consists of all contacts in your group/enterprise's common phone list configured by your administrator on the Hosted VoIP Phone System Admin Portal.   | The directory may be empty if your administrator has not configured any contacts.  |
| Personal                                   | This consists of all contacts in your personal directory on the Hosted VoIP Phone System User portal.   |  |
| Speed Dial                                 | This consists of all speed dial codes configured for you or by you for your Speed Dial services.  | You need to have Speed Dial 8 and/or Speed Dial 100 services assigned.   |
| Queues                                     | This consists of the call centers and associated DNIS numbers that you are staffing as an agent or supervising. It allows you to transfer calls into queues quickly.  | You need to have Call Center service assigned.   |
| Custom:<br><custom contact directory name> | This consists of all contacts in your custom contact directories configured by your administrator on the web portal. Each custom directory is displayed in a separate tab.  | You may not have any contact directories or you may have several.  |
| Outlook                                    | This consists of all your Outlook contacts.   | You need to have Outlook Integration service assigned.   |

For information on managing your contact directories, see section [7 Manage Contacts](#); for information on using your contacts to make and manage calls, see section [5 Manage Calls](#); for information on monitoring contacts, see section [8 Monitor Contacts](#).

### 2.1.3 Call Management Functions

The Receptionist Enterprise provides the following call management functions:

| Function                  | Quick Reference                                    |
|---------------------------|--|
| View Call Details         | <a href="#">View Call Information</a>              |
| Dial Contact              | <a href="#">Dial Contact</a>                       |
| Dial Ad Hoc Number        | <a href="#">Dial Ad Hoc Number</a>                 |
| Redial                    | <a href="#">Redial Number</a>                      |
| Speed Dial                | <a href="#">Speed Dial</a>                         |
| Dial From Call History    | <a href="#">Dial from History</a>                  |
| Answer Call               | <a href="#">Answer Call</a>                        |
| Hold Call                 | <a href="#">Put Call on Hold</a>                   |
| Resume Held Call          | <a href="#">Resume Held Call</a>                   |
| End Call                  | <a href="#">End Call</a>                           |
| Blind Call Transfer       | <a href="#">Blind Transfer Call</a>                |
| Supervised Call Transfer  | <a href="#">Conduct Supervised Transfer</a>        |
| Consulted Call Transfer   | <a href="#">Transfer with Consultation</a>         |
| Transfer to Voice Mail    | <a href="#">Transfer to Voice Mail</a>             |
| Transfer to Queue         | <a href="#">Transfer to Queue</a>                  |
| Busy Camp On              | <a href="#">Conduct Busy Camp On</a>               |
| Group Call Park           | <a href="#">Conduct Group Call Park</a>            |
| Directed Call Pickup      | <a href="#">Pick Up Call</a>                       |
| Operator Call Barge-in    | <a href="#">Barge in on Call</a>                   |
| Start Conference Call     | <a href="#">Start Three-Way Conference</a>         |
| Add Participant           | <a href="#">Add Participant to Conference</a>      |
| Hold Conference Call      | <a href="#">Hold Conference</a>                    |
| Resume Conference Call    | <a href="#">Resume Held Conference</a>             |
| Put Participant on Hold   | <a href="#">Put Conference Participant on Hold</a> |
| Take Participant off Hold | <a href="#">Resume Conference Participant</a>      |
| End Participant           | <a href="#">Remove Conference Participant</a>      |
| Leave Conference Call     | <a href="#">Leave Conference</a>                   |
| End Conference Call       | <a href="#">End Conference</a>                     |

For more information, see section [5 Manage Calls](#).

### 3 Getting Started

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Receptionist is hosted on the Hosted VoIP Phone System and you access it over the network either from your web portal or from a web browser.

**NOTE 1:** The minimum required screen resolution for Receptionist is 1024 x 768 pixels.

**NOTE 2:** Receptionist does not support signing in as different users from the same machine at the same time.

**NOTE 3:** When using the Outlook Integration feature with Microsoft Outlook 2010 (32- or 64-bit edition), make sure Outlook is running before Receptionist is launched; otherwise, Outlook Integration functionality does not work.

**NOTE 4:** To enable the Full Screen link in Internet Explorer, configure Internet Explorer as specified in section [11.1 Configure Internet Explorer for Full Screen Mode](#).

**NOTE 5:** Java (minimum Version 7 Update 51) is required for some features to work. For best results it is recommended to access Receptionist from Internet Explorer.

#### 3.1 Launch Receptionist from Web Portal

The Hosted VoIP Phone System has a Single Sign-On feature. When you access the Receptionist client from the web portal, you do not need to provide your credentials since you are already logged in to the web portal.

**To access Receptionist from the web portal:**

- 1) Log in to your Hosted VoIP Phone System User portal at <https://admin.euserportal.com>.
- 2) From the *Launch* drop-down list at the top right-hand side of the Telesystem *Logo* pane, select the link for your Receptionist service. Receptionist starts and you are automatically signed in.

### 3.2 Sign in from Web Browser

When signing in to the client, use the same credentials you use to connect to the web portal.

**To access Receptionist from a web browser:**

- 1) In your web browser, enter the URL of the Receptionist client (<https://app.euserportal.com/receptionist/>). The Receptionist *Sign-in* page appears.

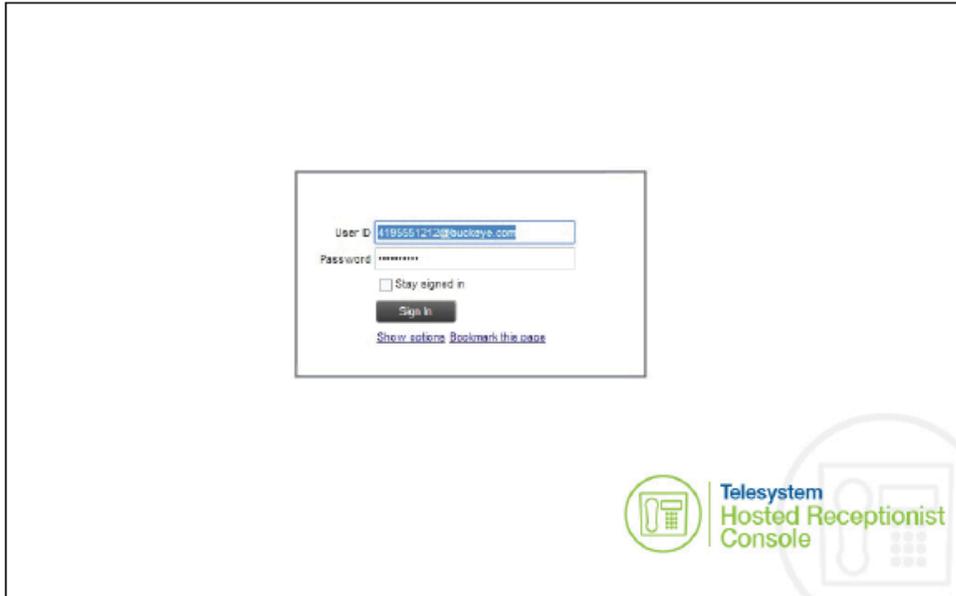


Figure 2 Receptionist Sign-in Page

- 2) Enter your Hosted VoIP Phone System user ID (10-digit phone number) and your password. If you are unsure of your user ID and password, contact your company (group or enterprise) administrator.

If you use the default domain, you can enter just the *user* part of your ID. The system then appends the default domain to it before authenticating you. If your domain is different from the default domain, you have to enter your user ID with the domain name.

Optionally, if your system has been configured to allow it, you can configure your domain name.

- 3) To configure your domain or the Receptionist language, click **Show options**. The area expands displaying advanced options.



Figure 3 Receptionist Sign-in Page – Advanced Options

- 4) To configure your domain, in the *Append Domain* text box, enter your domain name. When you enter your user ID without a domain, the system appends the configured domain instead of the default domain.
- 5) To change the language, from the *Language* drop-down list, select a new language.
- 6) Check *Stay signed in* to instruct the client to automatically connect and sign in to the server when it detects a network connection.

This should generally be enabled to help mitigate intermittent internet connections. When disabled, the client signs out the user when the connection is lost.

- 7) To add a bookmark to the *Receptionist Sign-in* page in your browser, click **Bookmark this page** and follow the instructions of your browser.
- 8) Click **Sign In**.

Receptionist starts and you are signed in.

**NOTE:** In some browser/operating system combinations, when you press ENTER instead of the Sign In button, a blank page appears and not the Receptionist main interface.

### 3.3 Sign-in Restrictions

You can only have one active Receptionist session at a time. When you sign in from a second location, you are automatically signed out from the original location with the following message: “You have been signed out as you have signed in from another location.”



Figure 4 Sign-in Dialog Box with Error Message

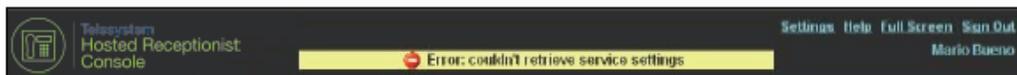


Figure 5 Receptionist Main Interface (Top of Page) with Error Message

### 3.4 Get Help

Receptionist provides you with online access to a portable document format (PDF) version of this guide.



Figure 6 Main Interface (Top of Page) – Help Link

**To access this document:**

Click the **Help** link at the top right-hand side of the main interface.

### 3.5 Sign Out

#### To sign out of Receptionist:

- 1) Click the **Sign Out** link at the top right-hand side of the main interface.

A message appears asking you whether you would like to save your current workspace.

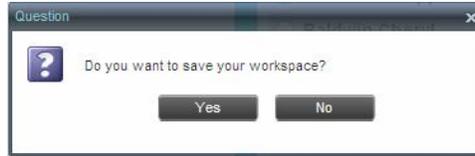


Figure 7 Question Dialog Box

- 2) Click **Yes** to save your current workspace. This allows you to retain the same setup at your next session.
- 3) For information on workspace elements that can be customized, see section [12.1.5 Workspace](#).

### 3.6 Set Up Your Environment

It is recommended that you configure Receptionist as follows when you first log in:

- Select call centers to manage – see section [10.1 Select Call Centers to Manage](#).
- Join queues and set your post sign-in ACD state – see section [12.2 Settings – Application](#).

For information about other Receptionist configuration options, see section [12 Configure Receptionist](#).

### 3.7 Change Your Password

Remember that this is your web portal password and that you have to use this new password when accessing your web portal. The password must follow the password rules set on the Hosted VoIP Phone System.

#### To change your password:

- 1) At the top right-hand side of the main interface, click the **Settings** link. The *Settings – General* page appears.
- 2) In the *Account* area, click the **Change Password** link. The area expands allowing you to change your password.

Figure 8 Account – Change Password

- 3) Enter your current and new password and click **Change Password**.

Note that the Reset button does not reset your password. It only clears the input boxes.

## 4 Explore Workspace

When you sign in to Receptionist, the main page appears where you perform most of your call management and monitoring tasks. In addition, the main page provides a link to the *Settings* pages, where you configure various Receptionist settings.

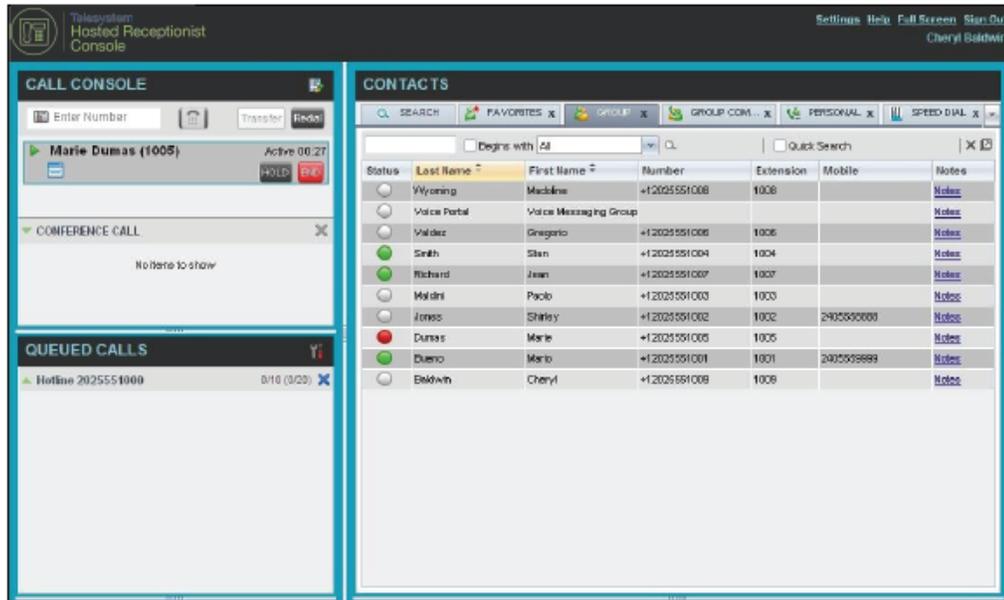


Figure 9 Receptionist Enterprise Main Interface

Many visual aspects of Receptionist are configurable. For example, you can decide which elements should be visible and change their size. You can then save your workspace and retrieve it the next time you log in. For more information on saving your settings, see section [12.1.5 Workspace](#).

To work in full screen mode, click the *Full Screen* link at the top-right corner of the main window. The link changes to *Exit Full Screen*, which you can click to exit full screen mode.

**NOTE 1:** To work in full screen mode, you can also click F11 when the main window is in focus.

**NOTE 2:** The Back, Forward, and Refresh operations of the web browser are not supported by Receptionist; and if performed, the results are inconsistent.

**NOTE 3:** When a window is vertically resized, the panes do not always resize to fill the window. To resize a window, drag the window from the bottom right-hand corner or collapse and then expand the panes after resizing to adjust them to the window.

You can also resize the *Call Console* and the *Contacts* panes by moving the bar between the two to the left or to the right. Receptionist remembers the position of the bar at sign-out, and the bar is at the same position the next time you sign in.

Most Receptionist controls are context-based, which means that they appear only when the action they represent can be taken. Context-based controls that allow you to take actions on calls are called action buttons. For the list of controls available in Receptionist, see section [4.5 Controls](#). The action buttons are described in section [4.5.1 Call Action Buttons](#).

This section describes the following elements of the Receptionist main interface:

- [Logo Pane](#)
- [Call Console](#)
- [Contacts Pane](#)
- [Queued Calls Pane](#)
- [Controls](#)

The *Settings* pages, accessed via the Settings link and used to configure Receptionist, are described in section [12 Configure Receptionist](#).

The *Call History* dialog box is described in section [9 Manage Call History](#).

#### 4.1 Logo Pane

The Receptionist main page and *Settings* pages contain a *Logo* pane, which displays the Receptionist client or company logo, global messages, links to other interface elements or Receptionist functions, and information about the signed-in user.

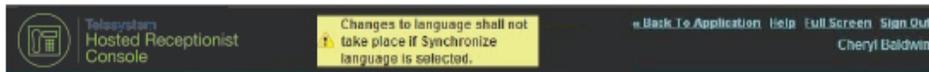


Figure 10 Receptionist Logo Pane

##### 4.1.1 Global Message Area

The *Global Message Area*, that is, the center area of the *Logo* pane, is used by Receptionist to display information, warning, and error messages to the user. A message is displayed for several seconds and then disappears.

##### 4.1.2 Settings, Help, and Sign Out Links

The *Logo* pane displays links to the *Settings* pages, where you can configure the client, and the Help and Sign Out links.

##### 4.1.3 Signed-in User Information

Information about yourself, such as, your name and your availability to take calls is displayed at the top right-hand side of the main interface, as applicable.

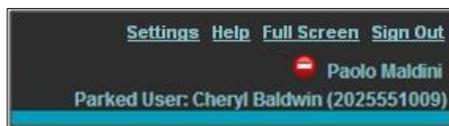


Figure 11 Signed-in User Information

Your current availability icons are displayed to the left of your name as follows:

- Information about the following services and features:
  - Call Forwarding Always (CFA) – You have activated the Call Forwarding Always service.
  - Do Not Disturb (DND) – You have activated the Do Not Disturb service.

The information is presented in the following format:

If a call is parked against your extension, the following information appears:

Parked User: <First Name> <Last Name> (<Phone Number/Extension>).

## 4.2 Call Console

You use the *Call Console* to view and manage your current calls. For information on managing your calls, see section [5 Manage Calls](#).

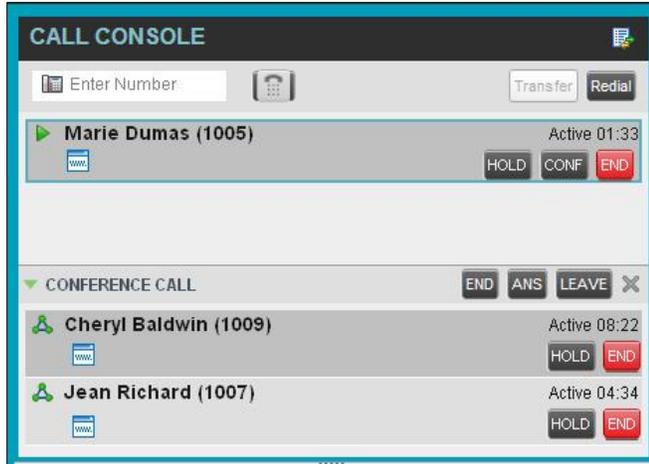


Figure 12 Call Console

The *Call Console* contains the following areas:

- [Header](#)
- [Dialer](#)
- [Current Calls](#)
- [Conference Call Panel](#)

### 4.2.1 Header

The Call Console header may contain the following controls based on your company's Receptionist configuration:

- Call History button  – This allows you to access the list of your previous calls.
- Call Waiting button  – This allows you to enable the Call Waiting service.
- Auto Answer button  – This allows you to answer your calls automatically.

### 4.2.2 Dialer

The *Dialer*, located at the top of the *Call Console*, below the header, allows you to make ad hoc calls.



Figure 13 Call Console – Dialer

- The *Enter Number* text box is where you enter the number to dial.

- The buttons to the right, called action buttons, change depending on the context, and allow you to perform operations on calls. For more information, see sections [4.2.5 Call States and Actions](#) and [4.5.1 Call Action Buttons](#).

### 4.2.3 Current Calls

The *Call Console* displays your current calls and allows you to take actions on them.

If you are involved in a conference call, its details are displayed in the *Conference Call* panel at the bottom of the *Call Console*. The *Conference Call* panel is described in the following section.



Figure 14 Call Console – Current Calls



Figure 15 Call Console – Call with Diversion Information

Each call is listed on a separate line with the following information:

- Remote CLID – This is the name of the remote party (if available) and the phone number in parenthesis.
- Diversion CLID – This is the name (if available) of the party who diverted (transferred/forwarded) the call before you received the call and the phone number in parenthesis. If the call was diverted more than once, the last party who diverted the call is listed first; the second-to-last party is listed second; and so on.

For a recalled call, the following information appears: Recall : <Caller's name>; via: <Call parked against user>.

- Call State icon – This is a visual representation of the current state of the call. For more information, see section [4.2.5 Call States and Actions](#).
- Call State name – This is the display name of the state the call is currently in.
- Call duration [Held duration] – This is the duration of the call from the time the call was received from the Hosted VoIP Phone System and it accurately reflects how long the call has been present in the system. In addition, for held calls, the time a call has been on hold is also displayed.

- Action buttons – These buttons are for the operations that you can currently take on the call. For more information, see sections [4.2.5 Call States and Actions](#) and [4.5.1 Call Action Buttons](#).

#### 4.2.4 Conference Call Panel

The *Conference Call* panel displays your current conference and allows you to manage your conference calls. You can only be involved in one conference call at a time.



Figure 16 Conference Call Panel

The header bar contains various controls that allow you to manage the conference:

- Hold Conference button – This allows you to place the conference on hold.
- Resume Conference button – This allows you to resume a held conference.
- Leave Conference button – This allows you to leave the conference.
- End Conference button – This allows you to end the conference.

The panel lists the call legs that make up your current conference. Each two-way call is displayed on a separate line. The information displayed for each call leg is the same as the information displayed for a two-way call. For information, see section [4.2.3 Current Calls](#).

#### 4.2.5 Call States and Actions

The following table lists the possible call states and actions that can be performed in each state.

| Call State             | Display Name   | Display Icon | Call Personality | Call Actions                                  |
|------------------------|----------------|--------------|------------------|---|
| Ringing In (Local)     | Incoming Local |              | Click-To-Dial    | Answer, End                                   |
| Ringing In (Remote)    | Incoming       |              | Terminator       | Answer, Conference, End                       |
| Ringing Out, Outgoing  | Outgoing       |              | Originator       | Conference, End                               |
| Active                 | Active         |              | Any              | Transfer, Hold, Park, Camp, End, Conference   |
| On Hold                | Held           |              | Any              | Transfer, Resume, Park, Camp, End, Conference |
| On Hold (Remote)       | Remote Held    |              | Any              | Transfer, Hold, End, Conference               |
| Active (In Conference) | Active         |              | Conference       | Transfer, Hold, End                           |

| Call State                 | Display Name  | Display Icon | Call Personality | Call Actions            |
|----------------------------|---------------|--------------|------------------|-------------------------|
| Held (In Conference)       | Held          |              | Conference       | Resume, Transfer, End   |
| Ringing In (Recalled Call) | Recalled      |              | Terminator       | Answer, Conference, End |
| Parked Call                | Parked (<DN>) |              | Any              | Answer, End             |

### 4.3 Contacts Pane

The *Contacts* pane contains your contact directories and allows you to use your contacts to make or manage calls. For information on using contacts to manage calls, see section [5 Manage Calls](#). For information about organizing and managing your contact directories, see section [7 Manage Contacts](#).

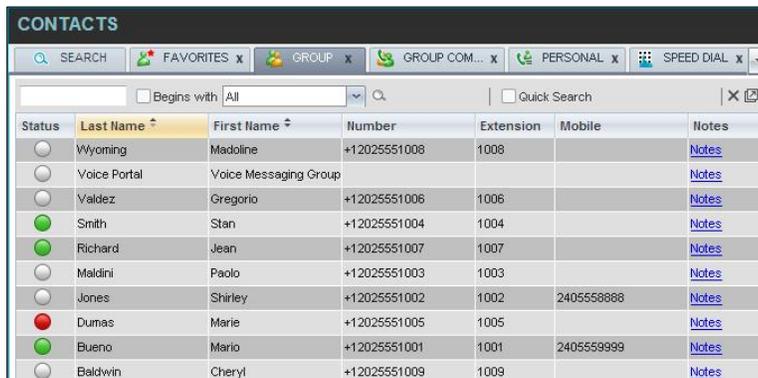


Figure 17 Receptionist Enterprise Contacts Pane

The *Contacts* pane contains the following elements:

- [Directory Management Bar](#)
- [Directories List](#)
- [Search Tab](#)
- [Favorites Tab](#)
- [Group/Enterprise Tab](#)
- [Group/Enterprise Common Tab](#)
- [Personal Tab](#)
- [Speed Dial Tab](#)
- [Queues Tab](#)
- [Custom Directories Tab](#)
- [Outlook Tab](#)
- [Search Results Tabs](#)

The *directories* tabs available to you depend on your Receptionist, system configuration, as well as the services assigned to you. For information, see section [2 Introduction to Receptionist](#) or see your administrator.

You can only see the contents of one directory at a time. The information displayed for a contact depends on the directory and is specified in the following subsections.

When you click a contact in any contact directory, the contact expands and information about the contact appears as well as the action buttons for the operations that you can currently perform on that contact.

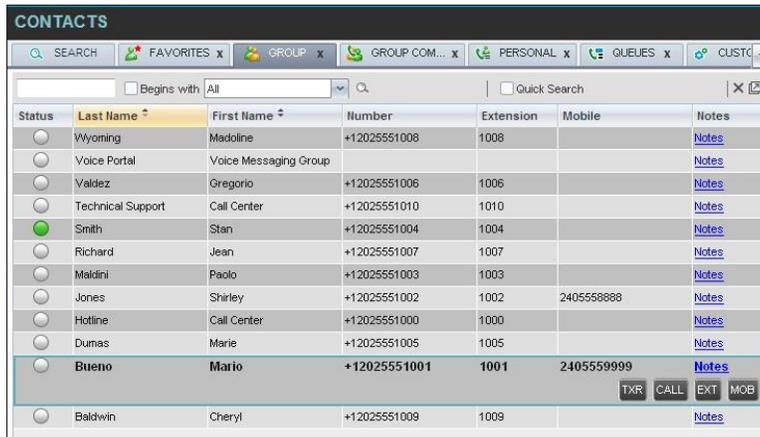


Figure 18 Group Tab – Contact in Focus with Action Buttons

For the list of action buttons available in Receptionist, see section [4.5.1 Call Action Buttons](#).

### 4.3.1 Directory Management Bar

The *Directory Management* bar contains controls that allow you to perform search operations, create new directories from search results, and edit directories, and group queues.



Figure 19 Directories Management Bar

### 4.3.2 Directories List

The drop-down arrow  to the right of the directories tabs, when clicked, displays the list of directories available to you, and allows you to select directory tabs to display in the *Contacts* pane. For more information, see section [7.1 Show/Hide Directories](#).

### 4.3.3 Search Tab

You use the *Search* tab to look for specific contacts in all your contacts directories. For information on performing directory searches, see section [7.3 Search Contacts](#).

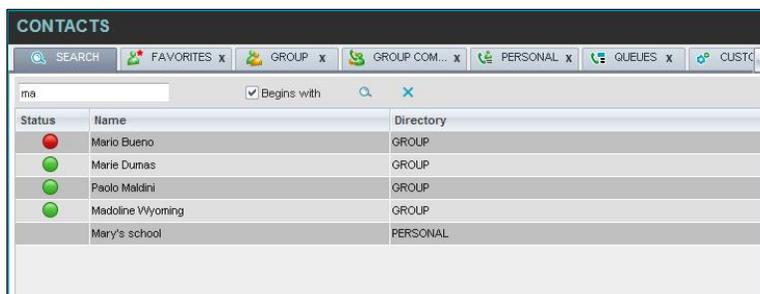


Figure 20 Contacts Pane – Search Tab

#### 4.3.4 Favorites Tab

You use the *Favorites* tab to monitor the phone state of selected contacts. The *Favorites* directory provides the following information for each contact: call state, last and first name, phone number, extension, mobile number, and link to notes.

The contacts to monitor must be configured on the web portal. This is referred to as static monitoring. For more information, see section [8 Monitor Contacts](#).

| Status | Last Name | First Name | Number       | Extension | Mobile     | Notes                 |
|--------|-----------|------------|--------------|-----------|------------|-----------------------|
|        | Bueno     | Mario      | +12025551001 | 1001      | 2405559999 | <a href="#">Notes</a> |
|        | Dumas     | Marie      | +12025551005 | 1005      |            | <a href="#">Notes</a> |
|        | Richard   | Jean       | +12025551007 | 1007      |            | <a href="#">Notes</a> |

Figure 21 Contacts Pane – Favorites Tab

#### 4.3.5 Group/Enterprise Tab

The *Group/Enterprise* tab contains the contacts in your group directory (if your group is part of a service provider) or enterprise directory (if your group is part of an enterprise). However, if your enterprise administrator restricted your access to your enterprise directory, you can only see the contacts from your group directory.

The following information is displayed for each contact: call state, last and first name, phone number, extension, mobile number, and link to notes.

If you have the Receptionist Enterprise, you can also monitor selected contacts and view contact details. This is referred to as dynamic monitoring. For information, see section [8.2 Dynamic Monitoring](#).

| Status | Last Name    | First Name            | Number       | Extension | Mobile     | Notes                 |
|--------|--------------|-----------------------|--------------|-----------|------------|-----------------------|
|        | Wyoming      | Maddie                | +12025551008 | 1008      |            | <a href="#">Notes</a> |
|        | Voice Portal | Voice Messaging Group |              |           |            | <a href="#">Notes</a> |
|        | Valdez       | Gregorio              | +12025551006 | 1006      |            | <a href="#">Notes</a> |
|        | Smith        | Stan                  | +12025551004 | 1004      |            | <a href="#">Notes</a> |
|        | Richard      | Jean                  | +12025551007 | 1007      |            | <a href="#">Notes</a> |
|        | Maldini      | Paolo                 | +12025551003 | 1003      |            | <a href="#">Notes</a> |
|        | Jones        | Shirley               | +12025551002 | 1002      | 2405558888 | <a href="#">Notes</a> |
|        | Dumas        | Marie                 | +12025551005 | 1005      |            | <a href="#">Notes</a> |
|        | Bueno        | Mario                 | +12025551001 | 1001      | 2405559999 | <a href="#">Notes</a> |
|        | Baldwin      | Cheryl                | +12025551009 | 1009      |            | <a href="#">Notes</a> |

Figure 22 Contacts Pane – Group Tab

#### 4.3.6 Group/Enterprise Common Tab

The *Group/Enterprise Common* tab contains the contacts in your group's common phone list (if your group is part of a service provider) or your enterprise's common phone list (if your group is part of an enterprise) configured by your administrator on the Hosted VoIP Phone System Admin Portal.

The contact's name and phone number are displayed for each contact.

| Name                   | Number     |
|------------------------|------------|
| Best Italian Takeout   | 2024124333 |
| Favorite Taxi          | 2029999999 |
| Help Desk              | 2024444444 |
| Human Resources        | 2407845571 |
| Lucky Travel           | 2021212121 |
| Supervisor On Call     | 2025551111 |
| Weekly Conference Call | 3429567555 |

Figure 23 Contacts Pane – Group Common Tab

### 4.3.7 Personal Tab

The *Personal* tab contains the contacts from your personal phone list on the Hosted VoIP Phone System User portal. The contact's name and phone number are displayed for each contact.

You can edit your personal contacts in Receptionist. For information about managing your personal contacts, see section [7.5 Manage Personal Contacts](#).

| Name             | Number     |
|------------------|------------|
| Antoine - mobile | 9354495495 |
| dr. Frank        | 4539506334 |
| Jim              | 2025467897 |
| Mary-Ann         | 3031314156 |

Figure 24 Contacts Pane – Personal Tab

### 4.3.8 Speed Dial Tab

The *Speed Dial* tab displays your Speed Dial 8 and Speed Dial 100 contacts. It is available to users who have been assigned Speed Dial 8 and/or Speed Dial 100 services. If you only have one of these services, you only see the contacts for that service in your Speed Dial directory. The speed code, phone number, and description are displayed for each contact.

You can edit your speed dial entries in Receptionist. For information about managing your speed dial entries, see section [7.6 Manage Speed Dial Entries](#).

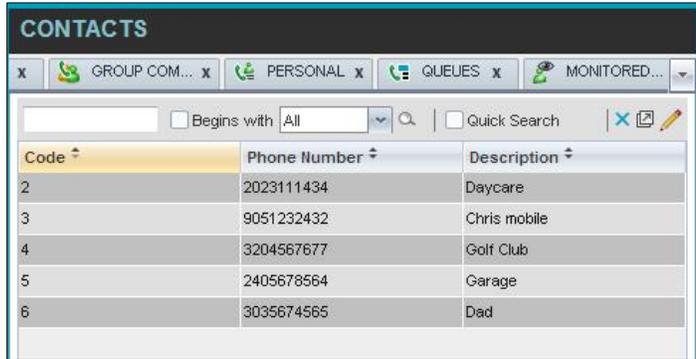


Figure 25 Contacts Pane – Speed Dial Tab

#### 4.3.9 Queues Tab

The *Queues* tab displays the list of call centers and associated DNIS numbers that a call center agent or supervisor is staffing and/or supervising. The primary purpose of this directory is to provide you with a quick way to transfer calls to queues. The call center/DNIS name, phone number, and extension are displayed for each contact.

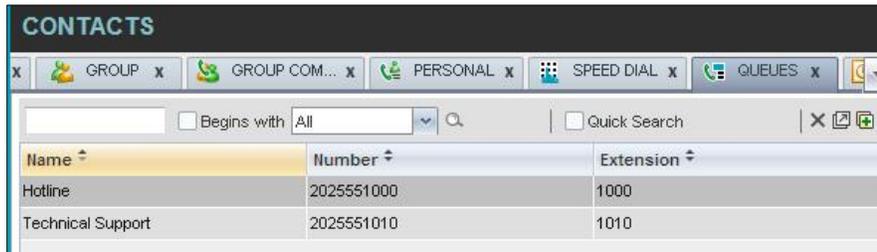


Figure 26 Contacts Pane – Queues Tab

#### 4.3.10 Custom Directories Tab

If your administrator has configured custom contact directories for your group, you can access them from Receptionist.

**NOTE:** A custom directory has the same properties as the *Group/Enterprise* directory, and you can perform the same operations on contacts in a custom directory as in the *Group/Enterprise* directory.

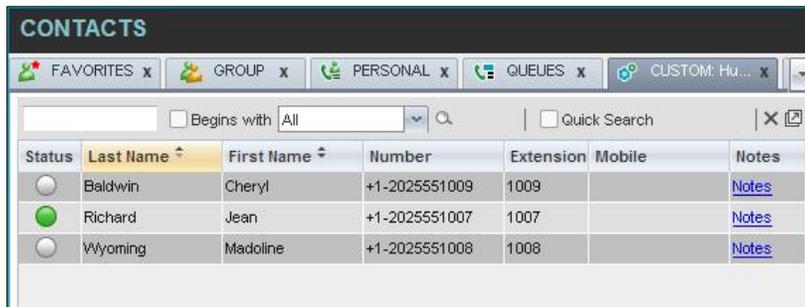


Figure 27 Contacts Pane – Custom (Directory) Tab

### 4.3.11 Outlook Tab

The *Outlook* tab contains your Outlook contacts. This tab is available to you if you have the Outlook Integration service enabled and configured. The contact's last and first name, phone number, mobile number, and home phone number are displayed for each contact. For more information, see section [12.4 Settings – Plug-ins](#).

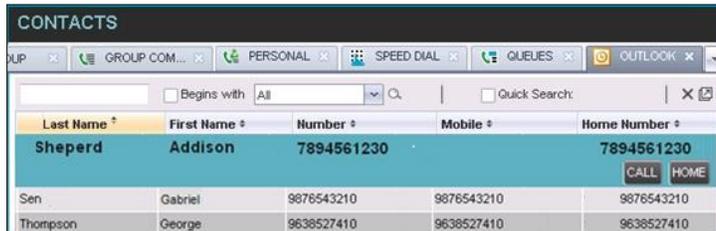


Figure 28 Contacts Pane – Outlook Tab

**NOTE: If Outlook contacts are not loading, log out of Receptionist and clear your browser’s cache. Then log back into Receptionist and then refresh the page.**

### 4.3.12 Search Results Tabs

When you search a directory on a single field, you can pull out the results and save them in a new contacts directory. The name of the new directory is the same as the name of the directory on which the search was performed, but the icon on the directory tab has an arrow similar to the arrow



used on shortcut icons. When you place the mouse over the tab for a directory created from search results, a ToolTip appears displaying the name of the original directory, followed by the search string that was used to create the directory, the two separated by a colon “:”, for example, “Group:ma”.

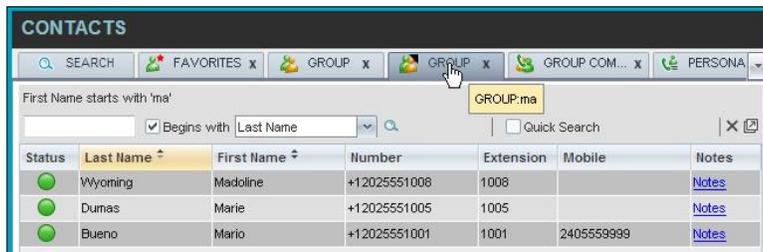


Figure 29 Contacts Pane – Search Results Tab

**NOTE:** A directory created from search results has the same properties as the original directory, and you can perform the same operations on it as on the original directory.

You can also perform a search on a directory created from search results and pull out the results into another tab.

Search results directories are only available for the current sign-in session. Also, once closed, they cannot be restored. If required, perform the same search again.

#### 4.4 Queued Calls Pane

You use the *Queued Calls* pane to manage queued calls in the selected call centers. For more information about managing queued calls, see section [10 Manage Queued Calls](#).



Figure 30 Queued Calls Pane

The pane lists queued calls for the selected call centers. For information on selecting call centers to display, see section [10.1 Select Call Centers to Manage](#).

Each call center is displayed in a separate panel. The panel's header displays the following information:

- The name of the call center.
- The primary phone number of the call center.
- The number of calls currently displayed for the queue against the maximum number of calls that can be displayed for a queue.
- The number of calls in queue against the queue length.

When you expand the panel for a call center, the list of calls queued in that call center appears, with calls listed according to their position in the queue.



Figure 31 Queued Calls Pane – Call Center Panel (Expanded)

The following information is provided for each call:

- Call Status icon – A graphic representation of the state of the queued call, which can be one of the following:

- *Waiting* – The call is queued, waiting to be answered.
- *Announcement* – An announcement is being played to the caller.
- *Reordered* – The position of the call in the queue has been changed.

- *Bounced*  - The call has been bounced.
- Name (if available) and phone number of the calling party.
- The total call time, including the time in the current priority bucket (in parentheses).

Clicking a call expands the call to show additional data:

- Position of the call in the queue.
- Priority of the call.
- The name (if available) and the phone number of the call center (or DNIS, if applicable) that was called.

When you move the mouse over a queued call, the action buttons that can be applied to the call appear. For information, see section [4.5.1 Call Action Buttons](#).

## 4.5 Controls

Receptionist controls are designed in a contextual manner, that is, most controls appear only when the action they represent can be taken. For example, when you select a call and enter a number or select a contact, the Transfer button appears, allowing you to transfer the call. The controls that correspond to call operations, such as Dial, Transfer, or Hold are called action buttons. They are described in section [4.5.1 Call Action Buttons](#).

The following table lists the general controls used in Receptionist and the controls displayed on the header bars of windows and panels.

**NOTE: Some options may not appear depending on the configuration of your organizations Receptionist.**

| Name  | Description   |
|---|---|
| <b>Common Controls</b>  |   |
|  Options         | This allows you to organize items in lists.                       |
|  Expand/Collapse | This shows or hides the contents of a window or panel.            |
|  Close           | This closes an interface element, such as window, pane, or panel. |
|  Edit            | This allows you to edit contacts in some directories.             |
| <b>Call Console Controls</b>  |   |
|  Call History    | This displays your call logs.                                     |
|  Call Waiting    | This allows you to turn Call Waiting on or off.                   |
|  Auto Answer     | This automatically answers your incoming calls.                   |
|  End Conference  | This ends a conference call.                                      |

| Name                                   | Description   |
|--|---|
| Leave Conference                       | This allows you to leave the conference while allowing other participants to continue the call.             |
| Hold Conference                        | This places a conference call on hold.  |
| Resume Conference                      | This resumes a held conference.   |
| Web Pop URL                            | This opens a page in your browser at the configured URL to provide additional information about the caller. |
| Pullout                                | This places the results of a search performed on a contacts directory in a new tab.                         |
| Clear                                  | This clears the search and displays the entire directory.   |
| Group Queues                           | This groups queues in the Queues tab by call center.  |
| <b>Call Notification Pop-up Window</b> |   |
| Web Pop URL                            | This opens a page in your browser at the configured URL to provide additional information about the caller. |
| vCard                                  | This saves the caller's phone number and personal information as a vCard in Microsoft Outlook.              |
| Transfer to Voice Mail                 | This transfers an incoming call to your voice mail.   |

#### 4.5.1 Call Action Buttons

Action buttons allow you to perform actions on calls, such as answering or transferring a call, or actions that result in a call being placed, such as dialing a number or contact. They appear on the Dialer, a call line, a call history log, or a directory entry.

Action buttons are contextual, that is, they appear on a line/entry when you move the mouse over that entry and when the corresponding action can be performed on that entry.

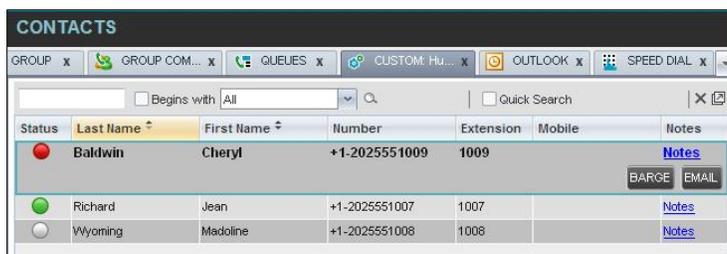


Figure 32 Custom Contacts Directory – Contact in Focus with Action Buttons

The following table lists action buttons available in Receptionist. Some buttons may not appear depending on your organization's Receptionist console configuration.

| Button | Description  |
|--------|--|
| Dial   | This dials the number you entered in the <i>Dialer</i> . |

| Button   | Description  |
|--|--|
|  CALL                         | This places a call to the selected contact or to a number from Call History.   |
|  Redial                       | This redials the last dialed number.   |
|  EXT<br>Extension             | This dials the contact's extension.  |
|  MOB<br>Mobile                | This dials the contact's mobile number.  |
|  EMAIL<br>E-mail              | This brings up a new e-mail message window with the contact's e-mail address, allowing you to send an e-mail to the contact. |
|  Transfer                     | This transfers a call to an ad hoc number entered in the Dialer.   |
|  TXR<br>Transfer              | This transfers a call to a selected number or contact.   |
|  VM<br>Transfer to Voice Mail | This transfers a call to the selected contact's voice mail.  |
|  ANS<br>Answer                | This answers an incoming call, answers an unanswered call for a contact, or resumes a held call.                             |
|  HOLD<br>Hold                 | This places a call on hold.  |
|  END<br>End                  | This ends a call.  |
|  CONF<br>Conference         | This establishes a conference call or adds a call to a conference.   |
|  CAMP<br>Camp               | This camps the call on a busy contact.   |
|  BARGE<br>Barge In          | This barges in on a contact's call.  |
|  PARK<br>Park               | This parks a call on a contact.  |
|  PROMOTE<br>Promote         | This promotes a selected call to the next higher priority bucket.  |
|  RETRIEVE<br>Retrieve       | This retrieves a selected call from the queue to the supervisor's device.  |
|  REORDER<br>Reorder         | This changes a selected call's position in the queue.  |
|  Web Pop URL                | This opens a page in your browser at the configured URL to provide additional information about the caller.                  |
|  Delete Call Log            | This deletes a call log from Call History.   |

## 5 Manage Calls

This section includes information and procedures on how to manage current calls. You use the *Call Console* to view and manage your current calls.



Figure 33 Call Console

### 5.1 Drag and Drop Call onto Contact

For operations on calls that involve a contact, you can drag a call from the *Call Console* and drop it on a target contact in one of your contacts directories. This provides you with a quick way to perform operations on calls that involve a contact.

As the call is dragged, a green arrow appears. By default, when the call is dropped onto a contact, no action is taken on the call. The target contact expands and you can select the action button for the operation you want to perform on that call.

However, you can enable automatic call transfer on *Drag and Drop* (if available). If automatic transfer is enabled, the call is transferred to the contact's phone number when you drop the call on the contact. For more information, see section [12.1.6 Drag and Drop](#).

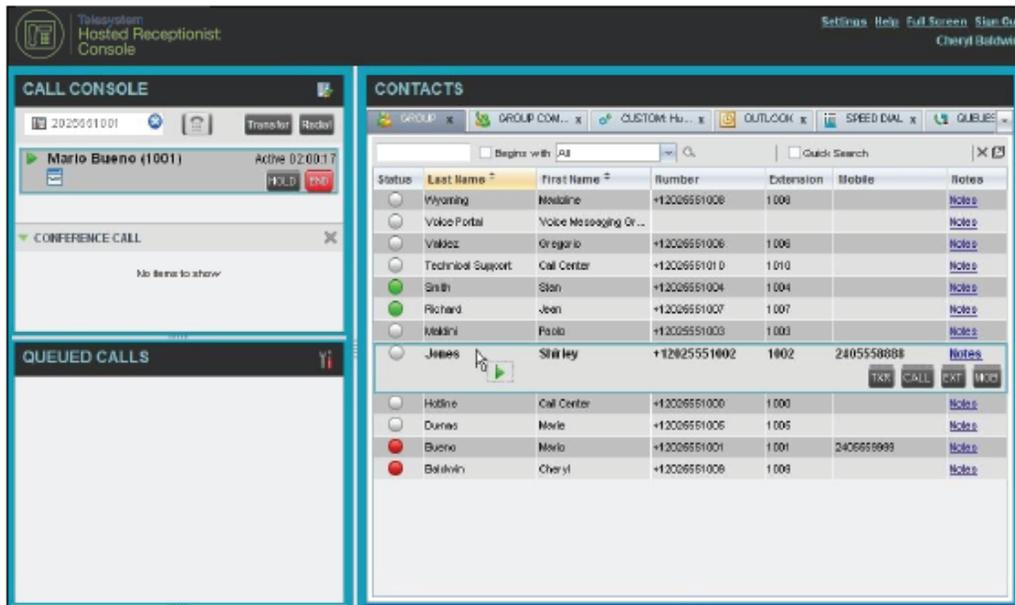


Figure 34 Dragging Call and Dropping it on Contact

## 5.2 View Call Information

Call information is provided in the *Call Console* and in the *Call Notification* pop-up window that appears on top of the system tray for incoming calls.

**NOTE: If the *Call Notification pop-up window* is not appearing, try updating the Java installed on the local computer.**

### 5.2.1 View Current Calls

Your current calls are always visible in the *Call Console*.

To view your conference call:

In the *Conference Call* panel, click the **Expand** button .

### 5.2.2 View Incoming Call Details

If the *Call Notification* feature is enabled in the settings, a *Call Notification* pop-up window appears on top of the system tray when an inbound call is received.

- **Direct inbound calls** – For calls to your direct number or extension, the following information is displayed:
  - Calling party name
  - Calling party number



Figure 35 Call Notification Pop-up Window for Non-ACD Call

- **Calls from a call center** – For calls from a call center, the call center name is displayed in addition to the caller's name and phone number.

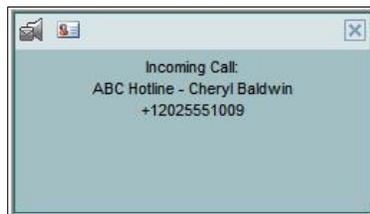


Figure 36 Call Notification Pop-up Window – Call from Call Center

- In addition, for diverted calls, that is, calls that were forwarded or transferred before being delivered to you, the diversion information is displayed.



Figure 37 Call Notification Pop-up Window with Diversion Information

**NOTE 1:** You must have only one tab open in the browser running Receptionist to receive call notifications.

**NOTE 2:** If calls come within eight seconds of each other, the *Call Notification* pop-up window only appears for the first call of that series.

### 5.2.3 Save vCard

When you receive a call, a *Call Notification* pop-up window is visible on top of the system tray. From this window, you can save the caller's phone number and personal information as a vCard in Microsoft Outlook.

**To save caller's information as a vCard:**

In the *Call Notification* pop-up window, click the **Add vCard** button .

This button is present only when Outlook is running.

**NOTE:** If you are having trouble with the pop-up window not displaying you may require a **Java update**.

### 5.2.4 Open URL

For any current call, you can open a page in your browser that contains information about the calling party encoded in its URL.

This can be done either from the *Call Notification* pop-up window that appears on top of the system tray for an incoming call or from the *Call Console* for any current call.

This feature is configured on the *Settings – General* configuration page. For more information, see section [12.1 Settings – General](#).

**To open a URL for the incoming call:**

In the *Call Notification* pop-up window, click the **Web Pop URL** button .

**To open a URL for any call:**

In the *Call Console*, click the **Web Pop URL** button  for the target call.

## 5.3 Answering Calls

You can answer your own incoming calls and calls for other users in your group. If you have the Auto Answer service, you can also answer calls automatically.

### 5.3.1 Answer Call

Your incoming calls appear in the *Call Console*. To answer a call, the call state must be *Incoming*.

**To answer an incoming call:**

Move the mouse over the call and click **Answer** . The call state changes to *Active*.

**NOTE:** Double-clicking a call, does not answer it.

**To answer an incoming call from a Call Notification pop-up window:**

Click anywhere on the text in the window.

**To answer calls automatically:**

In the *Call Console*, click the **Auto Answer**  button. The button changes to this  to indicate that Auto Answer is on.

When Auto Answer is enabled, your phone automatically goes off-hook when it is alerted. This applies to both inbound and Click-To-Dial calls.

The Auto Answer feature may be enabled manually in the client or by the administrator on the server.

**NOTE:** If this feature is enabled by your administrator, you must **not** enable the client-based Auto Answer using the Auto Answer button.

### 5.3.2 Pick Up Call

The Directed Call Pickup service allows you to answer a call that is incoming to another user. Depending on your setup, you can answer calls for users in your group or in the entire enterprise. This is useful when the user is currently not on hand to answer the call.

**NOTE:** To pick up a contact's call, you need to have the Directed Call Pickup service assigned.

**To answer a call for a contact:**

- 1) Click your *Group/Enterprise* or *Favorites* tab to display its contents and click the target contact to expand it. The contact's state must be *Ringling*.
- 2) Move the mouse over the contact and click **Answer** .  
The call appears as *Incoming* in the *Call Console*.

## 5.4 Hold and Resume Calls

You can only put an active call on hold.

### 5.4.1 Put Call on Hold

**To put a call on hold:**

Move the mouse over the call and click **Hold** .

### 5.4.2 Resume Held Call

**To resume a held call:**

Move the mouse over the call and click **Answer** .

**NOTE:** Double-clicking a call does not take the call off hold.

## 5.5 Make and End Calls

Receptionist provides you with several ways in which you can make calls. When you dial a number or contact, the call appears in the *Call Console* as *Incoming Local*.

### 5.5.1 Dial Ad Hoc Number

You use the *Dialer* to place a call to an ad hoc number.



Figure 38 Dialer

**To dial an ad hoc number:**

- 1) In the *Dialer*, enter the phone number and click **Dial** . The call appears in the *Call Console* as *Incoming Local* and your phone rings.
- 2) Click **Answer**  for that call. An outbound call is placed and the call state changes to *Outgoing*.

### 5.5.2 Redial Number

Receptionist keeps up to the ten most recently dialed numbers.

**To redial one of the recently dialed numbers:**

- 1) In the *Dialer*, place the cursor in the text box and start entering a number. A list of recently called numbers that start with the entered digits appears.

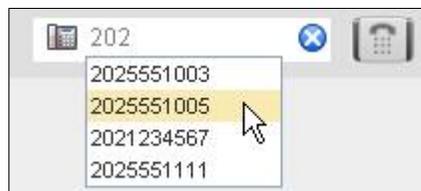


Figure 39 Dialer – Select Recently Dialed Number

- 2) Select the number to dial and click **Dial** .

The client issues a Click-To-Dial attempt to the selected number.

Alternatively, click the **Redial** button and select the number from the list that appears.

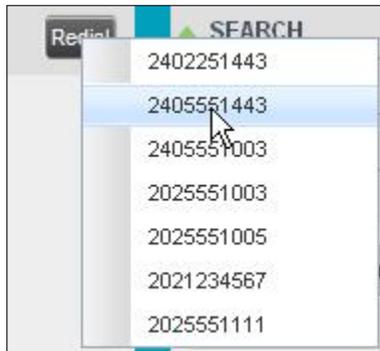


Figure 40 Dialer – Redialing Number

### 5.5.3 Dial Contact

You can dial contacts from any directory available in Receptionist.

**To dial a contact:**

- 1) In the *Contacts* pane, click the tab for the directory from which you want to dial a contact.
- 2) Click the contact to expand it and click **Call** for that contact. A Click-To-Dial action is initiated and your phone rings.



Figure 41 Group Tab – Contact in Focus with Transfer, Call, Extension, and Mobile Buttons

- 3) Answer the phone. An outbound call is placed.
- 4) Alternatively, to dial the contact’s extension, click **Extension** or to dial the contact’s mobile number, click **Mobile** .

### 5.5.4 Speed Dial

**To speed dial a contact:**

- 1) In the *Contacts* pane, click the *Speed Dial* tab to display its contents.
- 2) Click the contact to expand it and click **Call** .

### 5.5.5 Dial from History

You can dial any number that is available in Call History.

**To dial from Call History:**

- 1) In the *Call Console*, click the **Call History** button . The *Call History* dialog box appears.

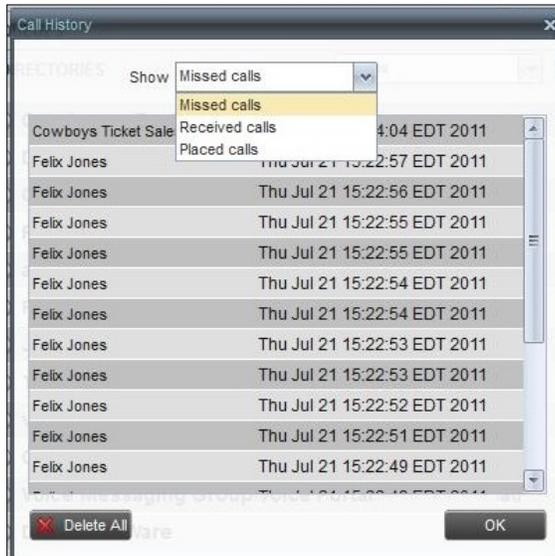


Figure 42 Call History Dialog Box

- 2) From the *Show* drop-down list, select the grouping you want.
- 3) Scroll through the list of call logs to find the entry you need.
- 4) Click the entry to expand it and click **Call** .

## 5.6 End Call

To end a call:

Click **End**  for that call.

**NOTE:** If the call has not yet been answered, the calling party continues to ring until no answer or another applicable timer expires or the user hangs up.

## 5.7 Transferring Calls

There are a number of ways in which you can transfer a call. You can blind transfer calls or transfer calls with consultation or supervision. You can also transfer calls directly to voice mail or to a queue.

### 5.7.1 Blind Transfer Call

A blind transfer occurs when a call is transferred without an introduction. Calls may be blind transferred while active, held, or ringing (in) on your phone. If a call is ringing (in), blind transfer allows the call to be redirected before it is answered. You can blind transfer a call to an ad hoc number or to a contact.

To blind transfer a call to an ad hoc number:

- 1) In the *Call Console*, select the call to transfer.
- 2) In the *Dialer*, enter the destination number and click **Transfer** . The call is transferred and removed from the *Call Console*.

**To blind transfer a call to a contact:**

- 1) In the *Call Console*, select the call to transfer.
- 2) In the *Contacts* pane, click the tab from which you want to select a contact.
- 3) Click the destination contact to expand it, and click **Transfer**  for that contact. The call is transferred and removed from the *Call Console*.

Alternatively, drag the call onto the target contact and click **Transfer**  for that contact.

**5.7.2 Conduct Supervised Transfer**

When you have an active inbound call that you want to transfer, you can follow this procedure.

**To conduct a supervised transfer:**

- 1) In the *Call Console*, select the call to transfer.
- 2) Dial the number or contact to whom you want to transfer the call.
- 3) If the dialed contact is busy, either retry or dial another contact.
- 4) Move the mouse over the new, non-selected call and click **Transfer** .

**5.7.3 Transfer with Consultation**

Use this method to transfer a call with an introduction to the destination party. Calls may be transferred this way while active, held, or ringing (in) on your phone. In the latter case, the system redirects the call before it is answered.

**To transfer a call with consultation:**

- 1) Make a call to the person to whom you want to transfer the call. If the first call was active, it is put on hold. The new call appears in the *Call Console*.
- 2) Wait until the called party accepts your call and speak to the party.
- 3) When ready to transfer, in the *Call Console*, select one of the two calls.
- 4) Move the mouse over the non-selected call and click **Transfer** .

The calls are connected and removed from the *Call Console*.

**5.7.4 Transfer to Voice Mail**

You can transfer a call to a monitored contact's voice mail or to your own voice mail. Calls may be transferred while active, held, or ringing (in) on your phone.

**To transfer a call to voice mail:**

- 1) In the *Call Console*, select the call to transfer.
- 2) In the *Contacts* pane, click the *Group/Enterprise* or *Favorites* tab to display its contents and find the target contact. Find yourself if you want to transfer the call to your voice mail.
- 3) Click the contact and click **Transfer to Voice Mail**  for that contact.

Alternatively, drag the call onto the target contact and click **Transfer to Voice Mail**  for that contact.

**NOTE:** This option is only available if the contact has the Voice Messaging service assigned and enabled.

You can also transfer an incoming call to voice mail from the *Call Notification* pop-up window.

**To transfer an incoming call to your voice mail:**

In the *Call Notification* pop-up window that appears when you receive a call, click **Transfer to**

**Voice Mail** .

### 5.7.5 Transfer to Queue

You can transfer a current call to any queue that appears in your *Queues* directory. The call is placed at the bottom of the new queue.

**To transfer a call to a queue:**

- 1) In the *Call Console*, select the call to transfer.
- 2) Click the *Queues* tab to display the available queues.
- 3) Click the destination queue and click **Transfer** .

The call is transferred and removed from the *Call Console*.

Alternatively, drag the call onto the target queue and click **Transfer**  for that queue.

## 5.8 Parking and Camping Calls

Call parking or camping allows you to find a temporary parking place for the call. If the parked or camped call is not answered within the predefined time, the call is recalled and reappears in your *Call Console*.

### 5.8.1 Conduct Busy Camp On

Busy Camp On allows you to place a call on a busy contact. The call is automatically transferred to the destination when the contact becomes available to take the call. A call to camp must be active or held, and the destination contact must be either *Busy* or *Ringling*.

**NOTE:** To use the feature, you need to have the Busy Camp On service assigned and active.

**To camp a call on a busy contact:**

- 1) In the *Call Console*, select the call to camp.
- 2) In your *Group/Enterprise* or *Favorites* directory, click a *Busy* or *Ringling* contact and click **Camp** . Once the call is camped, it is removed from the *Call Console*.

If the call reaches the designated expiration timer before the call is answered, the call is recalled to your device and reappears in the *Call Console*.

### 5.8.2 Conduct Group Call Park

Group Call Park searches within a predefined hunt group for an available line on which to park a call. After a designated time, the call returns to the originating operator or a specified hunt group (depending on how the service is configured). If the parking attempt fails for any reason, the call remains in your *Call Console*.

#### To perform a Group Call Park:

In the *Call Console*, move the mouse over an active or held call and click **Park** . The call is parked on an available extension and removed from *the Call Console*.

If the call reaches the designated expiration timer before the call is answered, the call may be recalled to your device and reappear in your *Call Console*.

### 5.9 Manage Conference Calls

You manage your conferences in the *Call Console*.

- You use the top area of the *Call Console* to establish a conference and add participants to it.
- You use the *Conference Call* panel to manage or end an active conference.

You can only have one active conference at a time.



Figure 43 Call Console – Conference Call Panel

To conduct an N-Way conference you must first start a Three-Way conference and then add participants to it.

**NOTE:** To conduct a conference you must have the Three-Way Call or N-Way Call service assigned.

### 5.9.1 Start Three-Way Conference

To start a conference you need to have at least two current calls.

**To start a conference:**

- 1) If necessary, place calls to participants using any of the methods described in section [5.5 Make and End Calls](#).
- 2) In the *Call Console*, select one of the two calls.



Figure 44 Starting Conference

- 3) Move the mouse over the non-selected call and click **Conference** . A Three-Way Conference is established and the connected calls are moved to the *Conference Call* panel.

### 5.9.2 Add Participant to Conference

To perform this operation, you need to have the N-Way Call service assigned.

**To add participants to a conference:**

- 1) If the call you want to conference in is not yet established, place the call using any of the methods described in section [5.5 Make and End Calls](#).
- 2) In the *Call Console*, move the mouse over the call to add and click **Conference** . The caller is added to the conference.

### 5.9.3 Hold Conference

**To put an active conference on hold:**

In the *Conference Call* panel, click **Hold Conference** . This allows other conference participants to continue their conversation.

### 5.9.4 Resume Held Conference

**To resume a held conference:**

In the *Conference Call* panel, click **Resume Conference** . All the calls in the conference become active.

### 5.9.5 Put Conference Participant on Hold

To put a specific conference participant on hold:

- 1) Expand the *Conference Call* panel.
- 2) Move the mouse over the target call and click **Hold** .

### 5.9.6 Resume Conference Participant

To resume a conference participant:

- 1) Expand the *Conference Call* panel.
- 2) Move the mouse over the target call and click **Answer** .

### 5.9.7 Leave Conference

To leave the conference:

In the *Conference Call* panel, click the **Leave Conference**  button.

**NOTE:** This function is only available for Three-Way Conferences.

### 5.9.8 Remove Conference Participant

To end a selected call in the conference:

- 1) Expand the *Conference Call* panel.
- 2) Move the mouse over the call and click **End** .

### 5.9.9 End Conference

To end the conference:

In the *Conference Call* panel, click **End Conference** . This releases all the calls that participate in the conference.

### 5.9.10 Barge in on Call

Call Barge-in allows you to barge in on a contact's call. This is useful when you want to enter a call that is already established between two other people.

**NOTE:** This functionality is only available if you have been assigned this service by your administrator.

Depending on your setup, you can barge in on contacts in your group or enterprise.

To barge in on a call:

- 1) Click the *Group/Enterprise* or *Favorites* tab to display its contents.
- 2) Click the target contact and click **Barge In** . The contact's status must be *Busy*.  
You enter an ongoing call, thereby establishing a Three-Way Conference. The calls appear in the *Conference Call* panel.

Alternatively, drag the call onto the target contact and click **Barge In**  for that contact.

You can now perform any conference operation on the call.

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## 6 Message Contacts

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Receptionist allows you to send e-mail messages to contacts that have messaging configured in the system. You must also have the Messaging feature enabled within Receptionist. For information, see section [12.5 Settings – Messaging](#).

### 6.1 Send E-mail to Contact

**To send an e-mail message to a contact:**

- 1) In the *Group/Enterprise* or *Favorites* directory, click the contact that has an e-mail address configured.
- 2) Click the **E-mail** button  for the contact. This brings up a new e-mail window for the configured Messaging service.
- 3) Write your message and click **Send**.

## 7 Manage Contacts

Receptionist allows you to view, search, and organize your contact directories.

You use the *Contacts* pane to manage your contact directories, to monitor selected contacts, and to use your contacts to make or manage calls.

| Status                           | Last Name         | First Name            | Number       | Extension | Mobile     | Notes                 |
|----------------------------------|-------------------|-----------------------|--------------|-----------|------------|-----------------------|
| <input type="radio"/>            | Wyoming           | Madoline              | +12025551008 | 1008      |            | <a href="#">Notes</a> |
| <input type="radio"/>            | Voice Portal      | Voice Messaging Gr... |              |           |            | <a href="#">Notes</a> |
| <input type="radio"/>            | Valdez            | Gregorio              | +12025551006 | 1006      |            | <a href="#">Notes</a> |
| <input type="radio"/>            | Technical Support | Call Center           | +12025551010 | 1010      |            | <a href="#">Notes</a> |
| <input checked="" type="radio"/> | Smith             | Stan                  | +12025551004 | 1004      |            | <a href="#">Notes</a> |
| <input checked="" type="radio"/> | Richard           | Jean                  | +12025551007 | 1007      |            | <a href="#">Notes</a> |
| <input type="radio"/>            | Maldini           | Paolo                 | +12025551003 | 1003      |            | <a href="#">Notes</a> |
| <input checked="" type="radio"/> | Jones             | Shirley               | +12025551002 | 1002      | 2405558888 | <a href="#">Notes</a> |
|                                  |                   |                       |              |           |            | TXR CALL EXT MOB      |
| <input type="radio"/>            | Hotline           | Call Center           | +12025551000 | 1000      |            | <a href="#">Notes</a> |
| <input type="radio"/>            | Dumas             | Marie                 | +12025551005 | 1005      |            | <a href="#">Notes</a> |
| <input checked="" type="radio"/> | Bueno             | Mario                 | +12025551001 | 1001      | 2405559999 | <a href="#">Notes</a> |
| <input checked="" type="radio"/> | Baldwin           | Cheryl                | +12025551009 | 1009      |            | <a href="#">Notes</a> |

Figure 45 Contacts Pane

Your contact directories are displayed as tabs at the top of the *Contacts* pane, with the details of only one directory visible at any time. The information displayed about each contact depends on the directory you are viewing.

For the list of contact directories available in your version of Receptionist, see section [2 Introduction to Receptionist](#).

For information on monitoring contacts, see section [8 Monitor Contacts](#); for information on call-related functions, see section [5 Manage Calls](#).

This section describes the directories management functions provided by Receptionist.

- [Show/Hide Directories](#)
- [View Directory Content](#)
- [Search Contacts](#)
- [Make Notes About a Contact](#)
- [Manage Personal Contacts](#)
- [Manage Speed Dial Entries](#)

## 7.1 Show/Hide Directories

Receptionist allows you to specify which directory tabs should be visible in the *Contacts* pane.

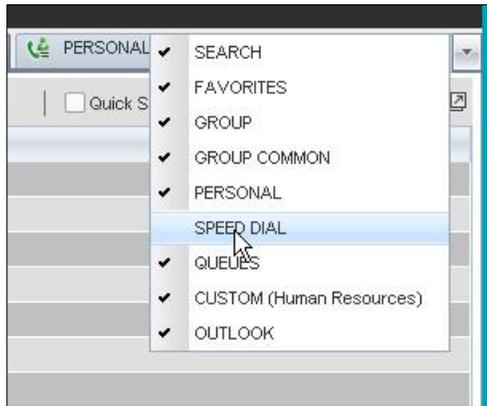


Figure 46 Contacts Pane – Expanded Options Menu

### To display a directory tab in the Contacts pane:

- 1) At the top right-hand side of the *Contacts* pane, click the drop-down arrow .
- 2) From the list that appears, select the directory to display. The directory tab is displayed at the top of the *Contacts* pane and its contents appear in the *Contacts* pane.

To remove a directory tab from the *Contacts* pane, click the **Close** button  on the tab for that directory.

Note that once you close a directory containing search results, you cannot display it again.

## 7.2 View Directory Content

### To view contacts in a directory:

In the *Contacts* pane, click the tab for that directory. The directory listing appears in the *Contacts* pane.

If the tab is not visible, click the drop-down arrow  to the right of the directories tabs and select the directory from the list that appears.

### To view additional information about a contact:

Click the contact to view. This expands the row for the contact displaying applicable action buttons and in some directories also the contact's calendar. For more information about the action buttons, see section [4.5.1 Call Action Buttons](#).

## 7.3 Search Contacts

Receptionist allows you to search for contacts several different ways. You can perform a search on a specific directory or on all directories at once. You can perform a quick search or a regular search, you can create a new directory from search results, and you can perform a search on search results.

To search for contacts, use the following procedures:

- [Perform Quick Search](#)

- Perform Regular Search
- Create Directory from Search Results
- Perform Search on Search Results

### 7.3.1 Perform Quick Search

Receptionist allows you to perform a quick search, which searches a specific column for entries that start with a character entered by you. The column on which the search is performed is the column by which the directory is currently ordered.

A quick search can be performed on any directory, except for the *Search* directory.

**NOTE:** The search is not case-sensitive; the search for “Ann” and “ann” returns the same results.

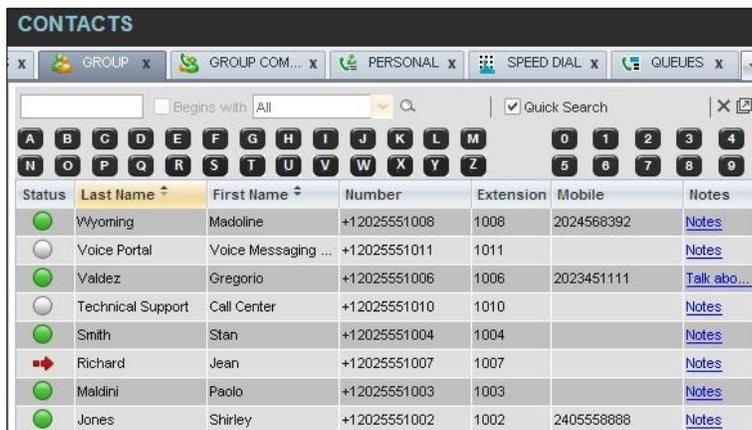


Figure 47 Contacts Pane – Performing Quick Search

#### To perform a quick search:

- 1) Click the directory tab where you want to perform the search.
- 2) Order the directory by the column that you want to search.
- 3) Check the *Quick Search* box.
- 4) From the keypad that appears, select a character (a single letter or digit) that you want to perform the search. The contacts that start with the selected character (in the selected column) are displayed in the directory.
- 5) To perform another search on the same column, select another character. The new search is performed on the original directory and not on the results of the previous search.

### 7.3.2 Perform Regular Search

You can search for contacts in a specific directory or in all directories at once.

When you search for contacts in a specific directory, you can search on a specific column or on all columns. When you use the Search tab, the search is performed on all directories and columns.

If you perform a second search on the same directory, the search is performed on the entire directory even if only search results are displayed. To search in search results, you first need to create a new directory from the results of the first search.

You use the controls located in the *Contacts* pane below the directories tabs to perform contact searches.

**NOTE:** The search is not case-sensitive; the search for “Ann” and “ann” returns the same results.

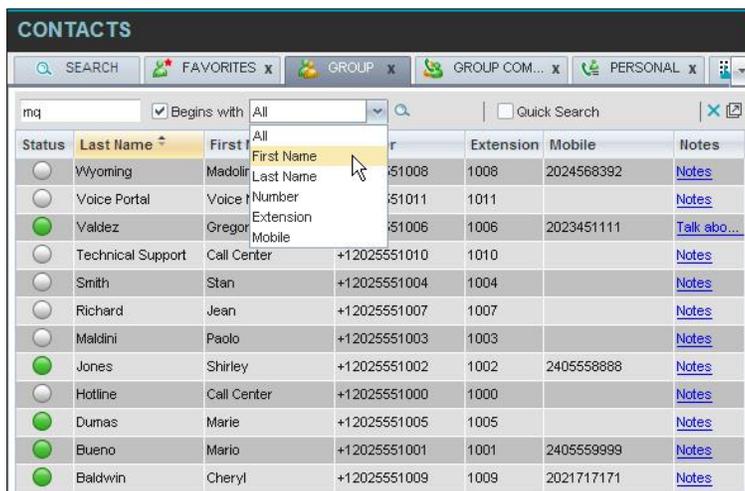


Figure 48 Contacts Pane – Performing Regular Search

#### To search in a specific directory:

- 1) Select the directory to search.
- 2) Make sure that the *Quick Search* box is unchecked.
- 3) In the *Search* text box, enter the text you want to search for. You can enter partial information, such as part of a name or phone number, but you must enter at least two characters.

For example, if you do not remember whether Mary’s last name is spelled “Shelley” or “Shelly”, you can enter “Shell”, and either name is returned.

- 4) To restrict the search to contacts that start with the entered string, check the *Begins with* box. Otherwise the search results will also include contacts that contain the entered string.
- 5) From the drop-down list, select the column to search by. You can select a specific column or all columns.

- 6) Click the **Search** button .

The text you entered is matched against the selected column (or all columns) of every entry of the selected directory. Search results are displayed in the tab where the search was performed.

Duplicate search results in directories are not displayed; the first match for a given contact is displayed.

Duplicate search results in other directories are displayed.

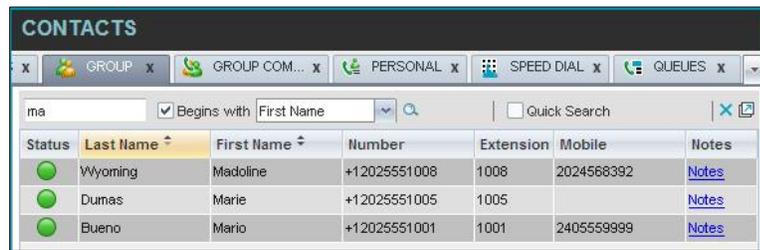


Figure 49 Contacts Pane – Search Results

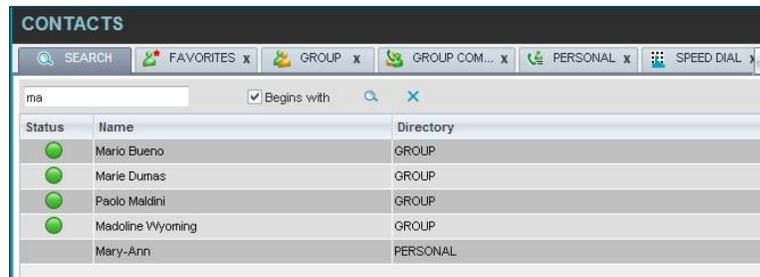


Figure 50 Contacts Pane – Search Results in the Search Tab

The search returns either all the contacts (in the selected directory) that contain the entered keyword or all the contacts that start with the entered keyword.

In the first case (*Begins with* not checked), entering “Ann” returns all contacts with the name “Ann”, but it also returns all contacts with names such as “Anne”, “Marianne”, “Marie Ann”, “Ann Marie”, and so on.

In the second case (*Begins with* checked), entering “Ann” returns all contacts with names such as “Ann”, “Anne”, and “Ann Marie”, but not “Marianne” or “Mary Ann”.

- To clear the search results, click **Reset**

**To search in all directories:**

- Click the **Search** tab.

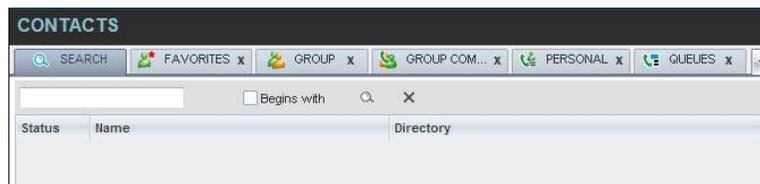


Figure 51 Performing Search Using Search Tab

- In the *Search* text box, enter the text you want to search for. You can enter partial information, such as part of a name or phone number, but you must enter at least two characters.

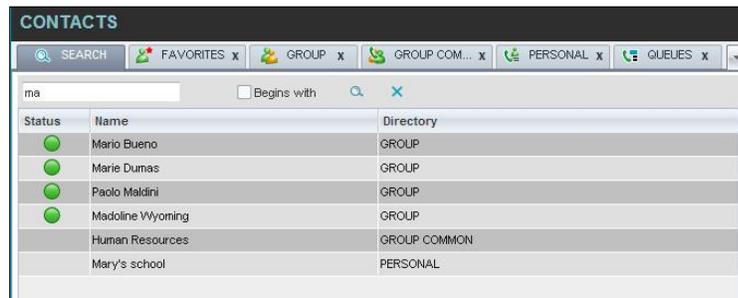
For example, if you do not remember whether Mary’s last name is spelled “Shelley” or “Shelly”, you can enter “Shell”, and either name is returned.

- To restrict the search to contacts that start with the entered string, check the *Begins with* box. Otherwise, the search results will also include contacts that contain the entered string.

- 4) Click the **Search** button .

The text you enter is matched against all columns in all directories (except for the *Notes* column). Search results are displayed in the Search tab.

Duplicate search results in directories are not displayed; the first match for a given contact is displayed. Duplicate search results in other directories are displayed.



| Status | Name             | Directory    |
|--------|------------------|--------------|
|        | Mario Bueno      | GROUP        |
|        | Marie Dumas      | GROUP        |
|        | Paolo Maldini    | GROUP        |
|        | Madoline Wyoming | GROUP        |
|        | Human Resources  | GROUP COMMON |
|        | Mary's school    | PERSONAL     |

Figure 52 Results of Search Performed in Search Tab

- 5) When you click a contact, the entry expands displaying contact details. The information depends on the directory that the contact was selected.

**NOTE:** Contact entries displayed in the Search tab follow the same rules as if that entry was accessed in its own directory. This allows you to perform any operations directly from the search results.

### 7.3.3 Create Directory from Search Results

When you perform a search in a specific directory, you can create a new directory from the search results, using the Pullout button. The button is enabled when a search is performed on a single field.

**NOTE:** The Pullout button is not available in the Search directory.

#### To create a directory from search results:

- 1) Select the directory where you want to perform the search.
- 2) Perform a quick search or a regular search on a single column.
- 3) When the results are displayed, click the **Pullout** button , which becomes active. A new tab is created containing the results of the search.

**NOTE:** Contact entries displayed in a search results tab follow the same rules as if that entry was accessed in its own directory. This allows you to perform any operations directly from the search results.

### 7.3.4 Perform Search on Search Results

If you perform a search in a specific directory, the search is always performed on the entire directory even if only search results are displayed. To search in search results, you first need to first create a new directory from the search results.

**To perform a search on search results:**

- 1) After you perform the original search, create a directory from the search results.
- 2) Perform a new search in the new directory.

**NOTE:** Searching within the search results cannot be performed on the same column that the original search was performed.

### 7.3.5 Order Directory Entries

Receptionist allows you to order directory entries in ascending or descending order. The columns that the directory can be ordered have the sort icon displayed  next to their name. The following table lists the directories and the columns by which they can be ordered.

| Directory               | Sort Columns   | Default Sort Column |
|-------------------------|--|---------------------|
| Enterprise/Group        | First Name, Last Name<br>Note that the Enterprise directory can only be sorted in ascending order. | Last Name           |
| Favorites               | Status, First Name, Last Name, Number, Extension, Mobile, Notes                                    | Last Name           |
| Group/Enterprise Common | Name, Number   | Name                |
| Personal                | Name, Number   | Name                |
| Speed Dial              | Code, Description, Number  | Code                |
| Queues                  | Name, Number, Extension  | Name                |
| Custom                  | First Name, Last Name  | Last Name           |
| Outlook                 | Last Name, First Name, Number, Mobile, Home Phone  | Last Name           |

Note that you cannot order the contacts in the Search tab.

The sorting order for the *Status* column is as follows from highest to lowest: Private, On a Call, Ringing, Away, In a Meeting, Call Forwarding Always, Do Not Disturb, and Available. For information on the different states, see section [13.1 Monitored User States](#).

**To order a directory:**

- 1) Click the header of the column that you want to order the directory.
- 2) To reverse the order, click the same column header again.

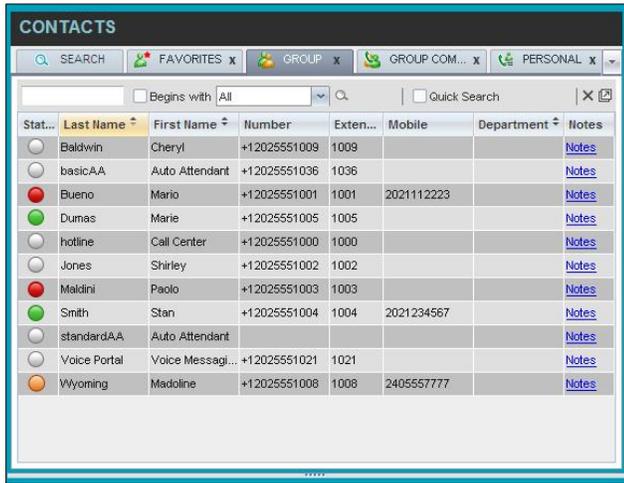


Figure 53 Sort Directory

The contacts in the selected directory are reordered based on the selected column. The sort order is saved on sign-out and preserved between sessions.

**7.4 Make Notes About a Contact**

Receptionist Enterprise allows you to make notes about the contacts in your *Group/Enterprise* and *Favorites* directories.

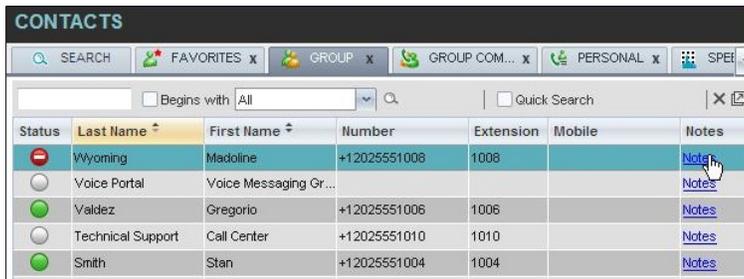


Figure 54 Group Directory – Contacts Notes

**To make a note about a contact:**

- 1) In the *Group/Enterprise or Favorites* directory, click the *Notes* link for a selected contact. The *Notes for <Contact Name>* dialog box appears.

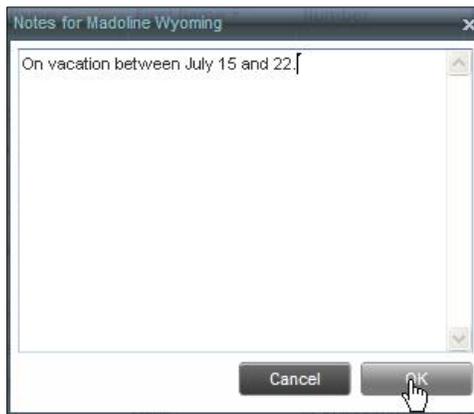


Figure 55 Notes for Madoline Wyoming Dialog Box

- 2) Enter the desired text, view or modify the existing text in the *Notes* text box.
- 3) To save your changes and close the dialog box, click **OK**.  
Or to close the dialog box without saving, click **Cancel**.

| Status | Last Name         | First Name            | Number       | Extension | Mobile | Notes                      |
|--------|-------------------|-----------------------|--------------|-----------|--------|----------------------------|
|        | Wyoming           | Madoline              | +12025551008 | 1008      |        | <a href="#">On vaca...</a> |
|        | Voice Portal      | Voice Messaging Gr... |              |           |        | <a href="#">Notes</a>      |
|        | Valdez            | Gregorio              | +12025551006 | 1006      |        | <a href="#">Notes</a>      |
|        | Technical Support | Call Center           | +12025551010 | 1010      |        | <a href="#">Notes</a>      |

Figure 56 Group Directory – Contact Notes

When there are notes for a contact, the beginning of the text of the notes followed by an ellipsis (...) is displayed for the Notes link instead of the word “Notes”.

## 7.5 Manage Personal Contacts

You can add or remove personal contacts via the web portal or in Receptionist, and the updates appear in both places. However, the updates that you make via the web portal appear in Receptionist at the next sign-in.

| Name             | Number     |
|------------------|------------|
| Antoine - mobile | 9354495495 |
| dr. Frank        | 4539506334 |
| Jim              | 2025467897 |
| Mary-Ann         | 3031314156 |

Figure 57 Personal Tab

You can perform the following operations on personal contacts:

- [Add Personal Contact](#)
- [Delete Personal Contact](#)

You cannot modify a personal contact entry in Receptionist. To modify information for a personal contact, delete the entry and add it again.

### 7.5.1 Add Personal Contact

To add a personal contact:

- 1) Click the *Personal* tab and then click **Edit** . The *Edit Personal Contacts* dialog box appears.
- 2) Click **Add**. A new line is added below the existing entries, allowing you to define a new entry.



Figure 58 Edit Personal Contacts Dialog Box – Add Entry

- 3) In the *Name* text box, enter the contact's name or description, as you want it to appear.
- 4) In the *Number* text box, enter the phone number of the contact.
- 5) To save the changes, click anywhere in the dialog box outside the entry.

### 7.5.2 Delete Personal Contact

To delete a speed dial entry:

- 1) Click the *Personal* tab and then click **Edit** . The *Edit Personal Contacts* dialog box appears.
- 2) Select the entry to delete and click **Delete**.

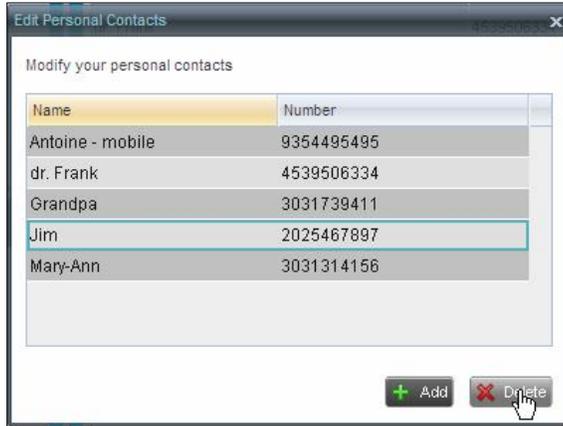


Figure 59 Edit Personal Contacts Dialog Box – Delete Entry

## 7.6 Manage Speed Dial Entries

This directory allows you to manage and use your Speed Dial 8 and Speed Dial 100 entries. To use this feature, you need to have Speed Dial 8 and/or Speed Dial 100 service assigned. If you only have one of these services, you see the entries for that service only in your *Speed Dial* tab.

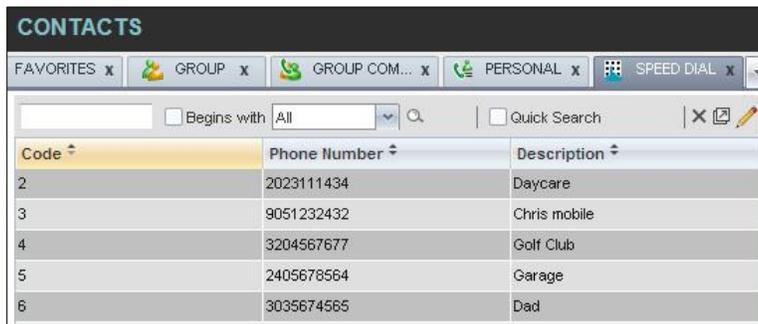


Figure 60 Speed Dial Tab

You can add or remove entries via the web portal or the Receptionist client, and the updates appear in both places. However, the updates that you make via the web portal appear only at the next sign-in to Receptionist.

To update speed dial entries using the client, perform the following operations:

- [Add Speed Dial Entry](#)
- [Modify Speed Dial Entry](#)
- [Delete Speed Dial Entry](#)

### 7.6.1 Add Speed Dial Entry

To add a speed dial entry:

- 1) Click the *Speed Dial* tab and then click **Edit** . The *Edit Speed Dials* dialog box appears.
- 2) Click **Add**. A new line is added below the existing entries, allowing you to define a new entry.

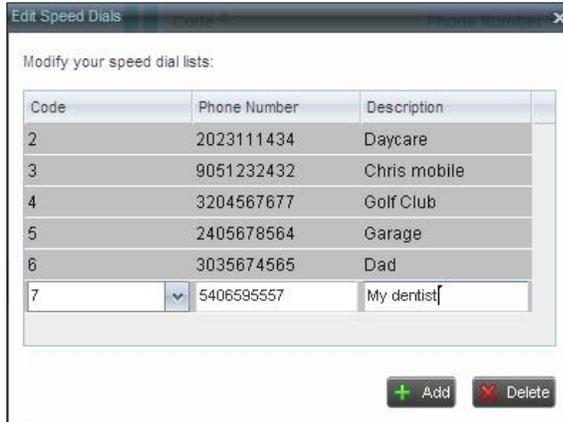


Figure 61 Edit Speed Dials Dialog Box – Add Entry

- 3) From the *Code* drop-down list on the left, select a speed dial code.
- 4) In the *Phone Number* text box, enter the phone number to assign to the code.
- 5) In the *Description* text box, enter a description that allows you to identify the entry.
- 6) To save the entry, click anywhere in the dialog box outside the entry.

### 7.6.2 Modify Speed Dial Entry

To modify a speed dial entry:

- 1) Click the *Speed Dial* tab and then click the **Edit**  button. The *Edit Speed Dials* dialog box appears.
- 2) Double-click the entry to modify. The entry becomes modifiable.



Figure 62 Edit Speed Dials Dialog Box – Modify Entry

- 3) Modify information as required.
- 4) To save the changes, click anywhere in the dialog box outside the entry.

### 7.6.3 Delete Speed Dial Entry

To delete a speed dial entry:

- 1) Click the *Speed Dial* tab and then click **Edit** . The *Edit Speed Dials* dialog box appears.

2) Select the entry to delete and click **Delete**.



Figure 63 Edit Speed Dials Dialog Box – Delete Entry

## 8 Monitor Contacts

Receptionist allows you to monitor the call state of selected contacts. This is referred to as static monitoring. In addition, Receptionist Enterprise allows you to monitor selected contacts dynamically.

You use the *Favorites* directory to view the phone state of statically monitored contacts and the *Group/Enterprise* directory to view the phone state of dynamically monitored contacts.

**NOTE:** If a call is parked against the contact that you are monitoring, the information about the parked call also appears.

The following sections describe information and procedures related to monitoring contacts:

- [Static Monitoring](#)
- [Dynamic Monitoring](#)
- [Contact States](#)

### 8.1 Static Monitoring

To statically monitor contacts, the list of contacts to monitor must be configured on your web portal. The selected contacts appear in your *Favorites* directory. However, the updates that you make to the list of contacts to monitor appear in Receptionist at the next sign-in.

| Status | Last Name | First Name | Number       | Extension | Mobile     | Notes                 |
|--------|-----------|------------|--------------|-----------|------------|-----------------------|
|        | Bueno     | Mario      | +12025551001 | 1001      | 2405559999 | <a href="#">Notes</a> |
|        | Dumas     | Marie      | +12025551005 | 1005      |            | <a href="#">Notes</a> |
|        | Richard   | Jean       | +12025551007 | 1007      |            | <a href="#">Notes</a> |

Figure 64 Favorites Directory with Monitored Contacts

### 8.2 Dynamic Monitoring

Dynamic Monitoring allows you to view the call state of selected contacts in your *Group/Enterprise* directory. You must request that a contact be monitored. Selected contacts cannot be unselected. When the number of monitored contacts reaches the maximum limit (the default is 100), the first contact that was selected to be monitored is unselected and stops being monitored. The state of a contact that is not monitored is shown as *Unknown*

| Status | Last Name         | First Name            | Number       | Extension | Mobile     | Notes                 |
|--------|-------------------|-----------------------|--------------|-----------|------------|-----------------------|
|        | Wyoming           | Madoline              | +12025551008 | 1008      |            | <a href="#">Notes</a> |
|        | Voice Portal      | Voice Messaging Gr... |              |           |            | <a href="#">Notes</a> |
|        | Valdez            | Gregorio              | +12025551006 | 1006      |            | <a href="#">Notes</a> |
|        | Technical Support | Call Center           | +12025551010 | 1010      |            | <a href="#">Notes</a> |
|        | Smith             | Stan                  | +12025551004 | 1004      |            | <a href="#">Notes</a> |
|        | Richard           | Jean                  | +12025551007 | 1007      |            | <a href="#">Notes</a> |
|        | Maldini           | Paolo                 | +12025551003 | 1003      |            | <a href="#">Notes</a> |
|        | Jones             | Shirley               | +12025551002 | 1002      | 2405558888 | <a href="#">Notes</a> |
|        | Hotline           | Call Center           | +12025551000 | 1000      |            | <a href="#">Notes</a> |
|        | Dumas             | Marie                 | +12025551005 | 1005      |            | <a href="#">Notes</a> |
|        | Bueno             | Mario                 | +12025551001 | 1001      | 2405559999 | <a href="#">Notes</a> |
|        | Baldwin           | Cheryl                | +12025551009 | 1009      |            | <a href="#">Notes</a> |

Figure 65 Group Directory with Monitored Contacts

### 8.3 Request Dynamic Monitoring

The set of contacts that you dynamically monitor is stored as part of your context information and automatically retrieved and activated on subsequent sign-ins.

**To monitor a contact:**

In the *Group/Enterprise* directory, click the **Status** icon of the contact to monitor.

**NOTE:** You cannot monitor the state of virtual users. Only regular users can be monitored.

| Stat... | Last Name | First Name     | Number       | Exten... | Mobile     | Department | Notes                    |
|---------|-----------|----------------|--------------|----------|------------|------------|--------------------------|
|         | Baldwin   | Cheryl         | +12025551009 | 1009     |            |            | <a href="#">On va...</a> |
|         | basicAA   | Auto Attendant | +12025551036 | 1036     |            |            | <a href="#">Notes</a>    |
|         | Bueno     | Mario          | +12025551001 | 1001     | 2021112223 |            | <a href="#">Notes</a>    |
|         | Dumas     | Marie          | +12025551005 | 1005     |            |            | <a href="#">Notes</a>    |
|         | Graves    | Lena           | +12025551022 | 1022     |            |            | <a href="#">Notes</a>    |
|         | Hotline   | Call Center    | +12025551000 | 1000     |            |            | <a href="#">Notes</a>    |
|         | Jones     | Shirley        | +12025551002 | 1002     |            |            | <a href="#">Notes</a>    |
|         | Maldini   | Paolo          | +12025551003 | 1003     |            |            | <a href="#">Notes</a>    |
|         | Rodriguez | Melody         | +12025551030 | 1030     |            |            | <a href="#">Notes</a>    |
|         | Smith     | Stan           | +12025551004 | 1004     | 2021234567 |            | <a href="#">Notes</a>    |

Figure 66 Group Directory – Requesting Contact Monitoring

This request states notifications from the Hosted VoIP Phone System for this contact; the contact's state is updated in real time.

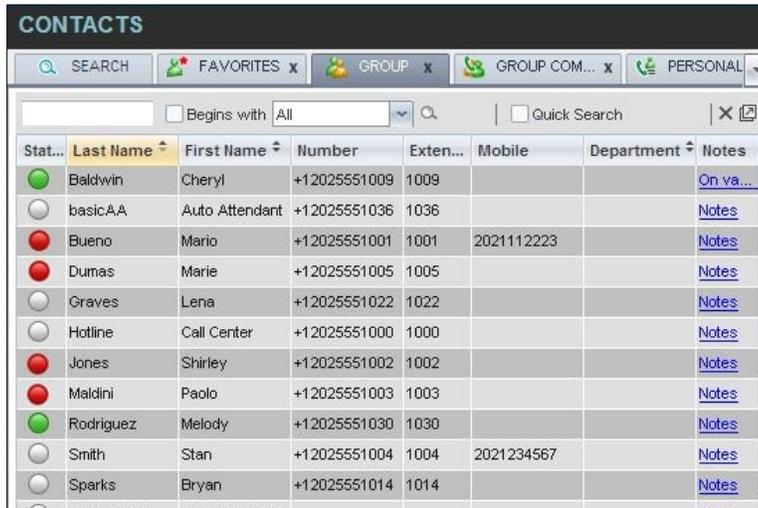


Figure 67 Group Directory – Monitored Contacts

### 8.4 Contact States

The state of a contact is represented by an icon located to the left of the contact's name. This state integrates the state of the contact's line, and the state of services such as Call Forwarding Always, Do Not Disturb, and Privacy. The following table lists the possible contact states:

| Icon | State in Receptionist  | DND | CFA | Privacy | Call State                     |
|------|------------------------|-----|-----|---------|--------------------------------|
|      | Private                | N/A | N/A | On      | N/A                            |
|      | On a Call              | N/A | N/A | Off     | Active call                    |
|      | Ringling               | N/A | N/A | Off     | Ringling call, no active calls |
|      | Away                   | N/A | N/A | Off     | No active calls                |
|      | Call Forwarding Always | N/A | On  | Off     | No active calls                |
|      | Do Not Disturb         | On  | Off | Off     | No active calls                |
|      | Available              | Off | Off | Off     | No active calls                |
|      | Unknown                | N/A | N/A | N/A     | N/A                            |

## 9 Manage Call History

You can organize call logs and delete selected call logs or all call logs from Call History.

### 9.1 View Call History

Receptionist allows you to view your passed calls. By default, the calls are grouped into placed, received, and missed calls.

**To view your call history:**

- 1) In the *Call Console*, click the **Call History** button . The *Call History* dialog box appears displaying your past calls. The calls are grouped into placed, received, and missed calls. By default, missed calls are displayed.

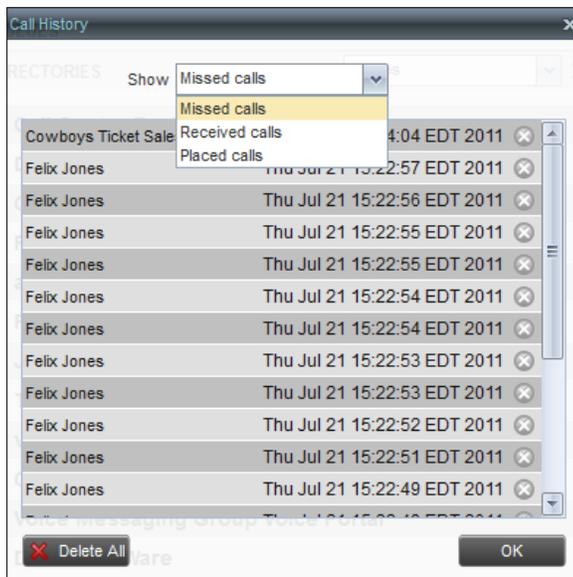


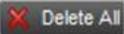
Figure 68 Call History Dialog Box

- 2) To show calls in a specific group, select that group from the *Show* drop-down list.

### 9.2 Delete Call History

This feature can be added by a Hosted VoIP Phone System administrator to allow you to delete a selected call log or all call logs from Call History.

**To delete call logs from Call History:**

- 1) In the *Call Console*, click the **Call History** button . The *Call History* dialog box appears.
- 2) To delete all call logs, click **Delete All** .
- 3) From the *Show* drop-down list, select a grouping.
- 4) To delete a selected log, click **Delete Call Log**  for that log.

## 10 Manage Queued Calls

Receptionist allows you to manage calls in selected call centers (up to five) and monitor calls in real time. You manage queued calls using the *Queued Calls* pane. This functionality is only available if you are supervising call centers or if you have been assigned the Hosted Call Center Supervisor license.



Figure 69 Queued Calls Pane

This section describes the following procedures you perform to manage queued calls:

- [Select Call Centers to Manage](#)
- [Modify Number of Calls to Display](#)
- [Retrieve Call from Queue](#)
- [Transfer Call to Ad Hoc Number](#)
- [Transfer Call Between Queues](#)
- [Transfer Call to Top of Queue](#)
- [Promote Call in Queue](#)
- [Group Calls](#)
- [Order Queued Calls](#)

### 10.1 Select Call Centers to Manage

After you sign in to Receptionist, select the call centers you want to manage (up to five).

**To select call centers:**

- 1) In the *Queued Calls* pane, click **Options**  and select the *Edit Queue Favorite Dialog* option.

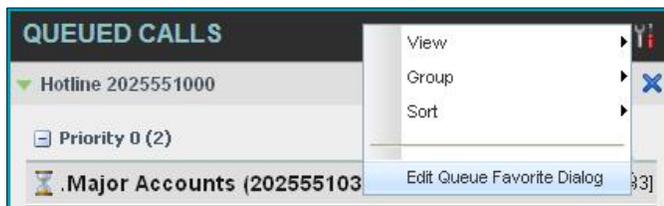


Figure 70 Queued Calls – Options – Edit Queue Favorite Dialogue.

The *Edit Queue Favorites* dialog box appears.

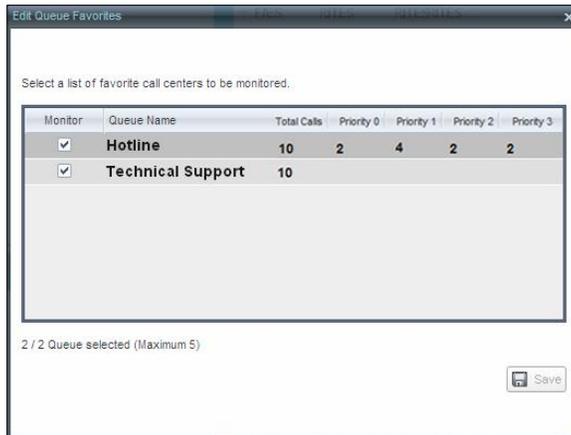


Figure 71 Edit Queue Favorites Dialog Box

- 2) Select the check boxes for the call centers you want to monitor.
- 3) Click **Save**.

The selected call centers appear in your *Queued Calls* pane.

## 10.2 Modify Number of Calls to Display

For each call center you can modify the maximum number of calls that can be displayed in each priority bucket. The total number of calls to display for a call center cannot exceed 50.

- 1) In the *Queued Calls* pane, click **Options**  and select the *Edit Queue Favorite Dialog* option. The *Edit Queue Favorites* dialog box appears.
- 2) For each Standard call center you are monitoring, set the total number of calls to display.
- 3) For each Premium call center you are monitoring, set the number of calls to display in each priority bucket. The total number of calls in all priority bucket cannot exceed 50.

## 10.3 View Queued Calls

To view calls in a queue:

Click the **Expand** button  for that queue.

## 10.4 Retrieve Call from Queue

You can retrieve a call from a queue to your phone device.

To retrieve a call from the queue:

In the *Queued Calls* pane, click the call to expand it and click **Retrieve**  for that call.

Once you retrieve the call, the call appears in the *Call Console*, and you treat it as any other call.

### 10.5 Transfer Call to Ad Hoc Number

To transfer a call to an ad hoc number:

- 1) In the *Queued Calls* pane, select the call.
- 2) In the *Dialer*, enter the destination number and click **Transfer** .

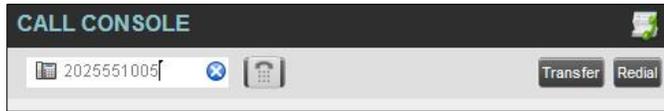


Figure 72 Ad Hoc Queue Transfer

The call is transferred and removed from the queue.

### 10.6 Transfer Call Between Queues

To transfer a call to another queue:

- 1) In the *Queued Calls* pane, select the call.
- 2) In the *Contacts* pane, click the *Queues* tab.
- 3) Click the target queue and click **Transfer**  for that queue.

The call is transferred and removed from the original queue.

### 10.7 Change Position of Call in Queue

To change the position of a call in the queue:

- 1) In the *Queued Calls* pane, click the call and click **Reorder** .



Figure 73 Reordering Queued Call

- 2) In the drop-down box that appears, select the new position in the queue.

The call is placed at the new position.

**NOTE:** The list can contain a maximum of 24 reorder positions you can choose from to reorder a call in queue, in addition to *Send to Back* and *Sent to Front* options.

### 10.8 Transfer Call to Top of Queue

If your administrator has configured the call center with the Transfer to Top feature, follow this procedure to transfer the call to the top of the queue.

You can only transfer a call to the top of the highest priority bucket (bucket with priority “0”). There need to be at least two calls in the target queue.

- 1) In the *Queued Calls* pane, click the target call to expand it.

- 2) Click **Reorder**  and select *Send to Front* from the list that appears.



Figure 74 Transferring Call to Top of Queue

### 10.9 Promote Call in Queue

In Premium call centers, a priority is attached to an incoming call based on the DNIS number on which the call is received. You can manually promote calls from a lower priority bucket to a higher priority bucket. A promoted call ends up as the last call in the higher priority bucket with a wait time of zero seconds.

**To promote a call, that is, to change its priority:**

In the *Queued Calls* pane, select the call to promote and click **Promote** .

The queued call is promoted to the end of the next highest priority bucket.

### 10.10 Group Calls

You can group queued calls by their priority bucket.

**To group or ungroup queued calls:**

- 1) In the *Queued Calls* pane, click **Options** , select *Group*, and then select or deselect *Group by priority*. This action applies to all monitored call centers.

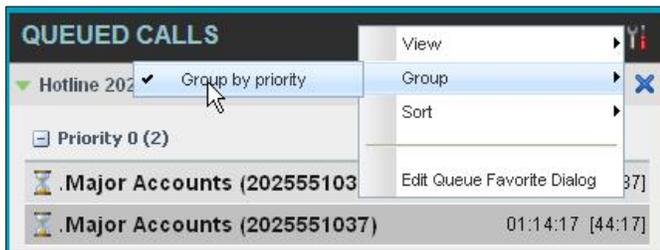


Figure 75 Queued Calls – Options – Group

- 2) To ungroup calls, unselect the *Group by priority* option.

### 10.11 Order Queued Calls

Queued calls can be ordered according to their total waiting time or according to their waiting time in the current priority bucket.

**To order queued calls:**

- 1) In the *Queued Calls* pane, click **Options** .
- 2) Select *Sort* and then the ordering option you want. This operation applies to all monitored call centers.

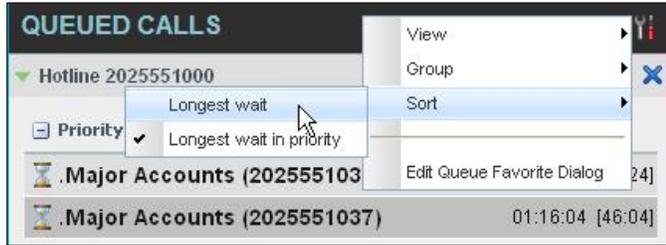


Figure 76 Queued Calls – Options – Sort

**NOTE:** The ordering does not work when calls are grouped. If required, first ungroup the calls.

## 11 Configure Web Browser for Receptionist

### 11.1 Configure Internet Explorer for Full Screen Mode

Internet Explorer needs to be configured as follows to enable the Full Screen link in Receptionist; otherwise the Receptionist is not displayed in full screen mode when the Full Screen link is clicked.

- 1) On the Internet Explorer *Menu* bar, select the *Tools* menu and then click **Internet Options**.
- 2) In the *Internet Options* dialog box, click the **Security** tab and then click the **Custom level...** button.

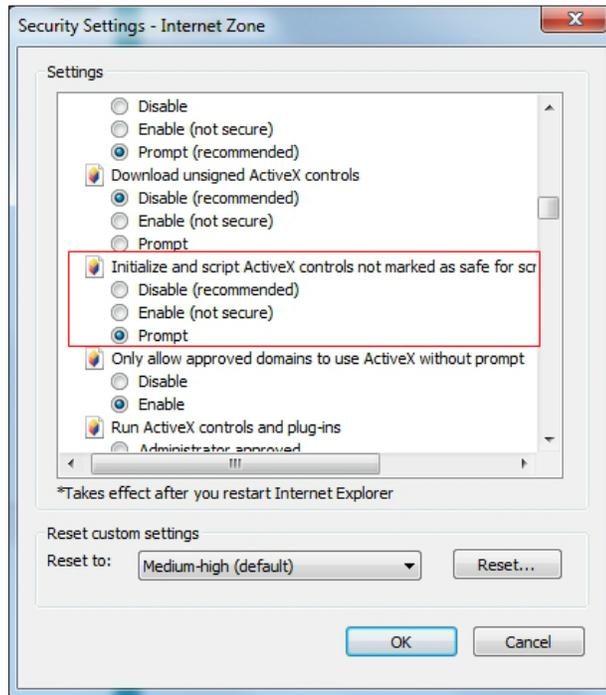


Figure 77 Internet Explorer Security Settings – Internet Zone Dialog Box

- 3) In the *Security Settings – Internet Zone* dialog box, scroll down to the *ActiveX controls and plug-ins* section, and then to the *Initialize and script ActiveX controls not marked as safe for scripting* settings.
- 4) Select *Enable* or *Prompt*.
- 5) Restart Internet Explorer.

## 12 Configure Receptionist

You use the Settings link at the top right-hand corner of the main page to access the *Settings* page where you can configure various aspects of the Receptionist application.

**NOTE:** Do **not** use the Internet browser's Back button to return to the main interface.

This section describes the *Settings* pages that you use to configure Receptionist:

- [Settings – General](#)
- [Settings – Application](#)
- [Settings – Services](#)
- [Settings – Plug-ins](#)
- [Settings – Messaging](#)
- [Settings – About](#)

**NOTE:** Depending on your system configuration, some settings may not be available.

### 12.1 Settings – General

You use the General tab to configure miscellaneous settings that improve the usability of Receptionist.

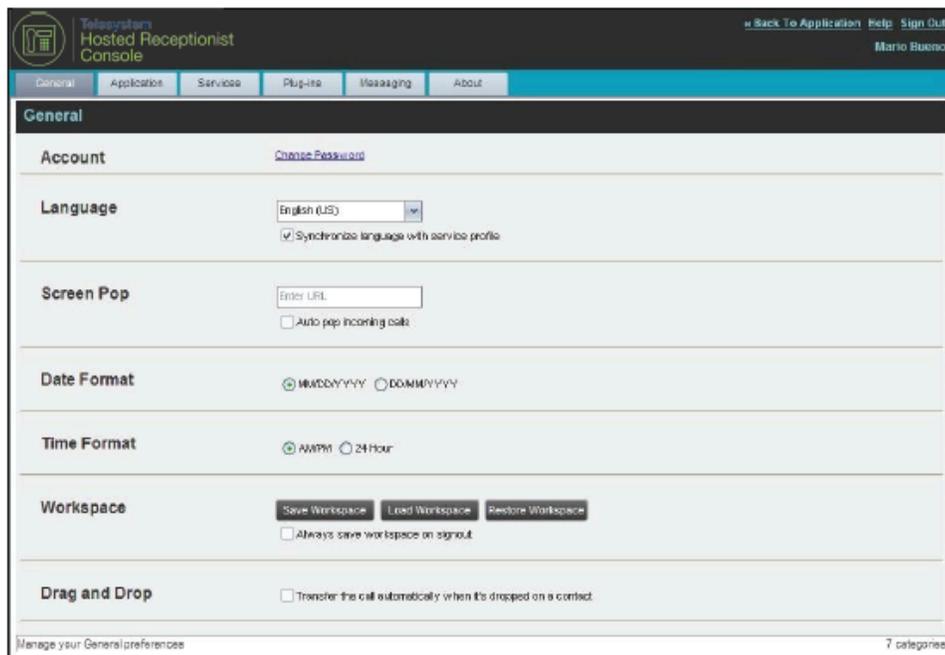


Figure 78 Setting – General

The following subsections describe the settings that can be configured on this page.

### 12.1.1 Account

You use this area to change your Hosted VoIP Phone System User password.

Receptionist shares login credentials with the Hosted VoIP Phone System. So when you change your password here, remember to use this new password when accessing your web portal.

**NOTE:** The password you enter must meet password requirements set on the Hosted VoIP Phone System.

#### To change your password:

- 1) Click the **Change Password** link. The section expands, allowing you to change your password.

The screenshot shows a web form titled 'Change Password ...'. It contains three text input fields labeled 'Old Password:', 'New Password:', and 'Confirm Password:'. At the bottom of the form are three buttons: 'Change Password', 'Reset', and 'Cancel'.

Figure 79 Account – Change Password

- 2) Enter your current and new password and click **Change Password**.

Note that the Reset button does not reset your password. It only clears the input boxes.

### 12.1.2 Language

The *Language* settings allow you to select the language of the user interface.

- The drop-down list identifies the languages available in your Receptionist. To change the language, select a new language from the list.
- *Synchronize language to my profile* – When this option is checked, Receptionist synchronizes the language with your Hosted VoIP Phone System User profile and ignores the language selection on this page.

### 12.1.3 Screen Pop

You use the *Screen Pop* settings to configure the URL that may be launched on incoming calls.

- *Enter URL* – This text box allows you to enter the URL address of the web page that Receptionist opens using the default browser when you click the Web Pop URL button in the *Call Notification* pop-up window.
- *Auto pop for Incoming Calls* – When this option is checked, Receptionist launches the Web Pop URL without your being required to click the Web Pop URL button in the *Call Notification* pop-up window for each incoming call.

The URL can point to any URL address, but typically points to a web application that parses optional call parameters and passes them to a Customer Relationship Management (CRM) application or other database. For example:

```
http://www.mysite.com/webapp.php?remoteNumber=__REMOTE_PHONE__&sp=__SERVICE_PROVIDER__
```

This URL passes the incoming calling number and the service provider ID to the web application at [www.mysite.com](http://www.mysite.com). The web application formats the data for the applicable database and launches the web page on your PC.

There are a number of optional parameters that the client can pass to the browser. The following list summarizes these parameters:

- **\_\_USER\_\_**: The user's Hosted VoIP Phone System ID (Note that in this case, the "user" is the Hosted VoIP Phone System subscriber.)
- **\_\_FIRST\_\_**: The first name of the user
- **\_\_LAST\_\_**: The last name of the user
- **\_\_EMAIL\_\_**: The e-mail address of the user
- **\_\_GROUP\_\_**: The name of the Hosted VoIP Phone System group to which the user belongs
- **\_\_SERVICE\_PROVIDER\_\_**: The name of the Hosted VoIP Phone System service provider to which the user belongs
- **\_\_PHONE\_\_**: The phone number of the user
- **\_\_REMOTE\_PHONE\_\_**: The phone number of the remote party
- **\_\_REMOTE\_NAME\_\_**: The name of the remote party (when available)
- **\_\_CALL\_TYPE\_\_**: "Incoming" or "Outgoing"
- **\_\_DNIS\_NAME\_\_**: The name of the DNIS on which the call was received
- **\_\_DNIS\_PHONE\_\_**: The phone number of the DNIS on which the call was received
- **\_\_REDIRECTED\_NAME\_1\_\_**, **\_\_REDIRECTED\_NAME\_2\_\_**, and so on: The name of a party to whom the call was redirected prior to being delivered to you, form the most recent to the least recent
- **\_\_REDIRECTED\_PHONE\_1\_\_**, **\_\_REDIRECTED\_PHONE\_2\_\_**, and so on: The phone number of a party to whom the call was redirected prior to being delivered to you, form the most recent to the least recent
- **\_\_REDIRECTED\_USERID\_1\_\_**, **\_\_REDIRECTED\_USERID\_2\_\_**, and so on: The user ID of a party to whom the call was redirected prior to being delivered to you, form the most recent to the least recent

**NOTE:** The maximum number of redirections that can be displayed on a Web Pop URL page is configured by your administrator.

#### 12.1.4 Date Format

This setting allows you to select the format to use for displaying the date in the calendar details for a contact. The possible options are:

- MM/DD/YYYY
- DD/MM/YYYY

#### 12.1.5 Workspace

Receptionist allows you to customize elements of your workspace, such as the size and placement of the main window on the desktop. The system remembers the setup between sessions.

The following elements can be customized:

- The size and position of the web browser window in which the main interface is displayed.
- The size of the panes (*Call Console*, *Contacts*, and *Queued Calls*).

**NOTE 1:** This functionality does not work in Internet Explorer, due to a technical limitation of Internet Explorer.

**NOTE 2:** When a window is vertically resized, the panes do not always resize to fill the window. To resize a window, drag the window from the bottom right-hand corner or collapse and then expand the panes after resizing to adjust them to the window.

#### Buttons:

- *Save Workspace* – This button, when clicked, saves the current workspace.
- *Load Workspace* – This button, when clicked, arranges your workspace according to the last saved configuration.
- *Restore Workspace* – This button, when clicked, restores the workspace to the system default configuration.
- *Always save workspace on signout* – When you sign out from the client, Receptionist asks you whether you want to save your current workspace. To save your workspace automatically when signing out without being asked, check the *Always save workspace on signout* box.

#### To customize your workspace:

- 1) Arrange the windows the way you like.
- 2) Click the **Save Workspace** button to save the current configuration. To restore the system default, click **Restore Workspace**.
- 3) At any time to return to the last saved configuration, click the **Load Workspace** button.

### 12.1.6 Drag and Drop

You use the *Drag and Drop* setting to configure the drag and drop operation.

- *Transfer the call automatically, when it's dropped on a contact* – This setting allows you to enable or disable automatic call transfer when you drag and drop. When this box is checked, the call is automatically transferred to the contact's phone number when the call is dropped on the contact.

## 12.2 Settings – Application

You use the Application tab to configure your availability to take calls as well as the policies used to process calls.

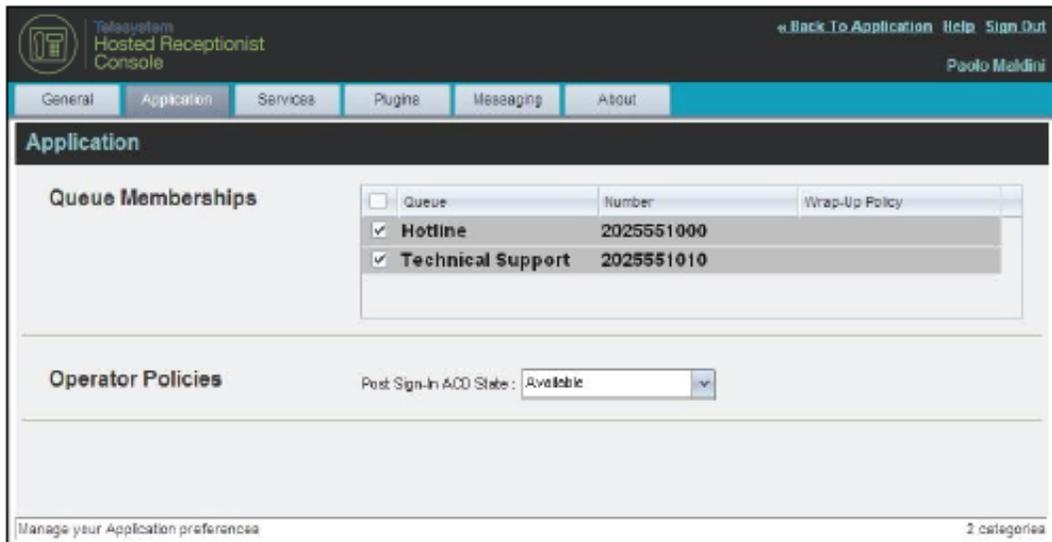


Figure 80 Settings – Application

The settings can be configured on this page and are described in the following subsections.

### 12.2.1 Queue Membership

These settings allow you to select which queues you want to join.

#### To join queues:

- 1) To join a specific queue, select the check box on the line for the queue.
- 2) To join all queues, select the check box in the column header.

**NOTE:** If you are not allowed to join/leave a queue, the line for the queue is dimmed and you can only view your join status in the queue. To change your join status in a queue if you are not allowed to do it yourself, contact your administrator.

For queues on this page, you can select columns to appear and you can sort and group queues by any column.

### 12.2.2 Operator Policies

The *Operator Policies* setting allows you to select your post sign-in state in your queues.

*Sign-In State* – This drop-down list allows you to select your availability to receive calls from queues upon signing in to Receptionist.

### 12.3 Settings – Services

You use the Services tab to configure various services assigned to you by your administrator in the Hosted VoIP Phone System Admin Portal, which are applicable to Receptionist. These settings are only available if you have been assigned such services. For more information, see your administrator.

The services are grouped into two categories: Active and Inactive.

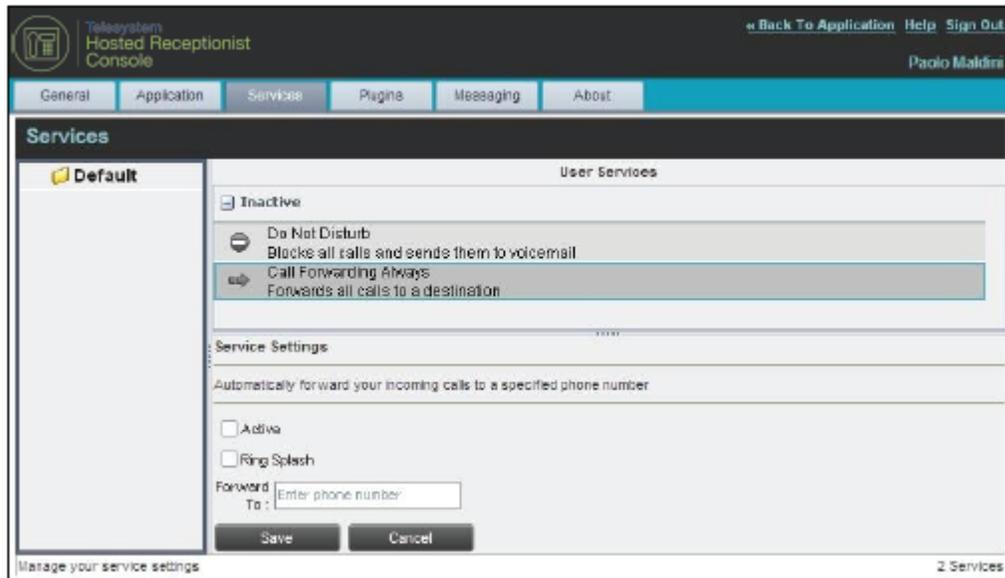


Figure 81 Settings – Services

The services that you can configure (if you have been assigned the services) are:

- Do Not Disturb – When you activate this service, you are not available to take calls, and all your calls are automatically sent to your voice mail.
- Call Forwarding Always – When you activate this service, you need to provide the phone number to forward your calls to. When the service is active, all your calls are forwarded to the specified number.

**To activate a service:**

- 1) Select the service and check the *is Active* box. The service is moved from the *Inactive* to *Active* category.
- 2) If you enabled the Call Forwarding Always service, in the *Forward To* text box that appears, enter the phone number to forward the calls to.
- 3) To generate a ring splash for incoming calls, check the *RingSplash* option.
- 4) To save your changes, click **Save**.

## 12.4 Settings – Plug-ins

You use the Plugins tab to configure the plug-in software used by Receptionist to provide functionality such as call notification, Outlook directories, program shortcuts, and call logs.

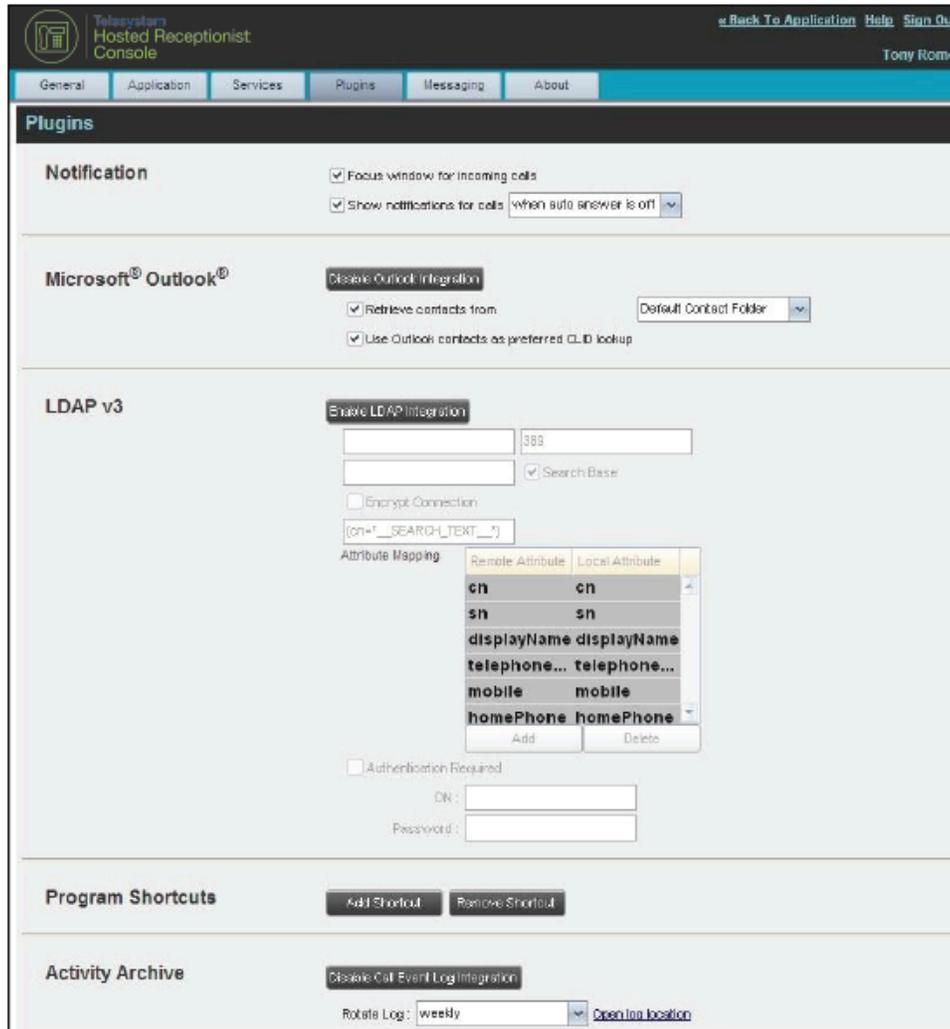


Figure 82 Settings – Plugins

**NOTE:** If your Plugins are configured to allow Receptionist to retrieve contacts from Outlook but the contacts are not loading, log out of Receptionist and clear your browser’s cache. Then log back into Receptionist and then refresh the page.

### 12.4.1 Notification

These options control when and how incoming call notification “pop-up toasts” are displayed. The options you can set are as follows:

- *Focus window for incoming calls* – When this option is checked and the browser window running Receptionist is minimized, Receptionist automatically restores the window on incoming calls.

This does not work in Firefox. In Internet Explorer, there must be only one tab open in the web browser running Receptionist.

- *Show notifications for calls* – When this option is checked, Receptionist displays the *Call Notification* pop-up window on top of other applications' windows when you receive a call. When you check this box, you need to select an option from the drop-down list to specify the condition under which notifications are displayed.

This does not work if there are other tabs open in the same web browser window as Receptionist. In addition, if calls come within eight seconds of each other, the *Call Notification* pop-up window only appears for the first call of that series.

#### 12.4.2 Microsoft Outlook

The Microsoft Outlook options control Outlook integration with Receptionist. They are only visible if Outlook integration is enabled in Receptionist.

The options you can set are as follows:

- *Enable/Disable Outlook Integration* – This determines whether Receptionist integrates with Outlook to provide you with access to your Outlook contacts. If Outlook integration is disabled, the corresponding desktop plug-in software components are not downloaded from the Hosted VoIP Phone System.
- *Retrieve contacts from* – This option allows you to specify where to look for your Outlook contacts. Choose *Default Contact Folder* to load local contacts. Choose *All Contacts* to load local contacts and contacts from Public Folders.
- *Use Outlook contacts as preferred CLID lookup* – When this option is checked, Receptionist uses Outlook to try to identify a caller, when the caller ID is unknown.

**NOTE:** The Outlook Integration feature provides the following functionality: CLID lookup, saving vCards, and accessing and searching Outlook contacts. When using Microsoft Outlook 2010 (32- or 64-bit edition), Outlook has to be running before Receptionist is launched for these functions to work.

#### 12.4.3 LDAP v3

LDAP settings allow you integrate an *LDAP* directory with Receptionist. These options are only visible if LDAP integration is enabled in Receptionist and the local network has been configured appropriately. If you do not know the appropriate settings, contact your system administrator.

Make sure you have correctly imported a valid certificate in the Java Keystore (JKS) with the keytool.

##### To import a certificate:

- 1) Click **Start** and then select *Run...*
- 2) Type "cmd" and click **OK**.
- 3) Type "<Java Runtime Path>\bin\keytool -import -alias <aliasname> -file <path><certificate file name> -keystore %JAVA\_HOME%\jre\lib\security\cacerts".

##### To verify the certificate:

- 1) Click **Start** and select *Run...*
- 2) Type "cmd" and click **OK**.
- 3) Type "<Java Runtime Path>\bin\keytool -printcert -file <path><certificate file name>".

The *LDAP* directory options are as follows:

- *Enable/Disable LDAP Integration* – This determines whether Receptionist provides *LDAP* directory lookup services. Clicking the **Enable LDAP Integration** button enables the controls for LDAP settings.

- *LDAP Hostname* – This is the network address of the LDAP server.
- *LDAP Port* – This is the port number for the LDAP server. This is compulsory and can be obtained from your system administrator.
- *Search Base* – The text box determines the location in the LDAP server tree that Receptionist looks in when executing a search. The check box, when checked, searches all sub-trees within the search base until the specifications are found.
- *Encrypt Connection* – This option determines whether Receptionist uses encryption when connecting to the LDAP server. Note that if encryption is enabled, you may have to use of a different port.
- *("cn=\_\_Search\_\_Text")* – This option specifies an additional search filter to apply to all directory searches. For example, to include the search criteria in the filter you must include (cn=\_\_SEARCH\_TEXT\_\_\*). Alternatively, in another example, "(telephoneNumber=\*)" restricts search results to users who have a telephone number assigned.
- *Attribute Mapping* – This table controls the way that Receptionist maps attributes returned from the directory server to columns displayed in the list of search results.  
  
In each row of the table, enter an LDAP attribute in the *Remote Attribute* column. Enter a corresponding local attribute in the *Local Attribute* column. Typical Remote Attribute values are "cn", "sn", "telephoneNumber", "mobile", "homePhone", and "mail".
- *Authentication Required* – When this box is checked, Receptionist client must provide a user name and password to the directory server to conduct searches.
- *DN* – This is the user name Receptionist uses when connecting to the LDAP server when *Authentication Required* is checked.
- *Password* – This is the password that corresponds to the authentication *DN*.

#### 12.4.4 Program Shortcuts

You use the *Program Shortcuts* settings to create Receptionist shortcuts on your desktop for convenient access to Receptionist.

The program shortcuts plug-in allows for the creation of a desktop shortcut on a Windows platform, which when clicked, launches Receptionist in your default web browser.

- *Add Shortcut* – This button, when clicked, creates a Receptionist shortcut on your desktop.
- *Remove Shortcut* – This button, when clicked, removes the previously created Receptionist shortcut. If you did not create a shortcut using the Add Shortcut button, the Remove Shortcut button has no effect.

#### 12.4.5 Call Event Log

This plug-in software provides the ability to store call event statistics locally on your computer.

- *Enable/Disable Call Event Log Integration* – This double-action button allows you to enable or disable log archival on your computer.
- *Rotate Log* – This parameter allows you to specify the frequency with which the log is rotated. You select the frequency from the drop-down list.
- *Open Log Location* – This link, when clicked, goes to the location on your computer where the log is stored.

The log is saved at the desired interval as a comma-separated value (CSV) file in the following path:

```
<Drive>:\Documents and Settings\<<Windows_Username>\Application
Data\BroadSoft\BW Receptionist\profiles\<<UserID>\statistics
```

where:

- *Drive* is the name of the drive where your profile is stored (typically C).
- *Windows\_Username* is your Windows user name.
- *BW\_User\_ID* is your Hosted VoIP Phone System user ID.

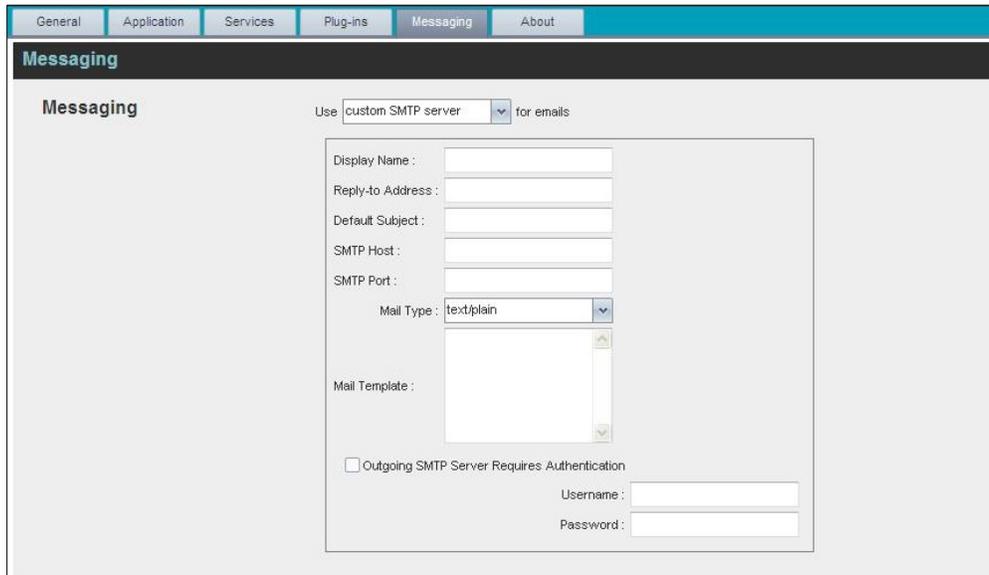
The following events are captured based on activity that occurs in the Receptionist client:

| Statistic              | Description   | Allowed Values   | Example Value                                      |
|------------------------|---|--|--|
| User ID                | Hosted VoIP Phone System user ID  | String   | <a href="mailto:jsmith@abc.net">jsmith@abc.net</a> |
| Call Center ID         | Call Center ID for inbound queued calls only  | String, null   | ABCSales   |
| Availability           | Operator's <i>joined</i> state  | Joined, Not Joined, null   | Joined   |
| ACD State              | Operator's <i>ACD</i> state. Typically, operators should always be Available. This value is not changeable in Receptionist. | Sign-On, Available, Unavailable, Wrap-Up, Sign-Out, null   | null   |
| Call ID                | ID of the call  | String, null   | 192.168.1.5:1                                      |
| Call State             | State of the call   | Idle, Incoming, Outgoing, Active, Held, Remote Held, Detached, Released, null                    | Incoming   |
| Personality            | The personality of the call. It indicates whether the user originated this call or whether the call was placed to the user. | Integer (0, 1, 2)<br>0 = Hosted VoIP Phone System Originator<br>1 = Originator<br>2 = Terminator | 0  |
| Remote Name            | External caller name  | String or null   | null   |
| Remote Number          | External caller number  | String or null   | 5555551234   |
| Last Redirected Name   | Last redirected name  | String or null   | Jane Doe   |
| Last Redirected Number | Last redirected number  | String or null   | null   |
| Time                   | Date stamp of record  | Long Date/Time Format  | 2008-04-03<br>12:08:17.859                         |

**NOTE:** Each row in the archive file records a *single* event change. Columns such as, *Availability*, *ACD State*, and *Call State* may contain null values since an alternate column value caused the event change. For example, Incoming is stored in *Call State* while *Availability* (and other columns) store null.

## 12.5 Settings – Messaging

The Messaging tab allows you to configure various messaging options for Receptionist. Currently, e-mail messaging is supported.



The screenshot shows the 'Messaging' settings page. At the top, there are tabs for 'General', 'Application', 'Services', 'Plug-ins', 'Messaging', and 'About'. The 'Messaging' tab is selected. Below the tabs, the page title is 'Messaging'. A dropdown menu is set to 'custom SMTP server' for emails. The main configuration area contains several fields: 'Display Name', 'Reply-to Address', 'Default Subject', 'SMTP Host', 'SMTP Port', 'Mail Type' (set to 'text/plain'), and 'Mail Template'. At the bottom, there is a checkbox for 'Outgoing SMTP Server Requires Authentication' and fields for 'Username' and 'Password'.

Figure 83 Settings – Messaging

### 12.5.1 E-mail Messaging

These options allow you to specify the mail client to use for sending e-mail messages.

From the drop-down list, select the mail client to use for e-mails.

If you selected the *custom SMTP server* option, you also need to configure the following options:

- *Display Name* – This is the name that is displayed in the *From* field.
- *Reply-to Address* – This is the address where reply messages can be sent.
- *Default Subject* – This is the subject that appears when you generate an e-mail message in Receptionist.
- *SMTP Host* – This is the IP address of the SMTP host.
- *SMTP Port* – This is the port of the SMTP host.
- *Mail Template* – This is the mail template to use.
- *Outgoing SMTP Server Requires Authentication* – When this option is set, authentication is required to send e-mails.
- *Username* – This is the name you must enter to authenticate yourself.
- *Password* – This is the password part of your authentication credentials.

**NOTE: Verify with your IT personnel that the firewall is configured to allow for this type of messaging.**

## 12.6 Settings – About

Use the About tab to view the information about Receptionist.

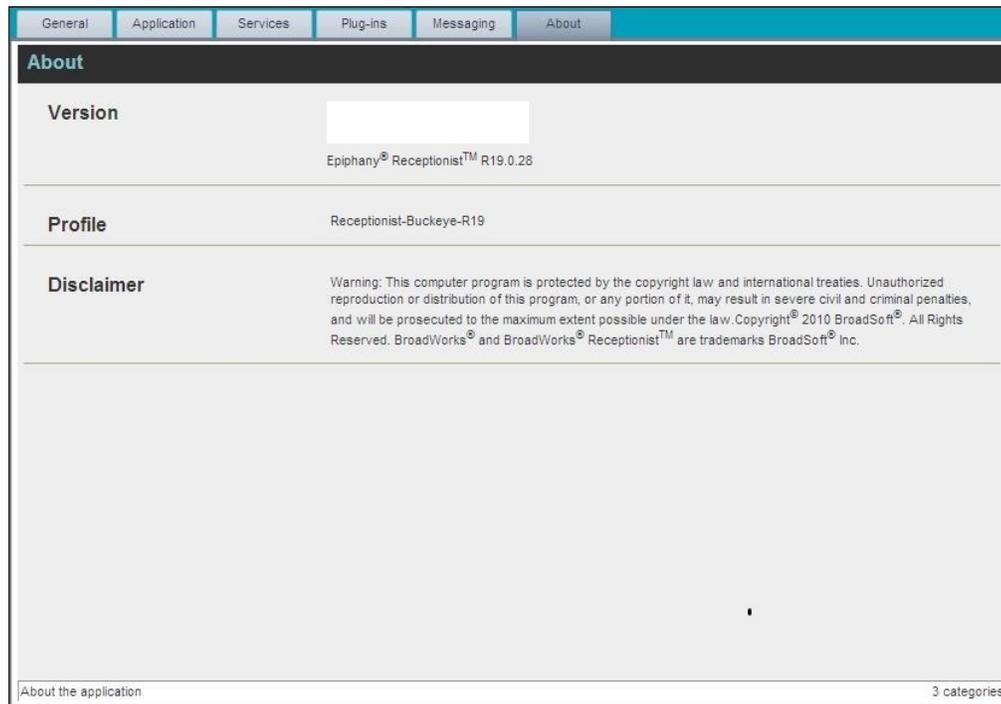


Figure 84 Settings – About Page

The following information is provided on this page:

- **Version** – This is the software version of the Hosted Receptionist client.
- **Profile** – This is the Receptionist client profile used.
- **Disclaimer** – This is the Receptionist copyright Information.

## 13 Appendix A: Glossary and Definitions

### 13.1 Monitored User States

The following table lists the possible states for monitored users:

| Icon  | State in Receptionist  | DND | CFA | Privacy | Call State                    |
|---|------------------------|-----|-----|---------|-------------------------------|
|  | Private                | N/A | N/A | On      | N/A                           |
|  | On a Call              | N/A | N/A | Off     | Active call                   |
|  | Ringing                | N/A | N/A | Off     | Ringing call, no active calls |
|  | Away                   | N/A | N/A | Off     | No active calls               |
|  | Call Forwarding Always | N/A | On  | Off     | No active calls               |
|  | Do Not Disturb         | On  | Off | Off     | No active calls               |
|  | Available              | Off | Off | Off     | No active calls               |

### 13.2 Call States

Call states are the states that your current calls can be in. They are as follows:

| Call State                        | Display Name   | Icon  | Description   |
|-----------------------------------|----------------|---|---|
| <i>Ringing In (Local)</i>         | Incoming Local |  | This represents a Click-To-Dial call ringing on your phone.   |
| <i>Ringing In (Remote)</i>        | Incoming       |  | The call is coming in and ringing on your phone.  |
| <i>Ringing In (Recalled Call)</i> | Call Recalled  |  | The call was parked or camped and is being recalled because its timer has expired.                    |
| <i>Ringing Out</i>                | Outgoing       |  | The call is outgoing, ringing out. This is equivalent to a phone ringing on the called party's phone. |
| <i>Active</i>                     | Active         |  | The call is an active call.   |
| <i>On Hold</i>                    | Held           |  | The call is on hold.  |
| <i>On Hold (Remote Held)</i>      | Remote Held    |  | The call is held by the remote party.   |
| <i>Active (In Conference)</i>     | Active         |  | The call is in a conference and active.   |
| <i>Held (In Conference)</i>       | Held           |  | The call is in a conference and on hold.  |

## 14 Appendix B: Keyboard Shortcuts

When using keyboard shortcuts, make sure that the main interface window is in focus.

| Key        | Equivalent Mouse Action  | Description  |
|------------|--|--|
| ESC        | Click the <b>Close</b> button  in a dialog box. | This closes the open dialog box.   |
| ESC        | Cancel the changes.  | This exits the currently selected editable item, such as a text box.   |
| /          | Click the <i>Dialer</i> text box.  | This places the cursor in the <i>Dialer</i> text box; it retains the currently selected item (if applicable).<br><b>NOTE:</b> In Internet Explorer 8, the “/” shortcut key does not always work. Pressing the key clears the default <i>Enter Number</i> text, but does not place the cursor in the input box. |
| ?          | Click the <i>Search</i> text box.  | This places the cursor in the <i>Search</i> text box; it retains the currently selected item (if applicable).  |
| ARROW DOWN | Click the scroll bar or the next item in a list.   | This selects the next item in the <i>Call Console</i> or <i>Queued Calls</i> pane.   |
| ARROW UP   | Click the scroll bar or the previous item in a list.   | This selects the previous item in the <i>Call Console</i> or <i>Queued Calls</i> pane.   |
| PAGE DOWN  | Scroll down one page.  | This goes to the next page in the <i>Call Console</i> or <i>Queued Calls</i> pane.   |
| PAGE UP    | Scroll up one page.  | This goes to the previous page in the <i>Call Console</i> or <i>Queued Calls</i> pane.   |
| 1...9      | Select a call in the <i>Call Console</i> .   | Pressing “1” selects the first call, pressing “2” selects the second call, and so on.  |
| SPACEBAR   | Click <b>Answer</b> on the selected incoming call in the <i>Call Console</i> .   | This answers the selected incoming call or if no call is selected, the incoming call that has been waiting the longest. Pressing the SPACEBAR again answers the next longest waiting incoming call, which puts the previously answered call on hold.   |
| <PERIOD>   | Click <b>End</b> on a selected call in the <i>Call Console</i> .   | This ends the selected call.   |
| ENTER      | Click <b>Dial</b> .  | If the cursor is placed in the <i>Dialer</i> text box, the entered digits are dialed.  |
| ENTER      | Click <b>Search</b> .  | If the cursor is placed in the <i>Search</i> text box, a search is performed.  |
| +          | Click <b>Transfer</b> in the <i>Dialer</i> .   | This transfers the selected call to the ad hoc number entered in the <i>Dialer</i> .   |
| SHIFT+1..9 | Select a ringing call and click <b>Answer</b> .  | Pressing <b>SHIFT+1</b> selects and answers the first ringing call, pressing <b>SHIFT+2</b> selects and answers the second ringing call, and so on.  |
| SHIFT+1..9 | Select an active call and click <b>Hold</b> .  | Pressing <b>SHIFT+1</b> selects and places the first active call on hold, pressing <b>SHIFT+2</b> selects and answers the second active call, and so on.   |
| SHIFT+1..9 | Select a held call and click <b>Retrieve</b> .   | Pressing <b>SHIFT+1</b> selects and retrieves the first held call, pressing <b>SHIFT+2</b> selects and retrieves the second held call, and so on.  |
| S or s     | Click on <b>Settings</b> link.   | This opens the <i>Settings</i> page if main window is in focus.  |

| Key                | Equivalent Mouse Action                   | Description  |
|--------------------|---|--|
| B or b             | Click on <b>Back to Application</b> link. | This goes back to the main page from the <i>Settings</i> page. |
| R or r             | Click the <b>Call History</b> button.     | This opens the <i>Call History</i> dialog box.                 |
| H or h             | Click the <b>Help</b> link.               | This opens a guide in a PDF format.                            |
| SHIFT+L or SHIFT+I | Click the <b>Sign Out</b> link.           | This signs the user out of the application.                    |

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