Receptionist Console

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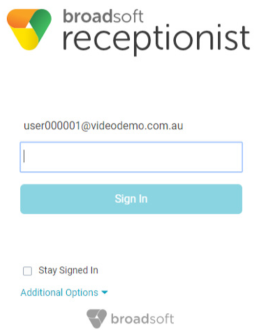
CONTENTS

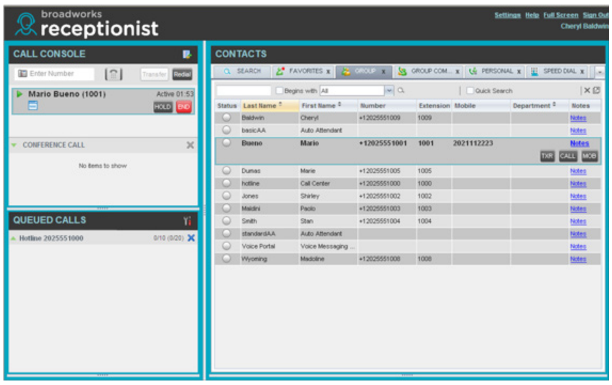
How do I access the reception console?

Open https://xsp.a4uc.com.au/receptionist/ in your browser of choice on your windows machine.

On the landing page enter the username and password supplied by your supplier.



Manage Calls



Dial Contact

1. In the Contacts pane, click the target directory tab.

2. Click the contact and then click CALL for that contact.

3. To dial the contact's alternate number, if available, click the right Call button and select the number from the list.

Dial Ad Hoc Number

In the Dialer, enter the number and click Dial.

Redial Number

Up to 10 previously, dialed numbers are available.

1. In the Dialer, click Redial. A list of recently called numbers appears.

2. From the list, select the number to call.

Dial from Call History

3. In the Call Console, click Call History.

4. In the dialog-box that appears, select Placed Calls, Received Calls, or Missed Calls from the Show drop-down list.

5. Click a call log and then click Call for that log.

View Current Calls

Your current calls are always visible.

To display the details of the conference call, click the Expand button in the Conference Call panel.

View Incoming Calls Details

If the Call Notification feature is enabled, a notification window appears on top of the system tray when you receive a call, displaying the name and number of the caller. For calls from a call center, the call center name and diversion information (if applicable) is displayed in addition to the caller's name and phone number.

Save vCard

When Outlook is running, you can save the caller's phone number and personal information as a vCard in Outlook.

In the Call Notification pop-up window that appears when you receive a call, click Add vCard.

Open URL

You can open a Uniform Resource Locator (URL) page in your browser, to get more information about the current call.

In the Call Notification pop-up window, which appears when you receive a call, or in the Call Console on the line for the target call, click Web Pop URL.

Answer Call

In the Call Console, move the mouse over an incoming call and then click ANS for that call.

Hold Call

This function is not available from a remote office.

In the Call Console, move the mouse over the call and then click HOLD for that call.

Resume Call

This function is not available from a remote office.

In the Call Console, move the mouse over the call and then click ANS.

End Call

In the Call Console, click END for the call to end.

The call is removed from the Call Console.

Blind Transfer

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

6. In the Call Console, select the call to transfer.

7. To transfer the call to an ad hoc number, enter the number in the Dialer and then click Transfer.

8. To transfer the call to a contact, click a contact in one of the Contacts directories and then click TXR for that contact.

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

9. To transfer the call to the contact's alternate number, if available, click the right Transfer button and select the number form the list.

Supervised Transfer

To transfer an active inbound call with supervision:

10. In the Call Console, select the call.

11. Dial the number or contact to whom you want to transfer the call.

12. If the number is busy, either retry or dial another number.

13. Move the mouse over the new call and click TXR.

Transfer with Consultation

Calls can be transferred while active, held, or ringing (in).

14. Dial the number or contact to whom you want to transfer the call.

15. When the call is answered, speak to the party.

16. In the Call Console, select the call to transfer.

17. Move the mouse over the new call and then click TXR.

Transfer to Voice Mail

18. In the Call Console, select the call to transfer.

19. In the Contacts pane, click a contact with voice mail (in the Group/Enterprise or Favorites directory) and then click VM for that contact.

20. To transfer the call to your own voice mail, select yourself.

Transfer to Queue (Enterprise Edition)

21. In the Call Console, select the call to transfer.

22. In the Contacts pane, click the Queues tab.

23. Click a queue and then click TXR for that queue.

Camp on Busy Contact (Enterprise and Small Business Editions)

You can camp external calls trying to reach a busy extension. The call is transferred when the destination becomes available.

24. In the Call Console, select the call to camp.

25. In the Group/Enterprise or Favorites directory, click a busy or ringing contact and then click CAMP for that contact. The call is camped and removed from the Call Console.

26. If the call timer expires before the call is answered, the call is recalled to your device and reappears in the Call Console.

Group Call Park (Enterprise Edition)

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

27. In the Call Console, click an active or held call and then click PARK for that call. The call is parked on an available extension and then removed from the Call Console.

28. If the call timer expires before the call is answered, the call is recalled to your device and reappears in the Call Console.

Directed Call Pickup

You can answer a call on behalf of another person.

29. In the Contacts pane, click the Group/ Enterprise or Favorites directory tab.

30. Click a ringing contact and click ANS. The call appears in the Call Console.

Start Three-Way Conference

31. If necessary, place calls to participants.

32. In the Call Console, select one of the calls to conference.

33. Move the mouse over the non-selected call and then click CONF. The calls are moved to the Conference Call panel.

Hold Conference

To hold the conference, in the Conference Call panel header, click HOLD.

Resume Conference

To resume the conference, in the Conference Call panel header, click ANS.

Hold or Resume Conference Participant

- To place a participant on hold, click HOLD for the target call.
- To resume a participant, click ANS for the target call.

Leave Conference

To leave the conference, click LEAVE in the Conference Call panel header. The other parties stay connected but the calls are removed from the Conference Call panel. Note that you can only leave a Three-Way conference.

End Conference

To end the conference, click End in the Conference Call panel header. The calls are terminated and removed from the Conference Call panel.

Barge In on Call

34. Click the target directory tab.

35. Click a busy contact and then click BARGE. A Three-Way Conference is established.

Sent E-mail to Contact

36. Click the target directory tab.

37. Click a contact with e-mail and then click EMAIL.

38. In the message window that appears, enter the required information and then click Send.

View Call History

39. In the Call Console, click Call History . The Call History dialog box displays your placed, received, and missed calls.

40. To view call logs in a group, select the group from the Show drop-down list.

Delete Call Logs

41. In the Call Console, click Call History. The Call History dialog box appears.

42. To delete all call logs, click Delete All.

43. To delete a specific log, click Delete Call Log for that log.

Receive Calls from Queues

To start or stop receiving calls from queues:

44. Click the Settings link at the top right-hand corner of the main interface and then click the Application tab.

45. In the Queue Memberships section, check the Queue box for each call center to join.

46. In the Operator Policies section, select your Post Sign-In ACD State from the drop-down list.

Enable Call Waiting and Auto Answer

47. To enable Call Waiting, click Call Waiting in the Call Console.

48. To enable Auto Answer, click Auto Answer in the Call Console.

Note that this feature works only if your device is Advanced Call Control (ACC)-compliant. In addition, if Auto Answer is enabled on the server, you must not enable Auto Answer in the client.

Start Call Recording

In the Call Console, select the call to record and click Record .

Note that the call recording functionality available in Call Center depends on your Call Recording service settings.

Pause Call Recording

In the Call Console, select a call that is being recorded and then click Pause .

Resume Call Recording

In the Call Console, select a paused call and then click Resume .

Stop Call Recording

In the Call Console, select a paused call and click Stop .

View and Change Security Classification of Calls

If you have the Security Classification service, you can view the security classification of your calls and change your current security classification in the Call Console.

To change your security classification, select a classification level from the Security Classification drop-down list.

The security classification of your current calls is recalculated.

Receptionist Interface

The main elements of the Receptionist interface include:

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

Call Console

The Call Console is where you manage your current calls. It contains the following:

- The main area of the Call Console lists your current calls and allows you to perform actions on them.
- Dialer – This allows you to make ad hoc calls and redial up to 10 of the most recently dialed numbers.
- Conference panel – This lists the call legs of your current conference call and allows you to take actions on conference calls.

For each call, the name and the phone number of the remote party (if available), the call state, the duration of the call, and for held calls, the time the call has been on hold, are displayed.

For a recalled call, information about the user, against whom the call had been parked, also appears.

Contacts Pane

You use the Contacts pane to call, monitor, and manage your contacts. The pane lists available contact directories.

- **Favorites** – Contacts whose status you are (statically) monitoring, which are configured on the web portal
- **Group/Enterprise** – Contacts in your enterprise or group
- **Group/Enterprise Common** – Contacts in your group's or enterprise's common phone list on BroadWorks
- **Personal** – Contacts in your Personal directory on BroadWorks
- **Speed Dial** – Speed dial numbers configured for your Speed Dial 8 and/or Speed Dial 100 service
- **Queues** (Enterprise Edition) – Your call centers
- **Instant Message** – Your monitored IM&P contacts
- **Outlook** (Enterprise Edition) – Your Outlook contacts, if the Outlook feature is configured
- **Custom** (Enterprise Edition) – Contacts in your custom directories on the web portal
- **Managed Contacts** (Enterprise Edition) – Contains dynamically managed contacts.
- **LDAP search results** (Enterprise Edition) – Read-only access to Lightweight Directory Access Protocol (LDAP) contacts via the Search feature, if the LDAP feature is configured

The Contacts pane also contains the Search tab and capabilities, which you use to search for contacts.

Queued Calls Pane (Enterprise Edition)

You use the Queued Calls pane to manage queued calls. This pane displays calls in selected call centers that you are managing. For each call, the following information is provided:

- Call Status icon, which can be:
  - Call is waiting to be answered
  - Message is being played to caller
  - Call was reordered
  - Call was bounced
- Name/number of the call center (or Dialed Number Identification Service [DNIS], if applicable)
- Total call time, including the time in the current queue (in parentheses)

Clicking a call expands the call to show additional data:

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

Settings, Full Screen, and Help Links

- The Settings link, when clicked, displays the Settings page, allowing you to configure Receptionist.
- The Full Screen link, when clicked, displays the Receptionist main window in full-screen mode.

- The Help link, when clicked, opens the BroadWorks Hosted Thin Receptionist User Guide in PDF format.

Manage Contacts

Show Directories

49. At the top of the Contacts pane, click the drop-down arrow to the right of the directory tabs.

50. From the list that appears, select the directory to display. The directory tab displays at the top of the Contacts pane and its contents appear in the Contacts pane.

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

Monitor Contacts Statically

The Favorites directory, configured on the web portal, displays the phone state of contacts. This is called static monitoring.

Monitor Contacts Dynamically (Enterprise Edition)

In the Group/Enterprise directory, click the contact's status icon. The contact is monitored and added to the Monitored Contacts directory. This is referred to as dynamic monitoring.

Contact Phone and Calendar States

The possible contact phone states are:

- available
- on a Call
- ringing
- do not disturb
- private
- forwarding and
- unknown

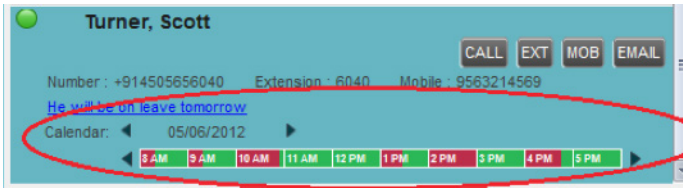
The contact's calendar presence:

- in a Meeting
- away.

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

See Calendar for Monitored Contact

52. Click a monitored contact in the Favorites or Group/Enterprise panel. The contact's entry expands showing additional information, including a calendar with information from the contact's Exchange calendar. Red color indicates when the contact is busy.



53. Use arrow buttons to change the date and time on the calendar.

Make Notes about Contact (Enterprise Edition)

You can make notes about contacts in the Group/Enterprise, Favorites, Custom, or Monitored directories.

54. Click the target directory tab.

55. Click the Notes link for the contact.

56. Enter or modify information in the Notes for <Contact Name> dialog box.

57. To save your changes and close the dialog box, click OK.

To close the dialog box without saving, click Cancel.

Manage Speed Dial and Personal Directories

58. In the Speed Dial or Personal tab, click Edit. The Edit Speed Dials/Edit Personal Contacts dialog box appears.

59. To add an entry, click Add. A new row appears.

- For a Speed Dial entry, select the dial code and enter the number and description of the contact.

- For a Personal entry, enter the name and number.

60. Do delete an entry, select the entry, and then click Delete.

61. To modify a Speed Dial entry, double-click the entry to make it editable and then modify it as necessary.

Note that you cannot modify a Personal entry.

Perform Quick Search

62. Select the directory to search and order it by the column to search.

63. Check the Quick Search box.

64. From the keypad that appears, select a single character. The contacts that start with the selected character (in the selected column) appear in the directory.

Perform Regular Search

65. Select the directory to search or click the Search tab to search in all directories.

66. If searching in a specific directory, make sure that the Quick Search box is unchecked.

67. In the Search text box, enter the text for which you want to search. You can enter partial information (at least two characters).

68. To restrict the search to contacts that start with the entered string, check the Begins with box.

69. If searching in a specific directory, select the column to search by from the drop-down list. You can select a specific column or all columns. In the Search tab, all columns are searched.

70. Click the Search button.

Create Directory from Search Results

71. Perform a search on a single column in a specific directory.

72. When the results appear, click the Pullout button . A new tab is created that contains the results of the search.Once closed, a search results tab cannot be reopened.

Instant Messaging

If you have an IM&P service assigned on BroadWorks, you can chat with your IM&P contacts, and monitor the state of selected contacts.

Monitor IM&P Contacts

To monitor the IM&P state of a contact, you first need to subscribe to the contact.

73. In the Instant Message tab, click Edit . The Edit Instant Message Contacts dialog box appears.

74. Click Add and enter the display name and a valid IM&P ID of the contact in the new row. A subscription request is sent to the contact.

Alternatively, click the IM&P state icon of an unsubscribed contact .

Set Your IM&P State and Message

75. Click the Presence box at the top right-hand side of the main window and select your new state from the drop-down list.

76. Click Edit next to the Presence box and enter a message to display to other IM&P users in the dialog box that appears.

IM&P States

The possible states are:

- available
- busy
- away
- offline

In addition, the following states are displayed in some directories, for IM&P users you are not monitoring:

- not subscribed
- ending subscription

Accept IM&P Subscription Request

When you receive a request from another user, to accept the request, click Yes in the dialog box that appears. The contact is added to the Instant Message directory, if it is not there.

Chat with Contact

77. To chat with one of your IM&P contacts, click the Chat button for the contact. A chat window appears.

78. Enter your message in the text box at the bottom of the window and press ENTER.

You can have more than one chat window open. You can also accept chat requests from contacts.

Create a Multi-User Chat

79. Click the Add button in a current chat window. A drop-down list of available contacts appears.

80. Check the check box next to each contact to invite to the chat and click the Invite button. When a contact joins the chat, a notification appears in the log area of the chat window.

81. To leave the chat, close the dialog box.

Manage Queues (Enterprise Edition)

Display Queued Calls

To monitor calls in queues, you must select the queues to display in the Queued Calls pane.

82. In the Queued Calls pane, click Options and select the Edit Queue Favorite Dialog menu item.

83. In the dialog box that appears, check the call centers to display and then click Save.

Retrieve Call from Queue

84. In the Queued Calls pane, expand a Call Center panel.

85. Click the call and click RETRIEVE for that call. The call appears in the Call Console and you treat it as any other call.

Transfer Call to Queue

86. In the Queued Calls pane, expand a Call Center panel and then select a queued call.

87. In the Contacts pane, expand the Queues panel.

88. Click a queue and then click TXR for that queue. The call is transferred to the bottom of the queue.

Change Position of Call in Queue

89. In the Queued Calls pane, expand a Call Center panel.

90. Click the call and then click REORDER for that call.

91. From the drop-down list that appears, select a new position.

Note that you cannot place a call ahead of a bounced call.

Transfer Call to Top of Queue

92. In the Queued Calls pane, expand a Call Center panel.

93. Click the target call and then click REORDER for that call.

94. From the drop-down list that appears, select Send to Front.

Promote Call in Queue (Premium Call Center Only)

95. In the Queued Calls pane, expand a Call Center panel.

96. Click the call and then click PROMOTE. The call is moved to the end of the next highest priority bucket.

Transfer Call to Contact or Ad-Hoc Number

97. In the Queued Calls pane, select a queued call.

98. To transfer the call to a contact, click the contact in the Contacts pane and then click TXR for that contact.

99. To transfer the call to an ad hoc number, enter the number in the Dialer and then click Transfer in the Dialer.