BroadWorks Hosted Thin Receptionist

User Guide

Release 22.0

Document Version 1

9737 Washingtonian Boulevard, Suite 350
Gaithersburg, MD 20878
Tel +1 301.977.9440

WWW.BROADSOFT.COM

BroadWorks® Guide

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Document Revision History

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1 Summary of Changes

This section describes the changes to this document for each release and document version.

1.1 Changes for Release 22.0

This section describes the changes to this document for each document version of Release 22.0.

Document Version 1

This version of the document includes the following changes:

- Added *Appendix B: Diagnostic Tool* and updated sections *2.2 How This Guide Is Organized* and *13.6 Settings – About* for the Client Side Diagnostic Tool For Thin Clients Feature Description (EV 228113).
- Added section *14 Configure Web Browser* for EV 249302.
- Updated sections *5.3.2 Directories List* and *9.1 Show/Hide Directories* for EV 246104.
- Updated sections *6.6.5 Dial from History, 11.1 View Call History, 13.1.4 Date Format,* and *13.1.5 Time Format* for EV 245705.
- Updated section *5.2.3 Current Calls* and added sections *5.2.6 Call Redirection Reasons* and *16.4 Call Redirection Reasons* for PR-48139.
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- Updated sections *9.3.2 Perform Regular Search, 9.4 Order Directory Entries,* and *9.5 Make Notes about Contact (Enterprise Edition)* for the Search in Receptionist Notes Feature Description (FR 2226).
- Updated sections *4.1 Launch Receptionist from Web Portal* and *4.2 Sign in from Web Browser* Thin Clients System Use Notification Feature Description (FR 10633).
- Added section *15.2 Tab Button in Microsoft Edge* to specify a restriction when running the client in Edge.

1.2 Changes for Release 21.0

This section describes the changes to this document for each document version of Release 21.0.

Changes for Release 21.0, Document Version 3

This version of the document includes the following change:

- Changed references to the *BroadWorks Application Server User Web Interface Administration Guide* to *BroadWorks User Web Interface Administration Guide* as the document has been renamed.

Changes for Release 21.0, Document Version 2

This version of the document includes the following change:

- Updated section *11 Manage Queued Calls (Enterprise Edition)* for EV 222258.

Changes for Release 21.0, Document Version 1

This version of the document includes the following changes:

- Updated section *9 Monitor Contacts* for the *Personal Assistant Feature Description (EV 216692)*.
- Updated document for the *Thin Client Usability Enhancements Feature Description (EV 195594)*.
- Updated section *12.5 Settings – About*.

1.3 Changes for Release 20.0

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Changes for Release 20.0, Document Version 4

This version of the document includes the following changes:

- Updated sections *9.5 Contact States* and *12.6 Monitored User States* for EV 224630.
- Revised indexing.

Changes for Release 20.0, Document Version 3

This version of the document includes the following changes:

- Updated sections *3.2.2 Contact Directories* for EV 216467.

Changes for Release 20.0, Document Version 2

This version of the document includes the following changes:

- Updated sections *5.1.3 Signed-in User Information*, *5.3 Contacts Pane*, for the *Thin Clients to Conform to Presence Rules Feature Description (EV 192595)*.

Changes for Release 20.0, Document Version 1

This version of the document includes the following changes:

- Updated for the *Receptionist Usability Update for Directories Feature Description (EVs 172852, 182502)*.
- Updated for the *Visual Security Classification for Active Call Feature Description (EV 174096)*.
- Updated sections *5.5.1 Call Action Buttons* for the *Call Recording – Start/Stop/Pause/Resume User Control Feature Description (EV 172506)*.
- Updated sections *5.2.3 Current Calls*, *6.2.2 View Incoming Call Details* for the *Diversion Info Availability for Queued Calls Feature Description (EV 175543)*.
- Updated sections *4 Get Started* for EV 192180.
- Removed section on theme for EV 194697.
- Updated sections *5 Explore Workspace* and *12.1.5 Workspace* for EV 175559.
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- Updated section *6.6 End Call* for EV 198717.
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1.4 Changes for Release 19.0

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Changes for Release 19.0, Document Version 1

This version of the document includes the following changes:

- Updated document for the *Web Pop URL Enhancement – Call Center and Receptionist Feature Description (EV 150425)*.
- Updated the description of the Unknown phone state in sections *9.5 Contact States* and *12.6 Monitored User States*.
- Updated document for the IM&P for the *Call Center and Receptionist Clients Feature Description (EV 150369)*.
- Added section *4.2 Sign-in Restrictions* for the *Thin Client Single User Login Restrictions Feature Description (EV 163737)*.
- Updated sections *5.1.3 Signed-in User Information, 9 Monitor Contacts*, and *Appendix A: Glossary and Definitions* for the *Calendar Presence Integration Feature Description (EV 142625)*.
- Updated section *8 Manage Contacts* for the IM*&P for Call Center and Receptionist Clients Feature Description (EV 150369)*.
- Updated document for changes in the user interface and added section *5.3.6 Group/Enterprise Common Tab*.

1.5 Changes for Release 18.0

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Changes for Release 18.0, Document Version 2

This version of the document includes the following changes:

- Updated sections *3.2.1 User Interface*, *3.3.1 User Interface*, *3.4.1 User Interface*, *5 Explore Workspace*, *5.4 Queued Calls Pane (Enterprise Edition)*, and *11 Manage Queued Calls (Enterprise Edition)* to align document with changes in the application.
- Updated section *5.4 Queued Calls Pane (Enterprise Edition)* for EV 159630. The position of some information in the *Queued Calls* pane has changed. The position has changed for the name and number of the remote party and the name and number of the DNIS/call center that took the call.

Changes for Release 18.0, Document Version 1

This version of the document includes the following changes:

- Updated sections *5.1.3 Signed-in User Information*, *5.2.3 Current Calls*, *5.2.5 Call States and Actions*, and *9 Monitor Contacts* for the *Call Park and Recall Enhancements – Receptionist Thin Feature Description (EV 105267)*.
- Updated sections *4 Get Started* for EV 153628.

1.6 Changes for Release 17.sp2

This section describes the changes to this document for each document version of Release 17.sp2

Changes for Release 17.sp2, Document Version 6

This version of the document includes the following changes:

- Updated section *11.11 Order Queued Calls* for EV 142502.
- Updated section *9 Monitor Contacts* for EV 144284.

Changes for Release 17.sp2, Document Version 5

This version of the document includes the following changes:

- Updated section *11.1 Select Call Centers to Manage* for EV 141300.
- Updated document for the usability enhancements.
- Updated sections *9.5 Contact States* and *12.6 Monitored User States* for EV 146017.
- Updated sections *8.6 Manage Personal Contacts* and *8.7 Manage Speed Dial Entries* for EV 145992.
- Updated section *5.4 Queued Calls Pane (Enterprise Edition)* for EV 146214.
- Updated sections *5.3 Contacts Pane* and *8.5 Make Notes about Contact (Enterprise Edition)* with comments from testing.

Changes for Release 17.sp2, Document Version 4

This version of the document includes the following changes:

- Updated document with changes in the application.
- Updated section *11 Manage Queued Calls (Enterprise Edition)* for EV 141300.
- Updated *Appendix C: Keyboard Shortcuts* for EV 130778.
- Updated sections *6.2.2 View Incoming Call Details* and *12.4.2 Notification* for EV 131521.

Changes for Release 17.sp2, Document Version 3

This version of the document includes the following changes:

- Updated section *12.1.5 Workspace* for EV 119881.
- Updated sections *6.2.2 View Incoming Call Details* and *12.4.2 Notification* for EV 118621.

Changes for Release 17.sp2, Document Version 2

This version of the document includes the following changes:

- Updated sections *6.3.1 Answer Call* and *6.4.2 Resume Held Call* for EV 126902.
- Updated section *12 Configure Receptionist* for EV 126771.
- Updated section *5 Explore Workspace* for EV 127180 and 128936.
- Updated section *12.5 Settings – About* to align document with changes in the interface.
- Updated section *5 Explore Workspace* for EV 126451.

Changes for Release 17.sp2, Document Version 1

This is a new document for this release.

2 About This Document

This guide provides step-by-step procedures and reference information for BroadWorks Hosted Thin Receptionist Release 22.0.

BroadWorks Hosted Thin Receptionist herein is referred to as Receptionist, Receptionist client, or client.

Receptionist exists in three editions: Enterprise, Small Business, and Office, each tailored to the specific needs of its target users. This guide covers all three editions of Receptionist.

NOTE: Not all the features that are available on the Broadworks Receptionist are supported on the TPG/AAPT BizPhone services.

2.1 Audience

This document is intended for end users of Hosted Thin Receptionist Enterprise, Small Business, and Office.

2.2 How This Guide Is Organized

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

Section	Overview
Introduction to Receptionist	This section provides an overview of Receptionist and its three editions: Enterprise, Small Business, and Office.
Get Started	This section describes how to sign in and out of Receptionist, perform the initial setup, change password, and obtain help.
Explore Workspace	This section provides an overview of the user interface.
Manage Calls	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.
Message Contacts (Enterprise Edition)	This section includes information on how to send e-mail messages to contacts.
Manage Contacts	This section provides information on managing contact directories and searching for contacts.
Monitor Contacts	This section describes static and dynamic monitoring and includes information on how to select contacts to monitor.
Manage Call History	This section provides information on managing call logs.
Manage Queued Calls (Enterprise Edition)	This section provides information on managing queued calls.
Configure Receptionist	This section describes the settings you can configure to set up and customize Receptionist for improved usability.
Appendix A: Glossary and Definitions	This appendix contains definitions of call states and phone states used in Receptionist.
Appendix C: Keyboard Shortcuts	This appendix describes keyboard shortcuts available in Receptionist.

2.3 Additional Resources

For more information on Receptionist and on Application Server procedures used by group administrators, department administrators, and users, see the following BroadWorks guides:

- BroadWorks Hosted Thin Receptionist Configuration and Administration Guide
- BroadWorks Application Server Group Web Interface Administration Guide (Parts 1 and 2)
- BroadWorks Getting Started Web Interface Administration Guide
- BroadWorks CommPilot Call Manager and Attendant Console User Guide
- BroadWorks User Web Interface Administration Guide

3 Introduction to Receptionist

BroadWorks 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. BroadWorks Receptionist realizes the promise of IP telephony by enhancing business processes and delivering rich services in a user-friendly way.

BroadWorks 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"
- Web-based interface, accessible from a web browser

Hosted Thin Receptionist, introduced in Release 17.sp2, is a SaaS Rich Internet Application (RIA) hosted on BroadWorks and allows you to manage calls from a web browser.

> **NOTE**: For information about the web browsers supported by Receptionist, see the *BroadWorks Hosted Thin Receptionist Configuration and Administration Guide* or contact your administrator.

This document describes the BroadWorks Hosted Thin Receptionist client.

3.1 Receptionist Editions

Receptionist exists in three editions: Enterprise, Small Business, and Office, each tailored to the specific needs of its target users.

The following sections provide an overview of the Receptionist Enterprise, Small Business, and Office interface and functionality and refer you to other sections of the document for more information.

> **NOTE**: Features available in a specific version are identified and tagged with the edition's name.

3.2 Receptionist Enterprise

The Receptionist Enterprise edition is a BroadWorks 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, and views, and other features required in large or distributed organizations.

3.2.1 User Interface

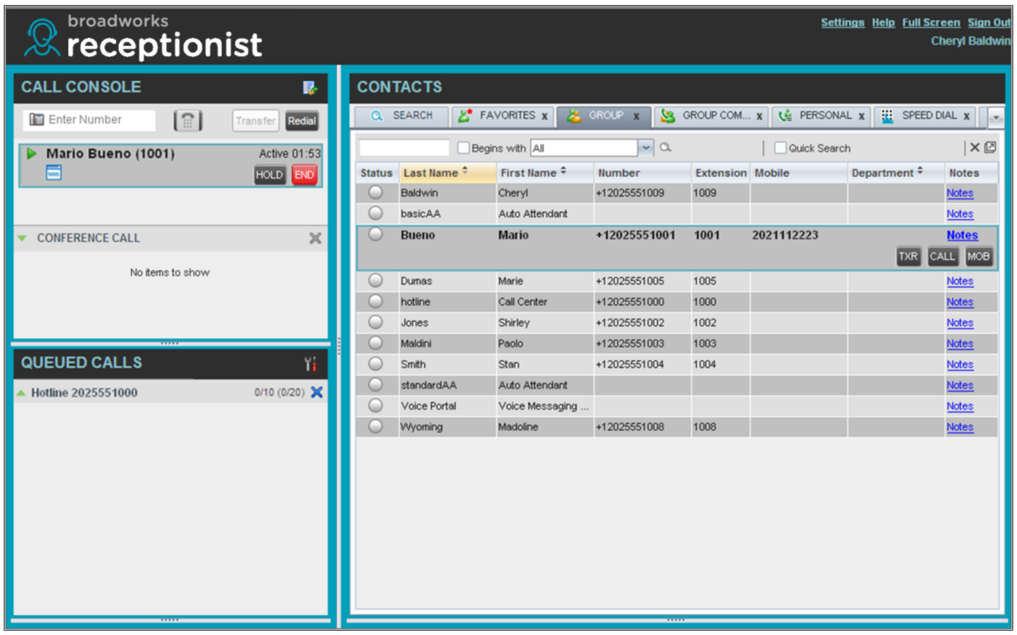


Figure 1 Receptionist Enterprise Main Interface

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 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 *5 Explore Workspace*.

3.2.2 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 statically monitoring. The list of contacts to monitor must be configured for you.	Monitoring is limited to 200 static contacts enterprise-wide.
Group/Enterprise	This consists of all contacts in your group or enterprise directory. 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 and it cannot exceed 100.
Group/Enterprise Common	This consists of all contacts in your group's or enterprise's common phone list configured by your administrator.	The directory may be empty if your administrator has not configured any contacts.
Monitored Contacts	This consists of contacts whose phone status you are currently dynamically monitoring.	If the directory is empty, it is not shown.
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.

For information on managing your contact directories, see section *8 Manage Contacts*; for information on using your contacts to make and manage calls, see section *6 Manage Calls*; for information on monitoring contacts, see section *9 Monitor Contacts*.

3.2.3 Call Management Functions

The Receptionist Enterprise provides the following call management functions.

Function	Quick Reference
View Call Details	View Call Information
Dial Contact	Dial Contact
Dial Ad Hoc Number	Dial Ad Hoc Number
Redial	Redial Number
Speed Dial	Speed Dial
Dial From Call History	Dial from History
Answer Call	Answer Call
Hold Call	Put Call on Hold
Resume Held Call	Resume Held Call
End Call	End Call
Blind Call Transfer	Blind Transfer Call

Function	Quick Reference
Supervised Call Transfer	Conduct Supervised Transfer
Consulted Call Transfer	Transfer with Consultation
Transfer to Voice Mail	Transfer to Voice Mail
Transfer to Queue	Transfer to Queue (Enterprise Edition)
Busy Camp On	Conduct Busy Camp On (Enterprise and Small Business Editions)
Group Call Park	Conduct Group Call Park (Enterprise Edition)
Directed Call Pickup	Pick Up Call
Operator Call Barge-in	Barge in on Call
Start Conference Call	Start Three-Way Conference
Add Participant	Add Participant to Conference
Hold Conference Call	Hold Conference
Resume Conference Call	Resume Held Conference
Put Participant on Hold	Put Conference Participant on Hold
Take Participant off Hold	Resume Conference Participant
End Participant	Remove Conference Participant
Leave Conference Call	Leave Conference
End Conference Call	End Conference

For more information, see section *6 Manage Calls*.

3.3 Receptionist Small Business

The Receptionist Small Business edition is a lower-priced version of the client, targeted at front-office personnel in small and mid-sized organizations that do not require multiple directories, call queuing, or other advanced features. It supports a full set of call control functions and monitoring of up to 30 lines in the directory.

3.3.1 User Interface

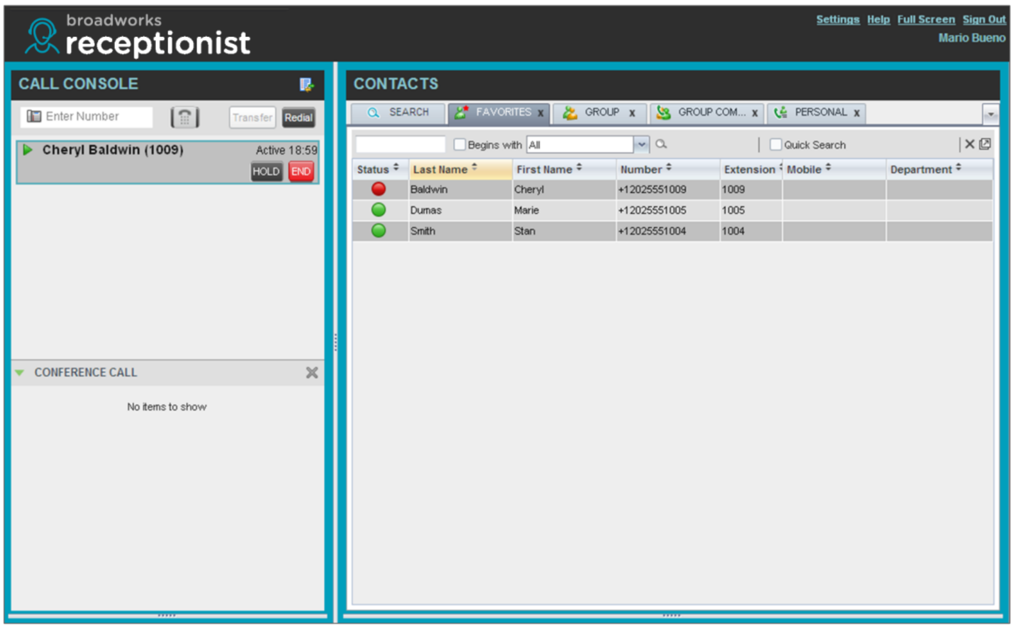


Figure 2 Receptionist Small Business Main Interface

The interface contains the following 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.
- **Contacts pane** – This pane contains your contact directories and allows you to use contacts to manage calls. You also use the *Contacts* pane to monitor 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 to view and return your past calls.

For more information, see section *5 Explore Workspace*.

3.3.2 Contact Directories

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

Directory Name	Contents	Comments
Favorites	This consists of the contacts whose phone status you are currently monitoring.	Monitoring is limited to 30 static users company-wide.

Directory Name	Contents	Comments
Group/Enterprise	This consists of all contacts in your group or enterprise directory.	
Group/Enterprise Common	This consists of all contacts in your group's or enterprise's common phone list configured by your administrator.	The directory may be empty if your administrator has not configured any contacts.
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.

For information on managing your contact directories, see section *8 Manage Contacts*; for information on using your contacts to make and manage calls, see section *6 Manage Calls*; for information about monitoring contacts, see section *9 Monitor Contacts*.

3.3.3 Call Management Functionality

This section lists call management functions of Receptionist Small Business and provides you with pointers to sections of this document where they are described.

Function	Quick Reference
View Call Details	View Call Information
Dial Contact	Dial Contact
Dial Ad Hoc Number	Dial Ad Hoc Number
Redial	Redial Number
Speed Dial	Speed Dial
Dial From Call History	Dial from History
Answer Call	Answer Call
Hold Call	Put Call on Hold
Resume Held Call	Resume Held Call
End Call	End Call
Blind Call Transfer	Blind Transfer Call
Supervised Call Transfer	Conduct Supervised Transfer
Consulted Call Transfer	Transfer with Consultation
Transfer to Voice Mail	Transfer to Voice Mail
Busy Camp On	Conduct Busy Camp On (Enterprise and Small Business Editions)
Directed Call Pickup	Pick Up Call
Operator Call Barge-in	Barge in on Call
Start Conference Call	Start Three-Way Conference
Add Participant	Add Participant to Conference
Hold Conference Call	Hold Conference
Resume Conference Call	Resume Held Conference
Put Participant on Hold	Put Conference Participant on Hold
Take Participant off Hold	Resume Conference Participant

Function	Quick Reference
End Participant	Remove Conference Participant
Leave Conference Call	Leave Conference
End Conference Call	End Conference

3.4 Receptionist Office

The Receptionist Office edition is targeted at a small office environment with a limited number of employees. It supports the standard set of Call Control features and the monitoring of up to eight lines in the directory.

3.4.1 User Interface

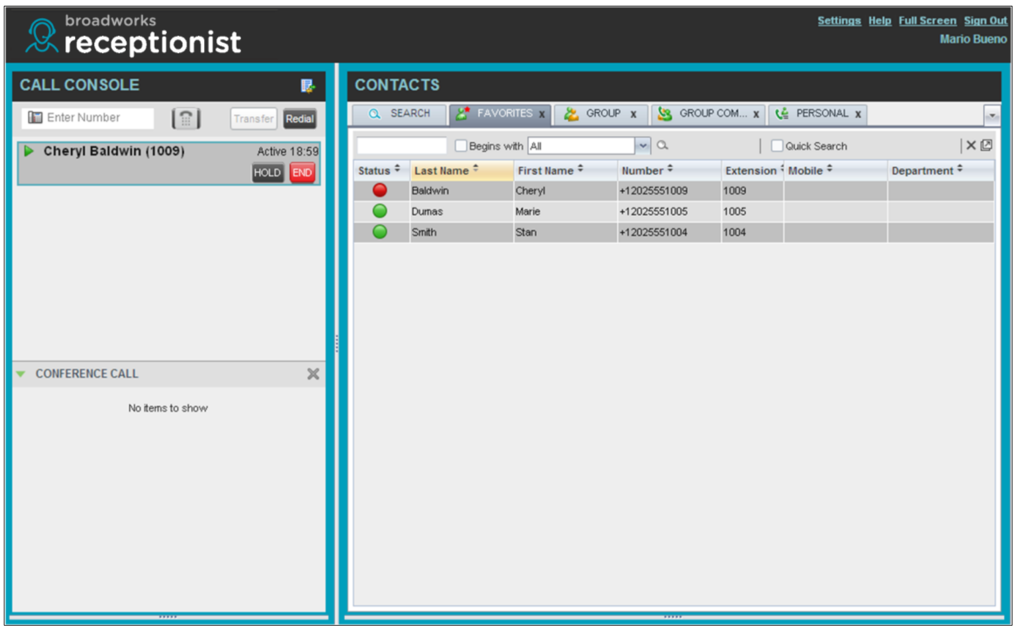


Figure 3 Receptionist Office Main Interface

The interface contains the following 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.
- **Contacts pane** – This pane contains your contact directories and allows you to use contacts to manage calls. It also allows you to 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 *5 Explore Workspace.*

3.4.2 Contact Directories

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

Directory Name	Contents	Comments
Favorites	This consists of the contacts whose phone status you are currently monitoring.	Monitoring is limited to eight static users group-wide.
Group/Enterprise	This consists of all contacts in your group.	
Group/Enterprise Common	This consists of all contacts in your group's or enterprise's common phone list configured by your administrator	The directory may be empty if your administrator has not configured any contacts.
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.

For information on managing your contact directories, see section *8 Manage Contacts*; for information on using your contacts to make and manage calls, see section *6 Manage Calls*; for information about monitoring contacts, see section *9 Monitor Contacts*.

3.4.3 Call Management Functionality

The Receptionist Office provides the following call management functions.

Function	Quick Reference
View Call Details	View Call Information
Dial Contact	Dial Contact
Dial Ad Hoc Number	Dial Ad Hoc Number
Redial	Redial Number
Speed Dial	Speed Dial
Dial From Call History	Dial from History
Answer Call	Answer Call
Hold Call	Put Call on Hold
Resume Held Call	Resume Held Call
End Call	End Call
Blind Call Transfer	Blind Transfer Call
Supervised Call Transfer	Conduct Supervised Transfer
Consulted Call Transfer	Transfer with Consultation
Transfer to Voice Mail	Transfer to Voice Mail
Directed Call Pickup	Pick Up Call
Operator Call Barge-in	Barge in on Call
Start Conference Call	Start Three-Way Conference
Add Participant	Add Participant to Conference
Hold Conference Call	Hold Conference
Resume Conference Call	Resume Held Conference

Function	Quick Reference
Put Participant on Hold	Put Conference Participant on Hold
Take Participant off Hold	Resume Conference Participant
End Participant	Remove Conference Participant
Leave Conference Call	Leave Conference
End Conference Call	End Conference

4 Get Started

You access the Receptionist over the through the JNLP file. The sign-in procedure is the same for all Receptionist editions.

> **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.

4.1 Launch JNLP File

Receptionist needs the Java HTTPS server to run its desktop integration features.

> **NOTE**: You should run Java JRE 1.6 or higher.

As you sign in, Receptionist starts downloading a JNLP file containing the Java HTTPS server to your machine. Perform the following steps to accept the download and install the server:

1) When a file download pop-up window appears in your browser asking you whether you want to open or save the file, save the file.

   Messages about downloading and verifying the application contained in the file appear followed by a dialog box asking you whether you want to run the application.

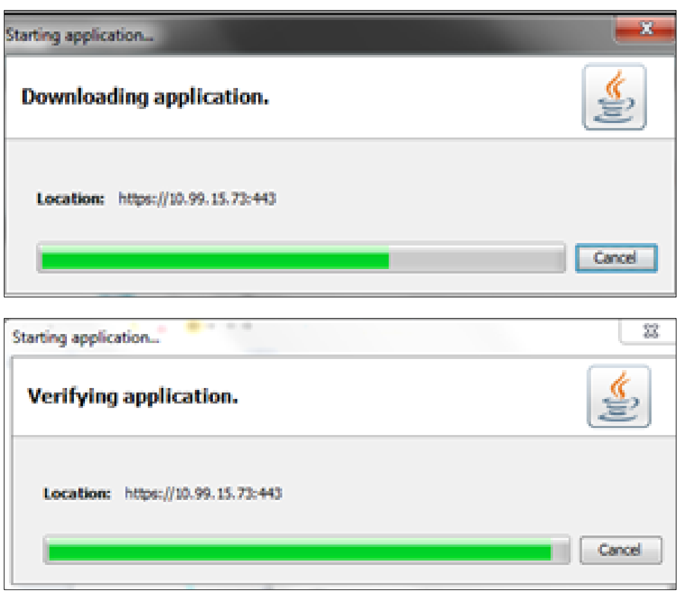


Figure 4 Downloading and Verifying Application Pop-up Window

Figure 5 "Do you want to run this application?" Dialog Box

2) Click **Run**. This starts the Java HTTPS server allowing Receptionist to access the desktop integration features.

> **NOTE**: Desktop integration features will not be avalibale if you click **Cancel**.

If you refresh the browser after the local HTTPS server has started, the JNLP file is not downloaded again and the HTTPS server simply continues intializing the desktop integration features.

4.2 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 6 Sign-in Dialog Box with Error Message

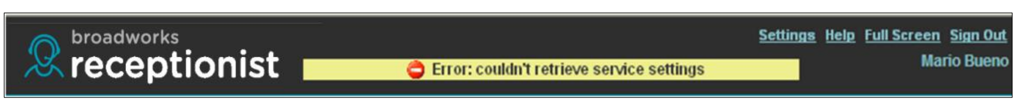


Figure 7 Receptionist Main Interface (Top of Page) with Error Message

4.3 Get Help

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

Figure 8 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.

4.4 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.

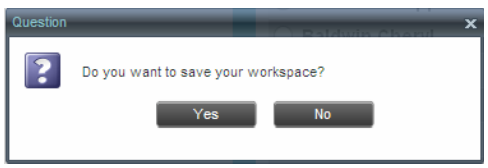
   

   Figure 9 Question Dialog Box

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*.

4.5 Set Up Your Environment (Enterprise Edition)

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

- Select call centers to manage – see section *11.1 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*.

4.6 Change Your Password

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.

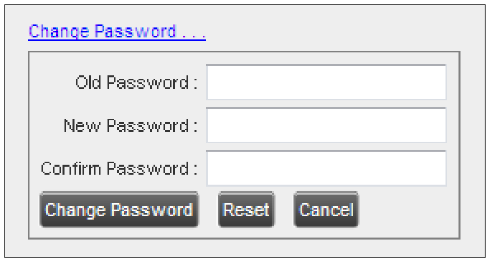


Figure 10 Account – Change Password

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.

5 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.

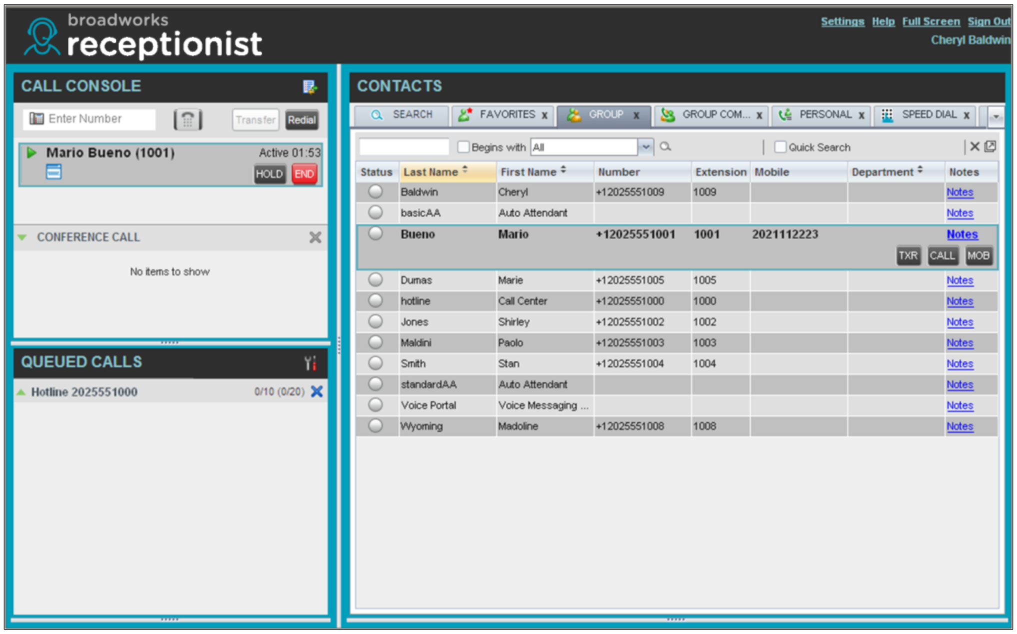


Figure 11 Receptionist Enterprise Main Interface

Many visual aspects of Receptionist are configurable. For example, you can decide which windows should be open and change the size and placement of windows on the screen. 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 in 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 *5.5 Controls*. The action buttons are described in section *5.5.1 Call Action Buttons*.

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

- Logo Pane
- Call Console
- Contacts Pane
- Queued Calls Pane (Enterprise Edition)
- 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 *10 Manage Call History*.

5.1 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.

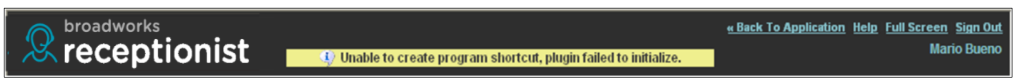


Figure 12 Receptionist Logo Pane

5.1.1 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 appears for several seconds and then disappears.

5.1.2 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.

5.1.3 Signed-in User Information

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

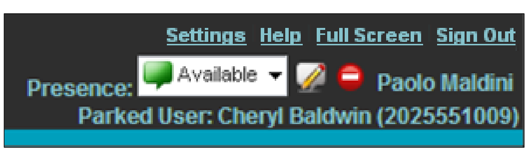


Figure 13 Signed-in User Information

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.

– Voice Messaging .

The information is presented in the following format:

<In a Meeting/Away/CFA/DND> <Voice Messaging>

The *<In a Meeting/Away/CFA/DND>* state is represented by one icon with the *In a Meeting/Away* states having precedence over the CFA and DND states, and the CFA state having precedence over the DND state.

The Voice Messaging icon is present only if you have outstanding voice messages.

In addition, if a call is parked against your extension, the following information appears:

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

5.2 Call Console

You use the *Call Console* to view and manage your current calls. For information on managing your calls, see section *6 Manage Calls*.

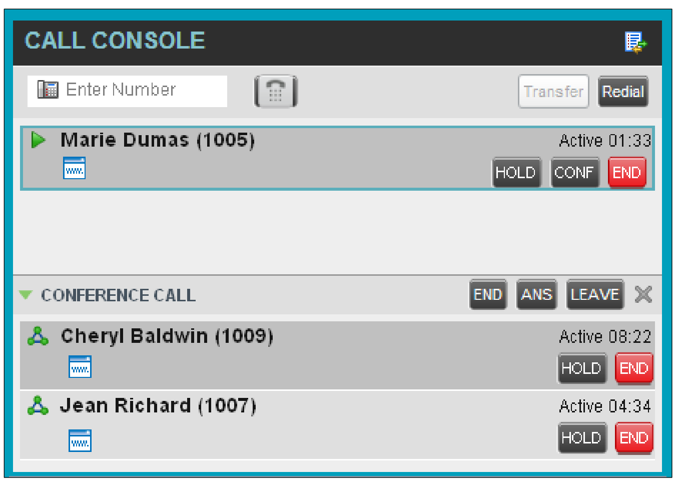


Figure 14 Call Console

The *Call Console* contains the following areas:

- Header
- Dialer
- Current Calls
- Conference Call Panel

5.2.1 Header

The Call Console header contains the following controls:

- 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.

5.2.2 Dialer

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

Figure 15 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 *5.2.5 Call States and Actions* and *5.5.1 Call Action Buttons*.

5.2.3 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.

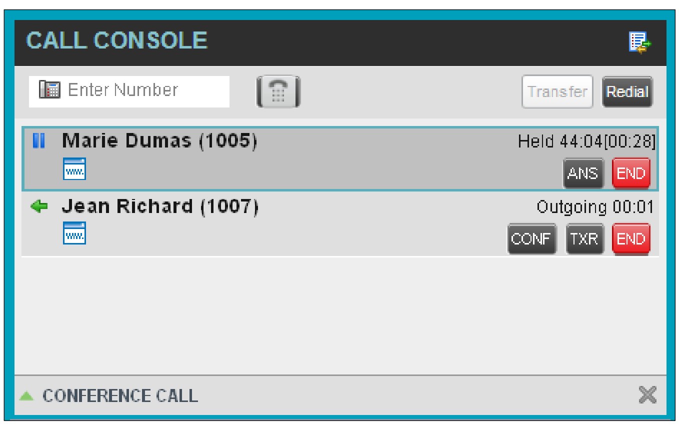


Figure 16 Call Console – Current Calls

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.

  For a recalled call, the following information appears:
  Recall: <Caller’s name>; via: <Call parked against user>
- Diversion CLID – This is the name (if available) of the party who diverted (transferred or forwarded) the call before you received the call and the phone number is 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.

- Redirection reason – This specifies why the call was redirected. When you move the mouse over the reason, a ToolTip appears providing more details on the reason for redirecting the call.
- Call State icon – This is a visual representation of the current state of the call. For more information, see section *5.2.5 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 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 *5.2.5 Call States and Actions* and *5.5.1 Call Action Buttons.*

5.2.4 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.

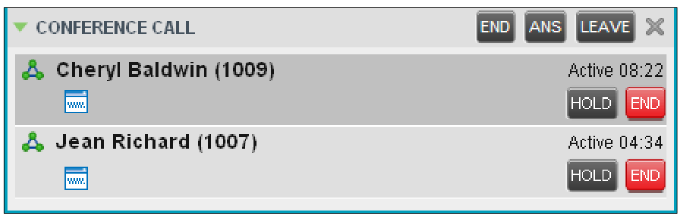


Figure 17 Conference Call Panel

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 *5.2.3 Current Calls*.

5.2.5 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

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

5.2.6 Call Redirection Reasons

The following table lists the possible reasons for redirecting calls.

Redirection Reason	Description
busy	The call was redirected to a specified destination because the Call Forwarding Busy was activated and the subscriber was busy. A subscriber is considered busy when there are too many active calls.
no answer	The call was redirected because the Call Forwarding No Answer service was activated and the subscriber did not answer within the specified number of rings.
unavailable	The call was redirected because the Call Forwarding Not Reachable service was activated and the subscriber's device was either unreachable or unregistered.
unconditional	The call was redirected because the Call Forwarding Always service was activated. When active, the Call Forwarding Always service redirects all incoming calls.
time of day	The call was redirected because the Call Forwarding selective service was activated and the incoming call matched the specified time of day value.
do not disturb	The call was redirected because the Call Forwarding Busy service was enabled and the Do Not Disturb service was activated.
deflection	The call was transferred before being answered.

Redirection Reason	Description
follow me	The call was redirected because one of the following services was activated: Simultaneous Ringing, Sequential Ringing, or Broadworks Anywhere.
out-of-service	The call was redirected by the network with the reason set to “out-of-office”.
away	The call was redirected by the network with the reason set to “away”.
transfer	The call was transferred after being answered.
voice mail	The call was redirected because the Call Forwarding Always to Voice Mail service was activated, the Call Forwarding Busy to Voice Mail service was activated, and the subscriber was busy, or the Call Forwarding No Answer to Voice Mail service was activated and there was no answer.
hunt group	The call was redirected to an agent by a hunt group.
call center	The call was redirected to an agent by a call center.
route point	The call was redirected to an agent by a route point.
unknown	The call was redirected for an unknown reason.

5.3 Contacts Pane

The *Contacts* pane contains your contact directories in a tabbed format and allows you to use your contacts to make or manage calls. For information on using contacts to manage calls, see section *6 Manage Calls*. For information about organizing and managing your contact directories, see section *8 Manage Contacts*.

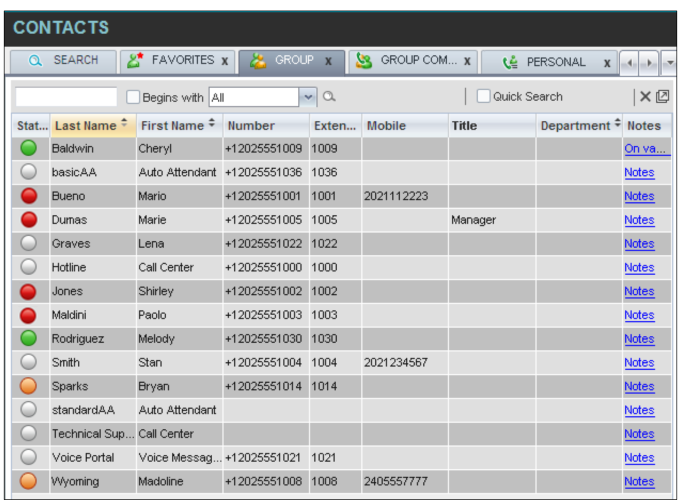


Figure 18 Receptionist Enterprise Contacts Pane

The *Contacts* pane contains the following areas:

- Directory Management Bar
- Directories List
- Search Tab
- Favorites Tab
- Group/Enterprise Tab
- Group/Enterprise Common Tab
- Monitored Contacts Tab (Enterprise Edition)
- Speed Dial Tab
- Queues Tab (Enterprise Edition)
- Search Results Tabs

The tabs you see depend on your Receptionist edition, system configuration, as well as the services assigned to you. For information, see section *3 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, which is described in the following subsections.

When you click a contact in any contact directory, the contact expands and the action buttons for the operations that you can currently perform on that contact, and in some cases additional information about the contact, appear.

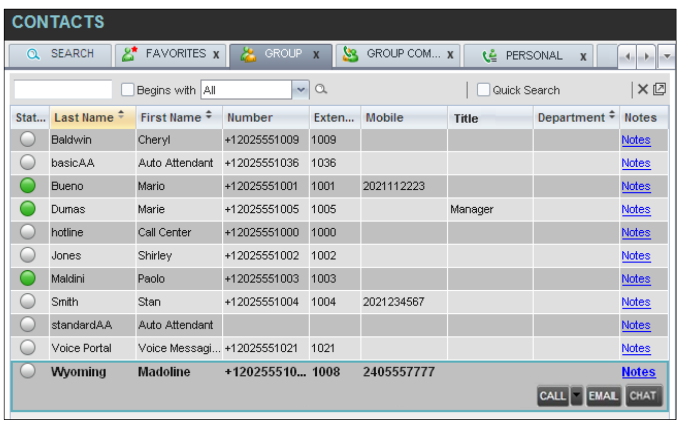


Figure 19 Group Tab – Contact in Focus with Action Buttons

For the list of action buttons available in Receptionist, see section *5.5.1 Call Action Buttons*.

5.3.1 Directory Management Bar

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

Figure 20 Directories Management Bar

For information on managing contact directories, see section *8 Manage Contacts*.

5.3.2 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. When the tabs to display do not fit in the window, scroll arrows appears  and allows you to scroll left and right to show hidden tabs.

For more information, see section *8.1 Show/Hide Directories*.

5.3.3 Search Tab

You use the *Search* tab to look for specific contacts in all your contacts. For information on performing directory searches, see section *8.3 Search Contacts*.

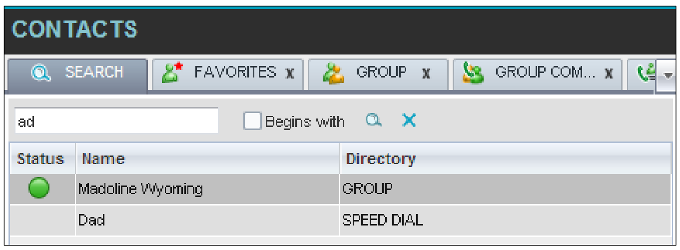


Figure 21 Contacts Pane – Search Tab

The search results can contain contacts from several directories, and the following information can be displayed for each contact (as applicable): phone state, IM&P state, contact name, and the directory where the contact was found.

5.3.4 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 (as applicable): call state, last and first name, phone number, extension, mobile number, department, and link to notes. The contacts to monitor must be configured. This is referred to as static monitoring. For more information, see section *9 Monitor Contacts*.

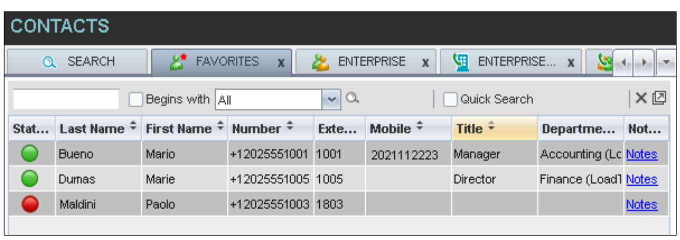


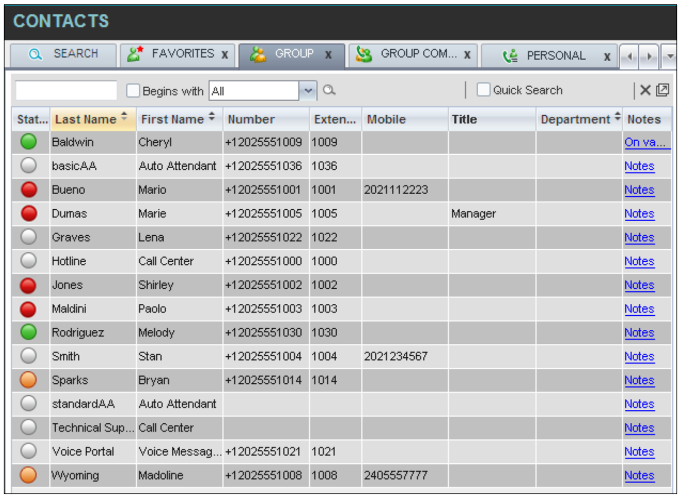
Figure 22 Contacts Pane – Favorites Tab

5.3.5 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: (as applicable): call state, last and first name, phone number, extension, mobile number, department, and link to notes.

If you have the Receptionist Enterprise edition, you can also monitor selected contacts without having to configure them. This is referred to as dynamic monitoring. For information, see section *9.2 Dynamic Monitoring (Enterprise Edition)*.



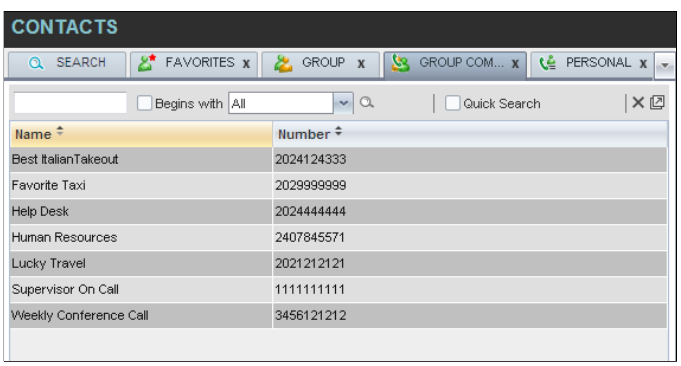
Stat...	Last Name	First Name	Number	Exten...	Mobile	Title	Department	Notes
	Baldwin	Cheryl	+12025551009	1009				On va...
	basicAA	Auto Attendant	+12025551036	1036				Notes
	Bueno	Mario	+12025551001	1001	2021112223			Notes
	Dumas	Marie	+12025551005	1005		Manager		Notes
	Graves	Lena	+12025551022	1022				Notes
	Hotline	Call Center	+12025551000	1000				Notes
	Jones	Shirley	+12025551002	1002				Notes
	Maldini	Paolo	+12025551003	1003				Notes
	Rodriguez	Melody	+12025551030	1030				Notes
	Smith	Stan	+12025551004	1004	2021234567			Notes
	Sparks	Bryan	+12025551014	1014				Notes
	standardAA	Auto Attendant						Notes
	Technical Sup...	Call Center						Notes
	Voice Portal	Voice Messag...	+12025551021	1021				Notes
	Wyoming	Madoline	+12025551008	1008	2405557777			Notes

Figure 23 Contacts Pane – Group Tab

5.3.6 Group/Enterprise Common Tab

The *Group/Enterprise Common* directory 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.

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



Name	Number
Best ItalianTakeout	2024124333
Favorite Taxi	2029999999
Help Desk	2024444444
Human Resources	2407845571
Lucky Travel	2021212121
Supervisor On Call	1111111111
Weekly Conference Call	3456121212

Figure 24 Contacts Pane – Group Common Tab

5.3.7 Monitored Contacts Tab (Enterprise Edition)

The *Monitored Contacts* directory contains the contacts that you are dynamically monitoring. When you start dynamically monitoring a contact, that contact is added to the *Monitored Contacts* directory. This directory is only visible if there are any dynamically monitored contacts. For more information, see section *9 Monitor Contacts*.

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

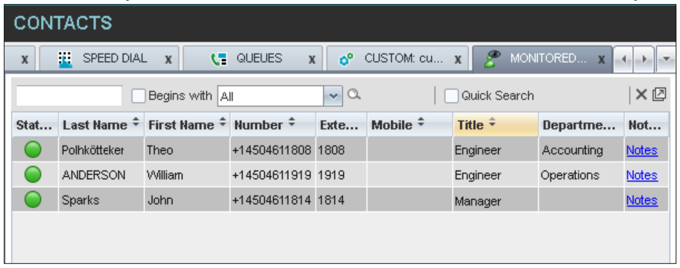


Figure 25 Contacts Pane – Monitored Contacts Tab

5.3.8 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.

You can edit your speed dial entries in Receptionist. For information about managing your speed dial entries, see section *8.7 Manage Speed Dial Entries*.

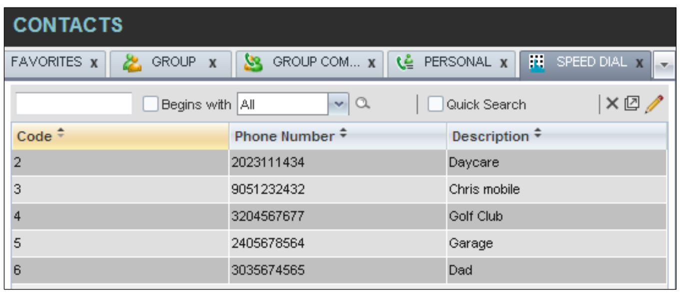


Figure 26 Contacts Pane – Speed Dial Tab

The information displayed for each contact includes the speed dial code, phone number, and description, as you configured them.

5.3.9 Queues Tab (Enterprise Edition)

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.

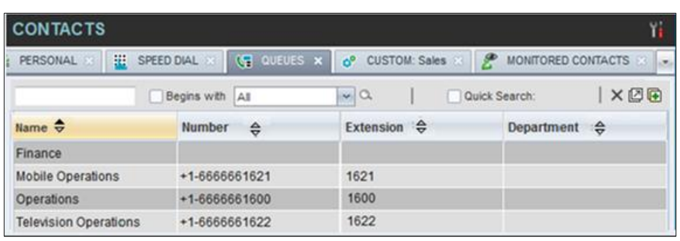


Figure 27 Contacts Pane – Queues Tab

The information displayed for each queue includes the name, phone number, extension, and department (as applicable).

The Group button allows you to group (and ungroup) queues by call center.

5.3.10 Search Results Tabs

When you perform a search on a directory, you can keep the results of the search 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 directory icon has an arrow similar to the arrow used on shortcut icons .

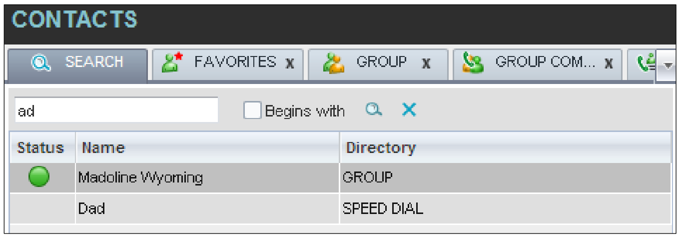


Figure 28 Contacts Pane – Search Results Tab

NOTE: A search results directory has the same properties as the original directory, and you can perform the same operations on contacts in a search results directory as in the original directory.

You can perform a search on a search results directory and keep the results under another tab. The number of search results directories you can create is limited to ten.

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

5.4 Queued Calls Pane (Enterprise Edition)

You use the *Queued Calls* pane to manage queued calls in the selected call centers. For more information about managing queued calls, see section *11 Manage Queued Calls (Enterprise Edition)*.

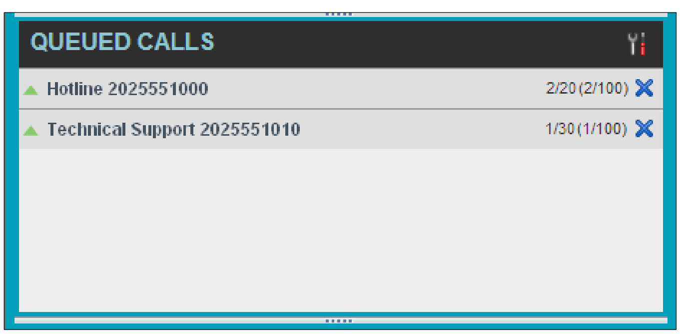


Figure 29 Queued Calls Pane

The pane lists queued calls for the selected call centers. For information on selecting call centers to display, see section *11.1 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 30 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 (Premium Call Center).
- 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 *5.5.1 Call Action Buttons*.

5.5 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 *5.5.1 Call Action Buttons*.

The following table lists the general controls used in Receptionist and the controls displayed on the headers in the panels, windows, or tabs.

Name	Description
Common Controls	
Options	This allows you to organize items in lists.
Expand/Collapse	This shows or hides the contents of a window, panel, or tab.
Close	This closes an interface element, such as window, pane, tab, or panel.
Edit	This allows you to edit contacts in some directories.
Call Console Controls	
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.
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.
Pull Out	This places directory search results in a new tab.
Clear Search	This clears the search results.
Group Queues	This groups queues by call center.
Call Notification Pop-up Window	

Name	Description
 Transfer to Voice Mail	This transfers an incoming call to your voice mail.

5.5.1 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 only when you move the mouse over that entry and when the corresponding action can be performed on that entry (with the exception of the Mon button on virtual user entries).

NOTE: Virtual users cannot be monitored even when the Mon button appears on expanded virtual user entries.

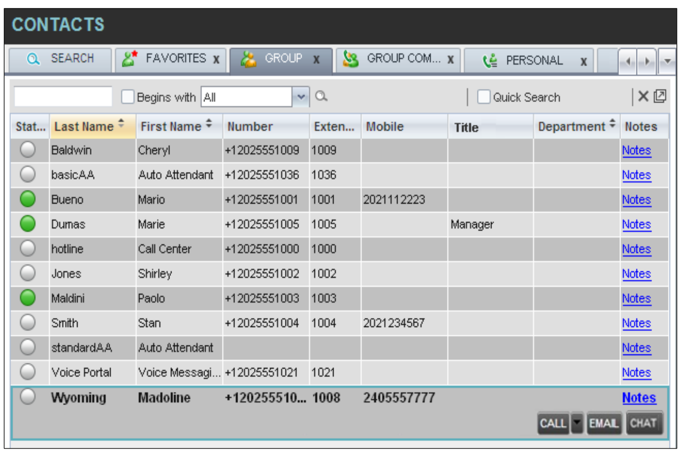
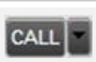
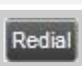


Figure 31 Group Directory – Contact in Focus with Action Buttons

The following table lists action buttons available in Receptionist.

Button	Description
 Dial	This dials the number you entered in the *Dialer*.
 Call	This places a call to the selected contact or to a number from Call History. This button is used when there is only one number available for the contact.
 split Call	When there is more than one number available for a contact, the split Call button is displayed for the contact. Clicking the Call button, places a call to the default destination number of the contact. Clicking the drop-down arrow (the right Call button), displays the list of available numbers for the contact. Selecting a number places a call to that number.
 Redial	This redials the last dialed number.

Button	Description
MOB Mobile	This dials the contact's mobile number.
EMAIL 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 Transfer	This transfers a call to an ad hoc number entered in the Dialer.
TXR Transfer	This transfers a call to a selected number or contact. This button is used when there is only one number available for the contact.
TXR split Transfer	When there is more than one number available for a contact, the split Transfer button is displayed for the contact. Clicking the Transfer button, transfers the call to the default destination number of the contact. Clicking the drop-down arrow (the right Transfer button), displays the list of available numbers for the contact. Selecting a number transfers the call to that number.
VM Transfer to Voice Mail	This transfers a call to the selected contact's voice mail.
ANS Answer	This answers an incoming call, answers an unanswered call for a contact, or resumes a held call.
HOLD Hold	This places a call on hold.
END End	This ends a call.
CONF Conference	This establishes a conference call or adds a call to a conference.
CAMP Camp	This camps the call on a busy contact.
BARGE Barge In	This barges in on a contact's call.
PARK Park	This parks a call on a contact.
MON Monitor	This starts monitoring the state of the selected contact, except if the contact is a virtual user. Virtual users cannot be monitored.
PROMOTE Promote	This promotes a selected call to the next higher priority bucket.
RETRIEVE Retrieve	This retrieves a selected call from the queue to the supervisor's device.
REORDER Reorder	This changes a selected call's position in the queue.
Delete Call Log	This deletes a call log from Call History.

6 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.

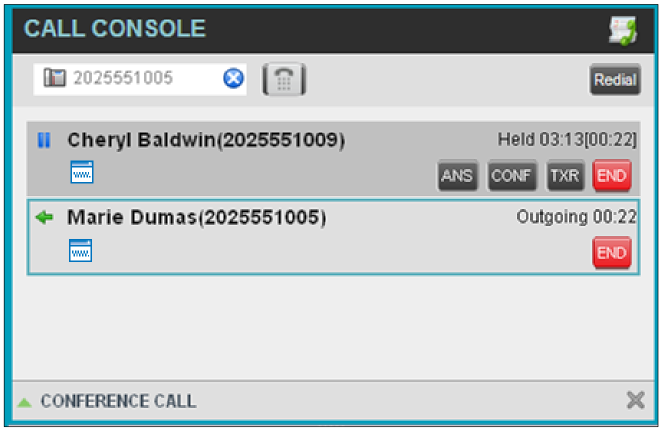


Figure 32 Call Console

6.1 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 contact's 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, then 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*.

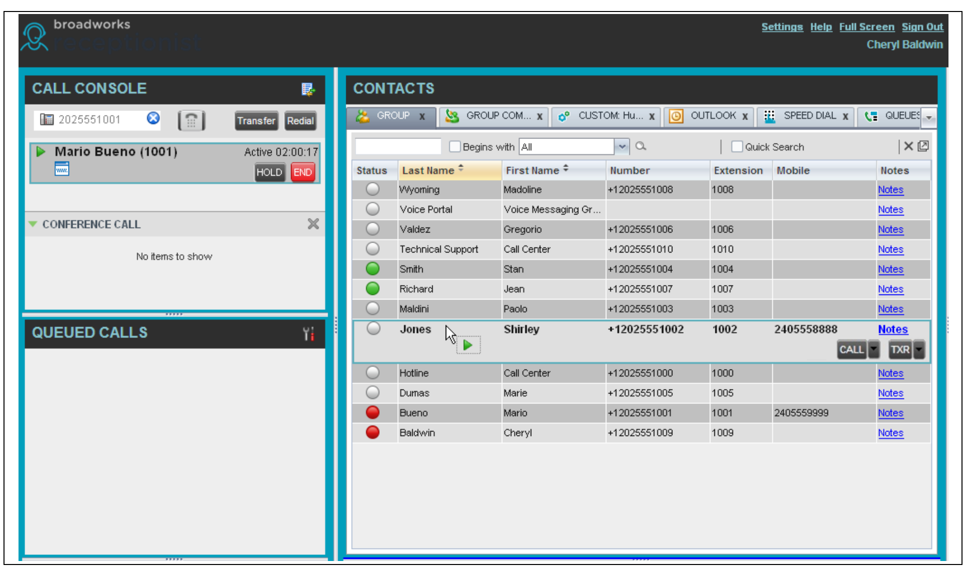


Figure 33 Drag Call and Drop Call on Contact

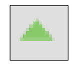
6.2 View Call Information

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.

6.2.1 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 .

6.2.2 View Incoming Call Details

If the Call Notification feature is enabled, 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

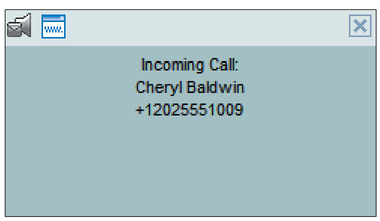


Figure 34 Call Notification Pop-up Window for Non-ACD Call

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

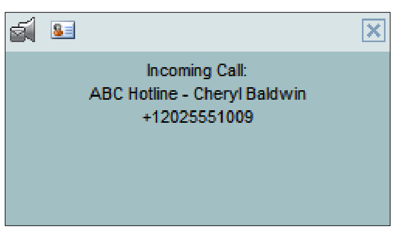


Figure 35 Call Notification Pop-up Window – Call from Call Center

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

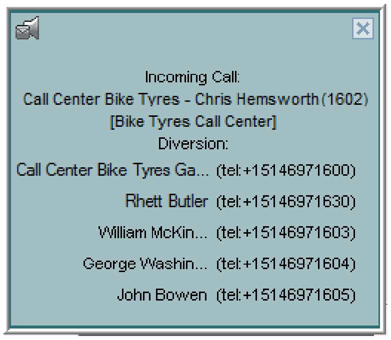


Figure 36 Call Notification Pop-up Window with Diversion Information

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.

6.3 Answer 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.

6.3.1 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.

6.3.2 Pick Up Call

The Directed Call Pickup service allows you to answer a call that is incoming on 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) Expand your *Group/Enterprise* or *Favorites* directory and click the target contact to expand it. The contact's state must be *Ringing*.

1) Move the mouse over the contact and click **Answer** ANS.

   The call appears as *Incoming* in the *Call Console*.

6.4 Hold and Resume Calls

You can only put an active call on hold.

6.4.1 Put Call on Hold

To put a call on hold:

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

6.4.2 Resume Held Call

To resume a held call:

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

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

6.5 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.*

6.5.1 Dial Ad Hoc Number

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

Figure 37 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*.

6.5.2 Redial Number

Receptionist keeps up to 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.

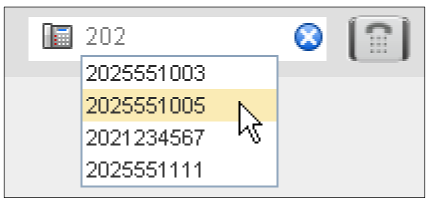


Figure 38 Dialer – Select Recently Dialed Number

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.

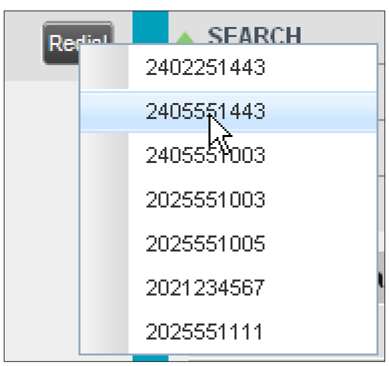


Figure 39 Dialer – Redial Number

6.5.3 Dial Contact

You can dial contacts from any directory available in Receptionist.

To dial a contact:

1) In the *Contacts* pane, expand 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.

![broadsoft logo]

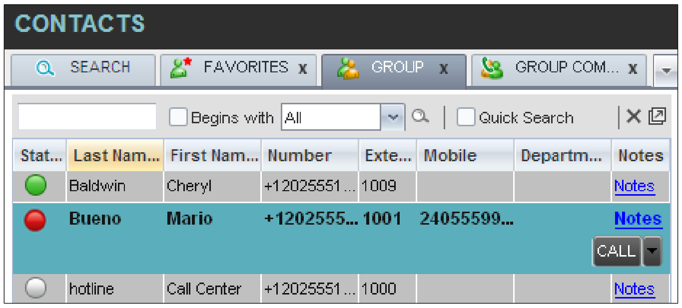


Figure 40 Group Directory – Contact in Focus with Split Call Button

3) Answer the phone. An outbound call is placed.

4) Alternatively, to dial the contact's alternate number, if available, click the **right Call** button and select the number from the list.

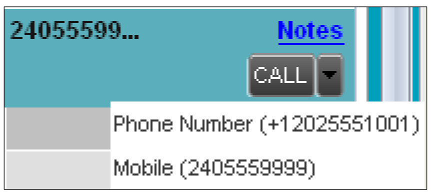


Figure 41 Split Call Button – List of Contact's Alternate Numbers

6.5.4 Speed Dial

To speed dial a contact:

1) In the *Contacts* pane, click the **Speed Dial** tab.

2) Click the contact to expand it and click **Call** **.**

6.5.5 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.

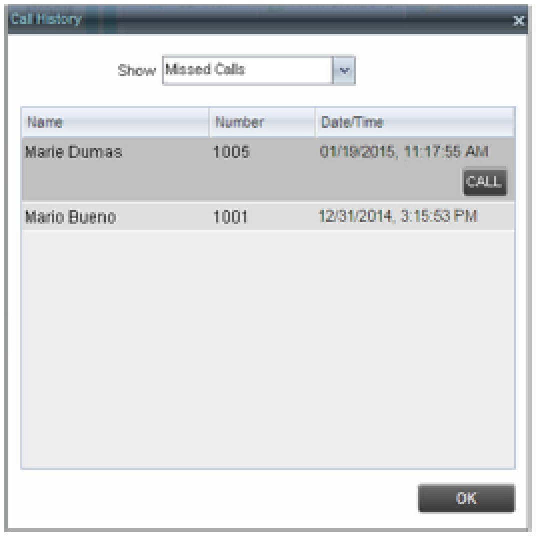


Figure 42 Call History Dialog Box

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** 

.

6.6 End Call

To end a call:

Click **End** 

for that call.

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

6.7 Transfer Calls

There are a number of ways that 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.

6.7.1 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.

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

6.7.2 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** .

6.7.3 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*.

6.7.4 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, expand the *Group/Enterprise* or *Favorites* directory and find the 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** .

6.7.5 Transfer to Queue (Enterprise Edition)

You can transfer a current call to any queue that appears in your *Queues* tab. 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.

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.

6.8 Park and Camp 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, then the call is recalled and it reappears in your *Call Console*.

6.8.1 Conduct Busy Camp On (Enterprise and Small Business Editions)

Busy Camp On allows you to place a call at 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 *Ringing*.

> **NOTE**: To use the feature, you must 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 *Ringing* 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*.

6.8.2 Conduct Group Call Park (Enterprise Edition)

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*.

6.9 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.

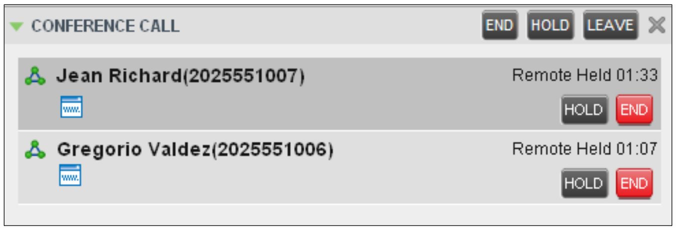


Figure 43 Call Console – Conference Call Panel

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.

6.9.1 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 *6.5 Make and End Calls*.

2) In the *Call Console,* select one of the two calls.

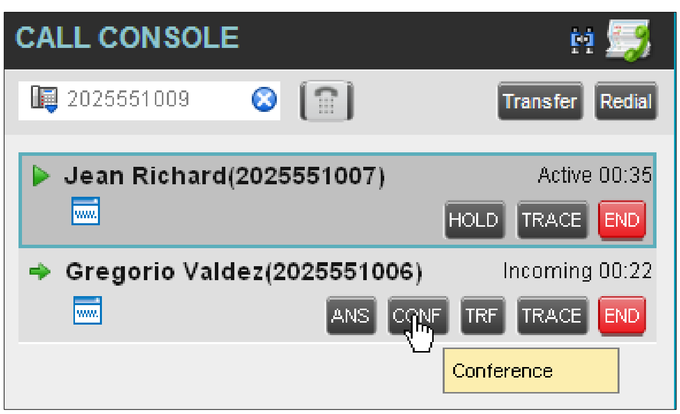


Figure 44 Start Conference

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.

6.9.2 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 *6.5 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.

6.9.3 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.

6.9.4 Resume Held Conference

To resume a held conference:

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

6.9.5 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**.

6.9.6 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**.

6.9.7 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.

6.9.8 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**.

6.9.9 End Conference

To end the conference:

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

6.9.10 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) Expand the *Group/Enterprise* or *Favorites* directory.
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.

7 Message Contacts (Enterprise Edition)

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.

7.1 Send E-mail to Contact

To send an e-mail message to a contact:

1) In the *Group/Enterprise*, *Favorites, or Monitored Contacts* directory, click the contact that has an e-mail address configured.

2) Click the **E-mail** button 

for the contact. This shows a new e-mail window for the configured Messaging service.

3) Type your message and click **Send**.

8 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.

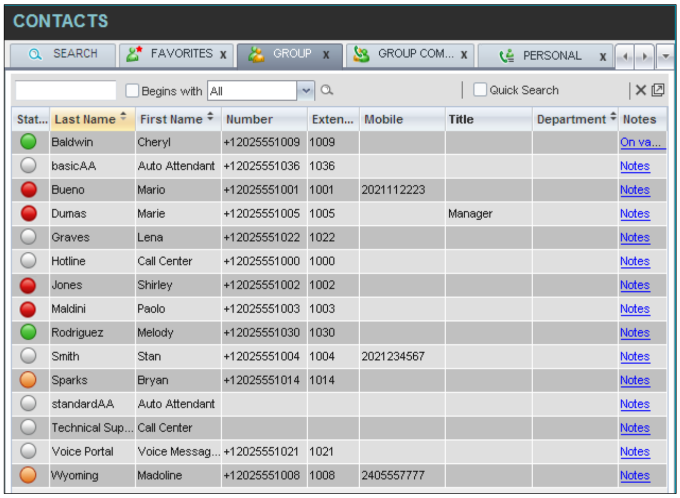


Figure 45 Contacts Pane

For the list of contact directories available in your version of Receptionist, see section *3 Introduction to Receptionist*.

This section describes the directories management functions provided by Receptionist:

- Show/Hide Directories
- View Directory Content
- Search Contacts
- Order Directory Entries
- Make Notes about Contact (Enterprise Edition)
- Manage Personal Contacts
- Manage Speed Dial Entries

8.1 Show/Hide Directories

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

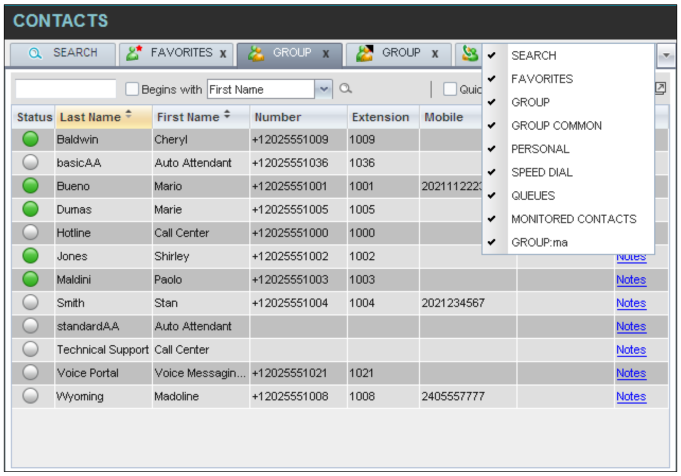


Figure 46 Contacts Pane – Expanded Directories List

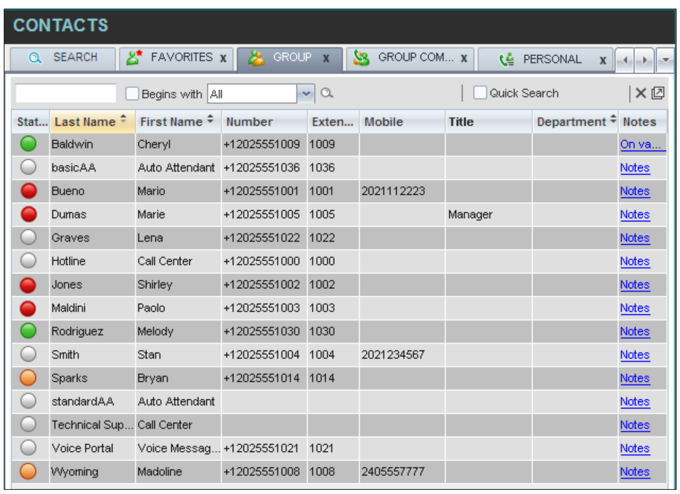


Figure 47 Contacts Pane with Contact Tabs Scroll Arrows

To display or hide 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 selected directory appears and its tab is displayed at the top of the *Contacts* pane.

   To hide a directory tab, click the **Close** button on that directory's tab.

   Note that once you close a directory containing search results, you cannot display it again by selecting it from the list.

3) To display a directory tab that is selected but not visible, click one of the scroll arrows to move left or right until the directory tab you are looking for becomes visible.

8.2 View Directory Content

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

To view contacts in a directory:

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

To view additional information about a contact:

Click the contact to view. For more information about the action buttons, see section *5.5.1 Call Action Buttons*. For more information about the contact's calendar, see section *9.4 Monitored Contact's Calendar (Enterprise and Small Business Editions)*.

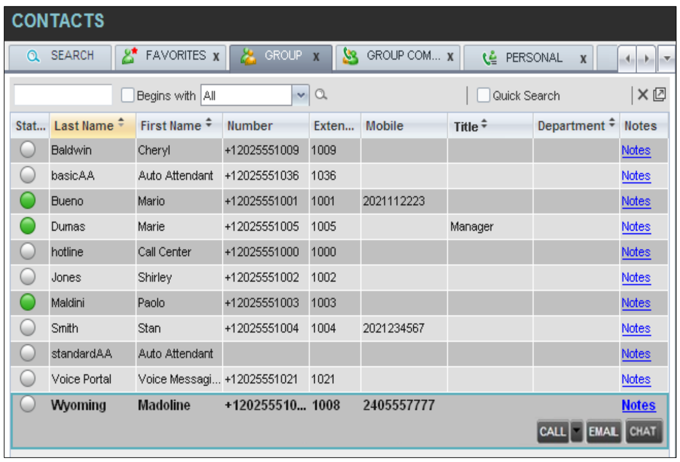


Figure 48 Group Directory – Contact Details

Only one contact can be expanded at a time. When you click a contact, the system automatically hides the details of the previously expanded contact.

8.3 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 regular search or a quick search, and you can create a new directory from search results.

You use the following procedures to search for contacts:

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

8.3.1 Perform Quick Search

A quick search searches on a specific column in a selected directory 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, but is not available in the *Search* tab.

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

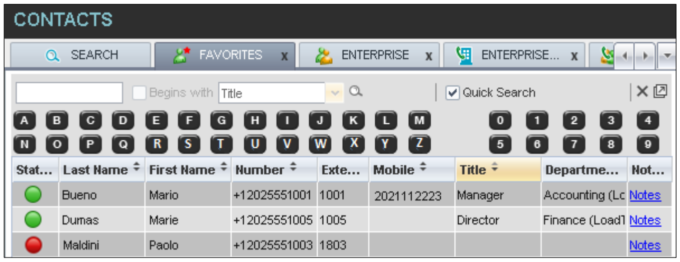


Figure 49 Contacts Pane – Perform Quick Search

To perform a quick search:

1) Click the directory tab where you want to perform the search.

2) Order the directory by the column on which you want to perform the search.

3) Check the *Quick Search* box.

4) From the keypad that appears, select a character (a single letter or digit) by which you want to 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.

8.3.2 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 always performed on all directories and columns.

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

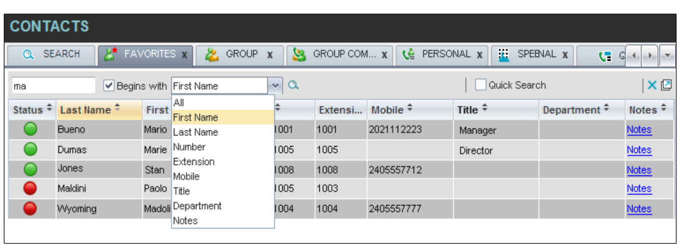


Figure 50 Contacts Pane – Perform Regular Search

To search in a specific directory:

1) Select the directory.

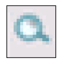
2) Make sure that the *Quick Search* box is unchecked.

3) In the *Search* text box, enter the text for which you want to search. 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 also include contacts that contain the entered string.

5) From the drop-down list, select the column by which you want to search. 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.

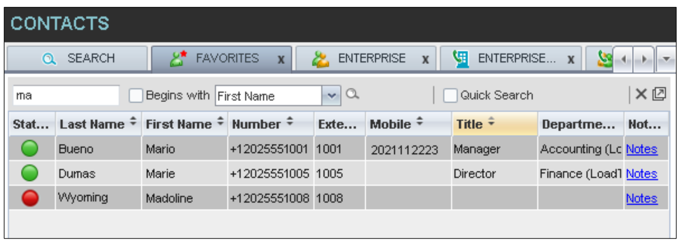


Figure 51 Contacts Pane – Search Results

   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".

7) To clear the search results, click **Reset** .

To search in all directories:

1) Click the **Search** tab.

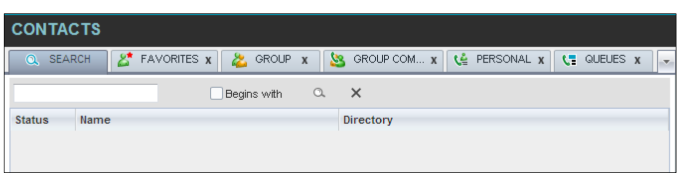


Figure 52 Perform Search Using Search Tab

2) In the *Search* text box, enter the text for which you want to search. 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.

3) To restrict the search to contacts that start with the entered string, check the *Begins with* box. Otherwise, the search results 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.

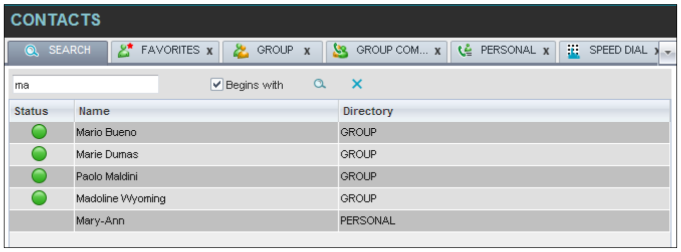


Figure 53 Contacts Pane – Search Results in Search Tab

5) When you click a contact, the entry expands displaying contact details. The information depends on the directory for which 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.

8.3.3 Create Directory from Search Results

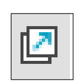
When you perform a search in a directory, you can create a new directory from the search results, using the Pullout button. The button is enabled when a search is performed on a single field.

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 enter the search criteria.

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 operations directly from the search results.

8.3.4 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 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.

8.4 Order Directory Entries

Receptionist allows you to order directory entries is ascending or descending order. The columns by which 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, Department	Last Name
Favorites	First Name, Last Name, Number, Mobile, Extension, Notes, Department, Status, IM, Title	Last Name
Group/Enterprise Common	Name, Number	Name
Personal	Name, Number	Name
Speed Dial	Code, Description, Number	Code
Queues	Name, Number, Extension, Department	Name
Monitored Contacts	First Name, Last Name, Number, Mobile, Extension, Notes, Department, Status, IM, Title	Last Name

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

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 *12.6 Monitored User States*.

The sorting order for the IM column is as follows (from highest to lowest): Busy, Away, Available, Offline, Pending Subscription, Not subscribed.

To order a directory:

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

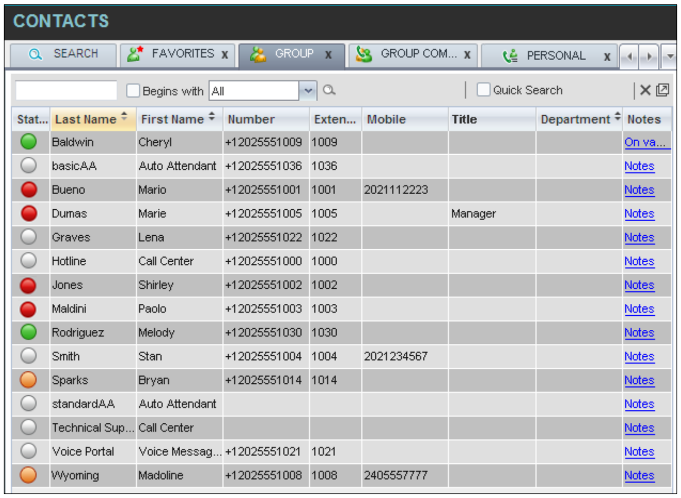


Figure 54 Sort Directory

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.

8.5 Make Notes about Contact (Enterprise Edition)

Receptionist Enterprise allows you to make notes about the contacts in your *Group/Enterprise, Favorites,* or *Monitored Contacts* directory.

To make a note about a contact:

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

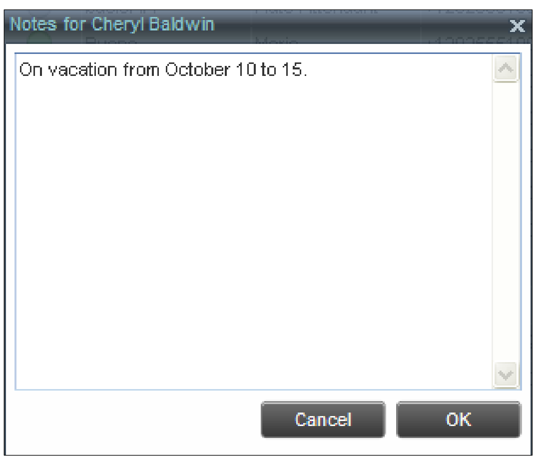


Figure 55 Notes for Cheryl Baldwin Dialog Box

2) Enter the desired text or view or modify the existing text in the *Notes* text box.

3) To save your changes and close the dialog box, click **OK**.

   To close the dialog box without saving, click **Cancel**.

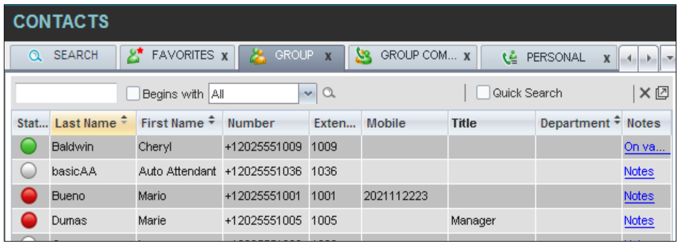


Figure 56 Group Directory – Contact Notes

8.6 Manage Personal Contacts

You can add or remove personal contacts in Receptionist.

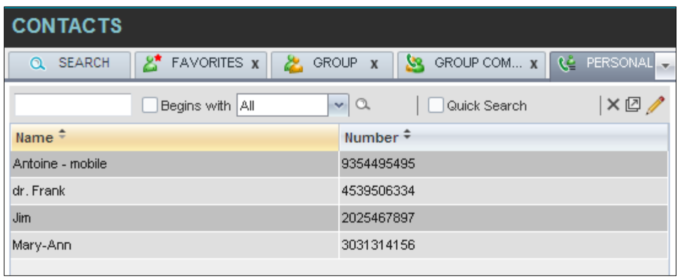


Figure 57 Personal Tab

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.

8.6.1 Add Personal Contact

To add a personal contact:

1) In the *Personal* tab, 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.

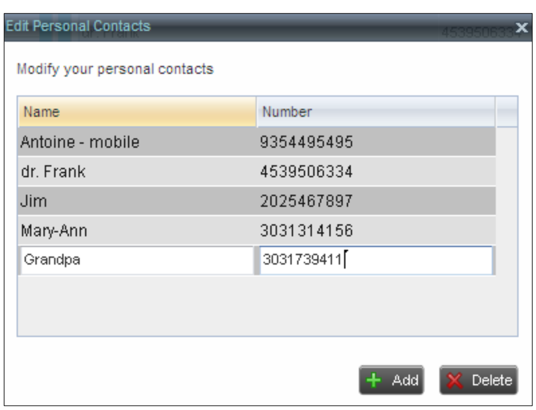


Figure 58 Edit Personal Contacts Dialog Box – Add Entry

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.

8.6.2 Delete Personal Contact

To delete a speed dial entry:

1) In the *Personal* tab, click **Edit** . The *Edit Personal Contacts* dialog box appears.

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

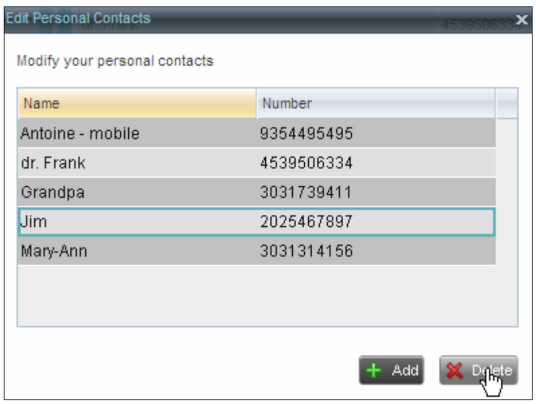


Figure 59 Edit Personal Contacts Dialog Box – Delete Entry

8.7 Manage Speed Dial Entries

This directory is available in all editions of Receptionist. It 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.

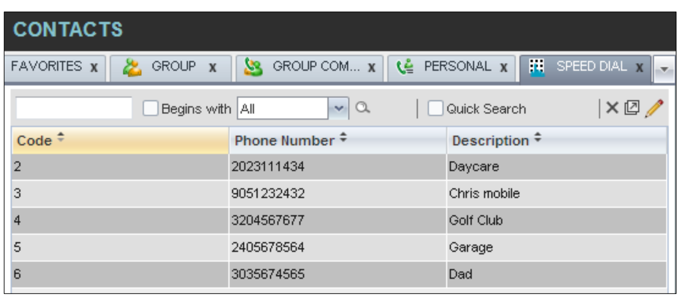


Figure 60 Speed Dial Tab

You can add or remove entries via the Receptionist client, and the updates appear in both places.

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

- Add Speed Dial Entry
- Modify Speed Dial Entry
- Delete Speed Dial Entry

8.7.1 Add Speed Dial Entry

To add a speed dial entry:

1) In the *Speed Dial* tab, 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.

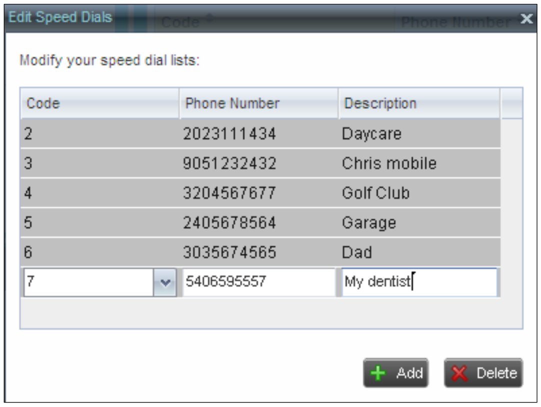
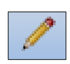


Figure 61 Edit Speed Dials Dialog Box – Add Entry

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.

8.7.2 Modify Speed Dial Entry

To modify a speed dial entry:

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

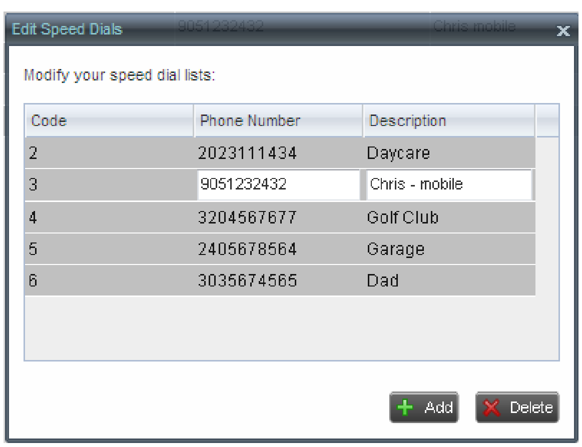


Figure 62 Edit Speed Dials Dialog Box – Modify Entry

3) Modify information as required.

4) To save the changes, click anywhere in the dialog box outside the entry.

8.7.3 Delete Speed Dial Entry

To delete a speed dial entry:

1) In the *Speed Dial* tab, click **Edit** . The *Edit Speed Dials* dialog box appears.

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

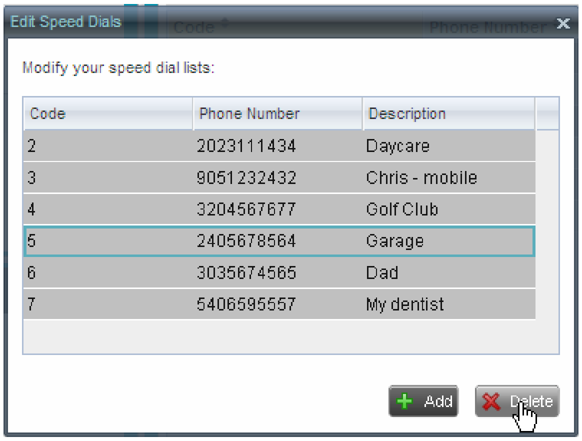


Figure 63 Edit Speed Dials Dialog Box – Delete Entry

9 Monitor Contacts

Receptionist allows you to monitor the call state of selected contacts. All editions of Receptionist allow you to monitor contacts that have been configured. This is referred to as static monitoring. In addition, Receptionist Enterprise allows you to monitor selected contacts dynamically.

The following table summarizes the monitoring capabilities of the different editions of Receptionist:

Edition	Description
Enterprise	This is the static monitoring of up to 200 contacts and the dynamic monitoring of a configurable number of contacts enterprise-wide. The maximum number of contacts you can dynamically monitor is configured by your administrator and it cannot exceed 100.
Small Business	This is the static monitoring of up to 30 contacts enterprise-wide.
Office	This is the static monitoring of up to 8 contacts group-wide.

You use the *Favorites* tab to view the phone state of statically monitored contacts and the *Group/Enterprise* tab 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 (Enterprise Edition)
- Request Dynamic Monitoring
- Monitored Contact's Calendar (Enterprise and Small Business Editions)
- Contact States

9.1 Static Monitoring

To statically monitor contacts, the list of contacts to monitor must be configured. 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.

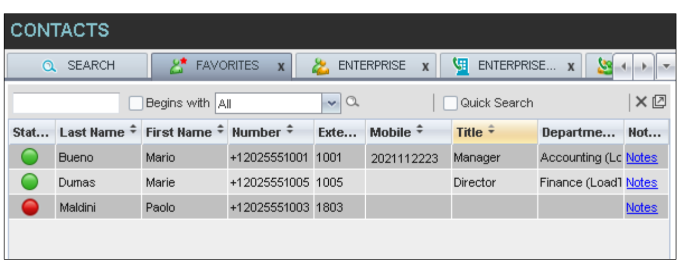


Figure 64 Favorites Directory with Monitored Contacts

9.2 Dynamic Monitoring (Enterprise Edition)

Dynamic Monitoring allows you to view the call state of selected contacts in your *Group/Enterprise, Search,* and *Monitored Contacts* directories. When you start dynamically monitoring a contact, that contact is added to the *Monitored Contacts* directory. This directory is only visible if there are any dynamically monitored contacts.

You must request that a contact be monitored. Depending on the client customization, you may or may not be able to manually stop monitoring a contact. When the number of monitored contacts reaches the maximum limit, the system will either ask your permission to stop monitoring the oldest one (fourth) of the currently monitored contacts or will ask you to unselect one or more contacts yourself. The state of a contact that is not monitored is shown as *Unknown*.

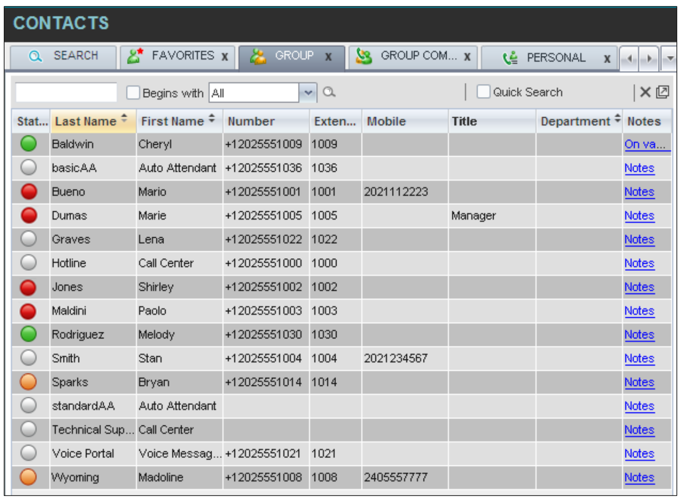


Figure 65 Group Directory with Monitored Contacts

NOTE: If a contact in your *Enterprise/Group* directory is statically monitored, then their phone state is displayed without the need to explicitly request dynamic monitoring; however, it counts toward the total number of dynamically monitored contacts.

9.3 Request Dynamic Monitoring (Enterprise Edition)

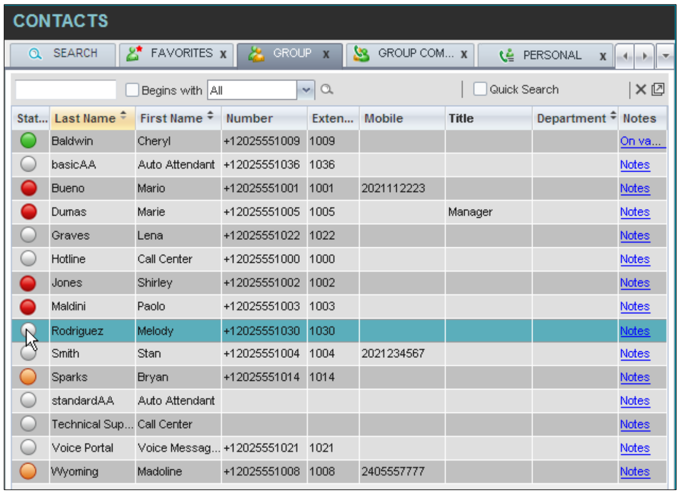
The set of contacts that you dynamically monitor is stored as part of your context information and automatically retrieved and activated on subsequent sign-ins.

To monitor a contact:

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

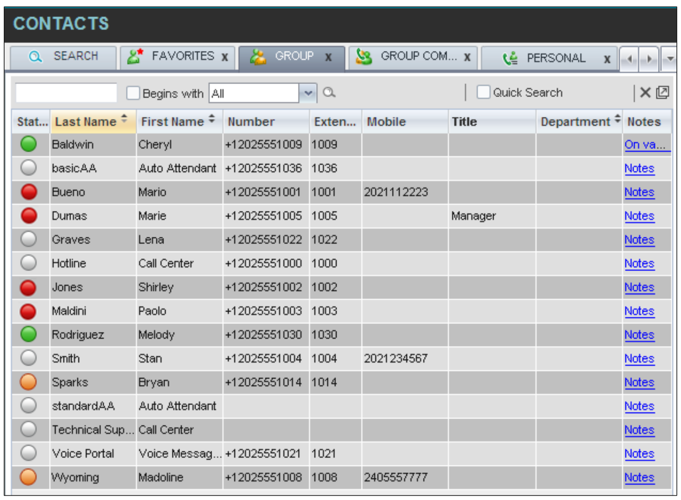
The contact is also added to the *Monitored Contacts* directory and the contact's state is displayed in the *Group/Enterprise*, *Search*, and *Monitored Contacts* directories.

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



Stat...	Last Name	First Name	Number	Exten...	Mobile	Title	Department	Notes
	Baldwin	Cheryl	+12025551009	1009				On va...
	basicAA	Auto Attendant	+12025551036	1036				Notes
	Bueno	Mario	+12025551001	1001	2021112223			Notes
	Dumas	Marie	+12025551005	1005		Manager		Notes
	Graves	Lena	+12025551022	1022				Notes
	Hotline	Call Center	+12025551000	1000				Notes
	Jones	Shirley	+12025551002	1002				Notes
	Maldini	Paolo	+12025551003	1003				Notes
	Rodriguez	Melody	+12025551030	1030				Notes
	Smith	Stan	+12025551004	1004	2021234567			Notes
	Sparks	Bryan	+12025551014	1014				Notes
	standardAA	Auto Attendant						Notes
	Technical Sup...	Call Center						Notes
	Voice Portal	Voice Messag...	+12025551021	1021				Notes
	Wyoming	Madoline	+12025551008	1008	2405557777			Notes

Figure 66 Group Directory – Request Contact Monitoring



Stat...	Last Name	First Name	Number	Exten...	Mobile	Title	Department	Notes
	Baldwin	Cheryl	+12025551009	1009				On va...
	basicAA	Auto Attendant	+12025551036	1036				Notes
	Bueno	Mario	+12025551001	1001	2021112223			Notes
	Dumas	Marie	+12025551005	1005		Manager		Notes
	Graves	Lena	+12025551022	1022				Notes
	Hotline	Call Center	+12025551000	1000				Notes
	Jones	Shirley	+12025551002	1002				Notes
	Maldini	Paolo	+12025551003	1003				Notes
	Rodriguez	Melody	+12025551030	1030				Notes
	Smith	Stan	+12025551004	1004	2021234567			Notes
	Sparks	Bryan	+12025551014	1014				Notes
	standardAA	Auto Attendant						Notes
	Technical Sup...	Call Center						Notes
	Voice Portal	Voice Messag...	+12025551021	1021				Notes
	Wyoming	Madoline	+12025551008	1008	2405557777			Notes

Figure 67 Group Directory – Monitored Contact

When the number of monitored contacts reaches the maximum limit, one of the following messages appears depending on your client configuration.

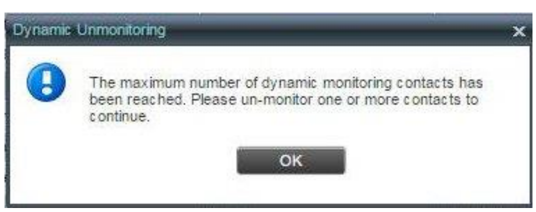


Figure 68 Dynamic Unmonitoring Dialog Box

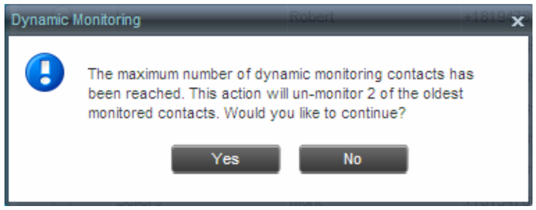


Figure 69 Dynamic Monitoring Dialog Box

If your system allows you to unselect monitored contacts, unselect the contacts you no longer want to monitor and select new contacts for monitoring.

If your system does not allow you to unselect monitored contacts, click **Yes** to allow the system to stop monitoring the oldest one (fourth) of the currently monitored contacts and start monitoring the contact you requested, or click **No** to cancel the request.

9.4 Monitored Contact's Calendar (Enterprise and Small Business Editions)

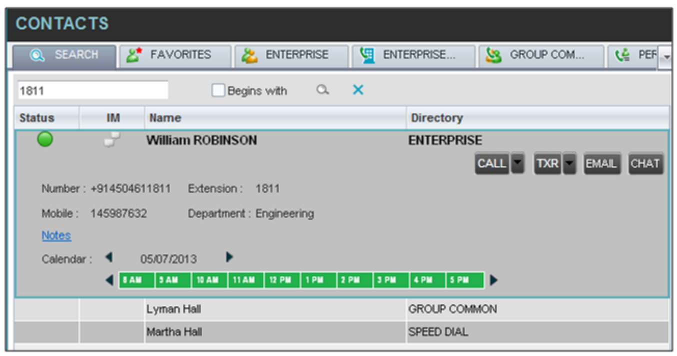


Figure 70 Contacts Pane – Monitored User's Calendar Details

The calendar is divided into one-hour blocks. Those blocks can be displayed in red (when the user is busy), green (when the user is free), or partly in red and partly in green (when the user is busy only during part of the one hour block). When you move the mouse over a partially busy time block, the ToolTip shows the meeting's start and end time (for example, 9:00 AM to 9:30 AM).

By default, the calendar displays the time between 8:00 AM and 6:00 PM for the current day. You can change the date and the time displayed on the calendar, by using the Back and Forward buttons. Clicking the button shifts the displayed time period by one day/hour. The calendar details are displayed in the time zone of your local machine.

9.5 Contact States

The state of a monitored 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, Personal Assistant, and Privacy.

The following table lists the possible contact states.

Icon	State in Receptionist	DND	CFA	Privacy	Personal Assistant	Call State
	Private	N/A	N/A	On	N/A	N/A
	On a Call	N/A	N/A	Off	N/A	Active call

Icon	State in Receptionist	DND	CFA	Privacy	Personal Assistant	Call State
	Ringing	N/A	N/A	Off	N/A	Ringing call, no active calls
	Away	N/A	N/A	Off	N/A	No active calls
	Away	N/A	N/A	Off	Any state except None, Meeting, or Training,	No active calls
	In a Meeting	N/A	N/A	Off	N/A	No active calls
	In a Meeting	N/A	N/A		Meeting or Training	No active calls
	Call Forwarding Always	N/A	On	Off	N/A	No active calls
	Do Not Disturb	On	Off	Off	N/A	No active calls
	Available	Off	Off	Off	None	No active calls

NOTE: When a contact enables Privacy, this terminates monitoring of the contact's state for the current login session. To be able to monitor their state again, you must sign out and then sign in after the contact has disabled Privacy.

When you place the mouse over the Status icon of a monitored contact, a ToolTip appears providing additional information, as applicable. The ToolTip displays the information about the state that has the highest precedence. For example, if a monitored contact enables Privacy, the ToolTip displays "Private" independent of whether the contact is on a call, in a meeting, or away. See the following table for information about ToolTip messages displayed for a contact in the different states.

ToolTip Message	State in Receptionist	Additional Conditions
Private	Private	
On a Call	On a Call	
Ringing	Ringing	
Away	Away	Contact's calendar shows Out of Office
<Contacts's first an last name> is on a business trip/gone for the day/at lunch/out of the office/temporarily out/on vacation/unavailable [until <date/time>]	Away	Contact's calendar shows Free or Tentative and their Personal Assistant is set to any state except None, Meeting, or Training
In a Meeting	In a Meeting	Contact's calendar shows Busy

ToolTip Message	State in Receptionist	Additional Conditions
<Contacts’s first an last name> is in a meeting/training [until <date/time>]	In a Meeting	Contact's calendar shows Free or Tentative and their Personal Assistant is set to Meeting or Training
Call Forwarding Always	Call Forwarding Always	
Do Not Disturb	Do Not Disturb	
Available	Available	

10 Manage Call History

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

10.1 View Call History

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

NOTE: The format in which date and time are displayed in the *Call History* dialog box depends on the date and time settings selected on the *Settings – General* configuration page. For details, see section *12.1.3 Date Format* and *12.1.4 Time Format*.

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.

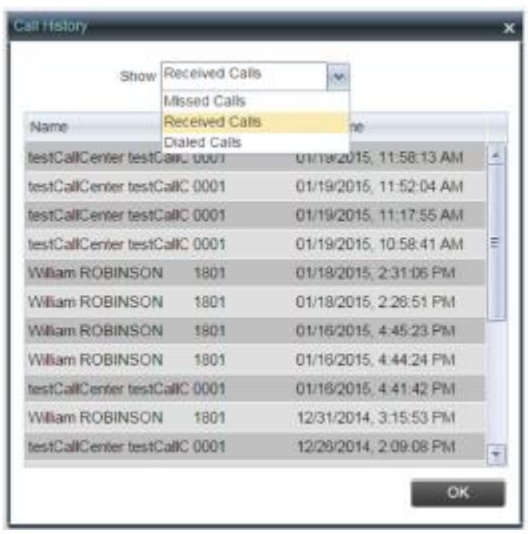


Figure 71 Call History Dialog Box

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

10.2 Delete Call History

You can 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** 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.

11 Manage Queued Calls (Enterprise Edition)

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 have the Receptionist – Enterprise license assigned and either you are assigned to a call center (as a supervisor or agent) or you have the Supervisor license assigned.

Figure 72 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 (Premium Call Center)
- Promote Call in Queue (Premium Call Center)
- Group Calls
- Order Queued Calls

11.1 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.

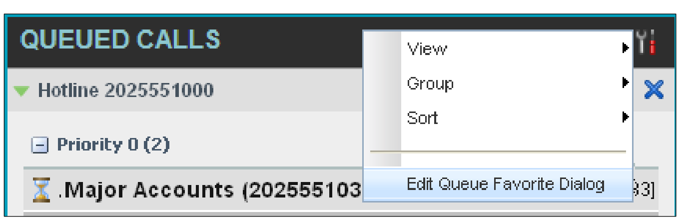


Figure 73 Queued Calls – Options – Edit Queue Favorite Dialog

The *Edit Queue Favorites* dialog box appears.

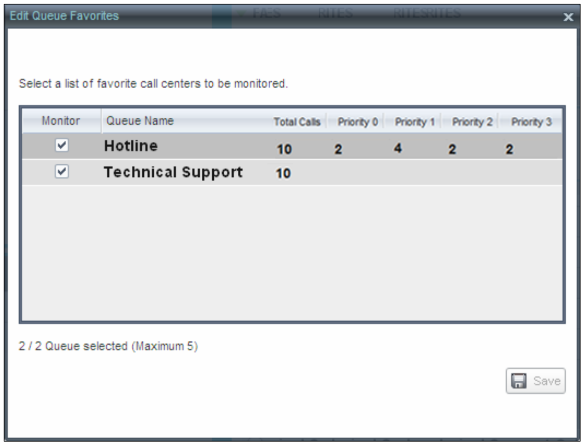


Figure 74 Edit Queue Favorites Dialog Box

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.

11.2 Modify Number of Calls to Display

For each Standard call center that you are monitoring, you can modify the maximum number of calls to be displayed. For each Premium 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.

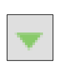
1) In the *Queued Calls* pane, click **Options**  and select the *Edit Queue Favorite Dialog* option. The *Edit Queue Favorites* dialog box appears.

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.

11.3 View Queued Calls

To view calls in a queue:

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

11.4 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.

11.5 Transfer Call to Ad Hoc Number

To transfer a call to an ad hoc number:

1) In the *Queued Calls* pane, select the call.

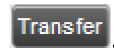
2) In the *Dialer*, enter the destination number and click **Transfer** 
.

Figure 75 Ad Hoc Queue Transfer

The call is transferred and removed from the queue.

11.6 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, expand the *Queues* tab.

3) Click the target queue and click **Transfer** 
 for that queue.

   The call is transferred and removed from the original queue.

11.7 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** 
.

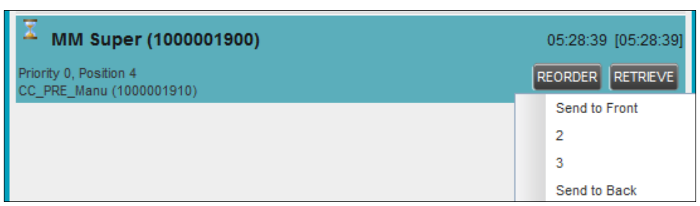


Figure 76 Reorder Queued Call

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 that you can choose from to reorder a call in the queue, in addition to the *Send to Back* and *Sent to Front* options.

11.8 Transfer Call to Top of Queue (Premium Call Center)

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.

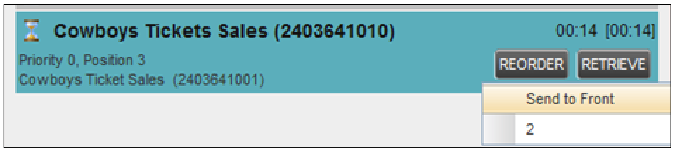


Figure 77 Transfer Call to Top of Queue

11.9 Promote Call in Queue (Premium Call Center)

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.

11.10 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.

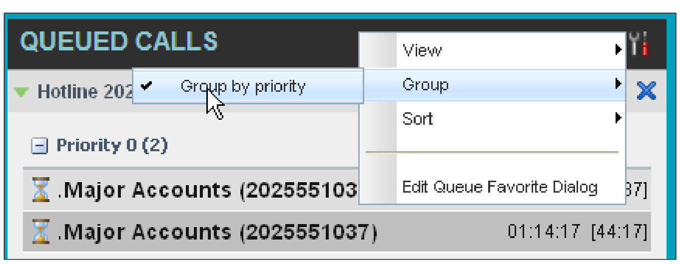


Figure 78 Queued Calls – Options – Group

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

11.11 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.

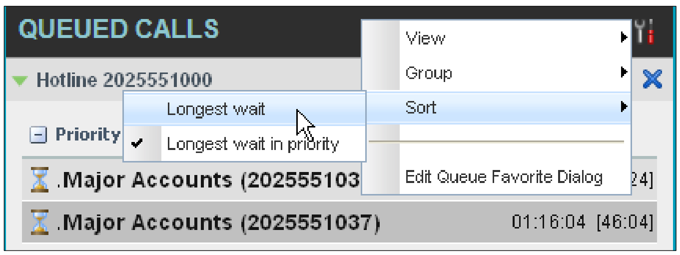


Figure 79 Queued Calls – Options – Sort

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

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 – 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.

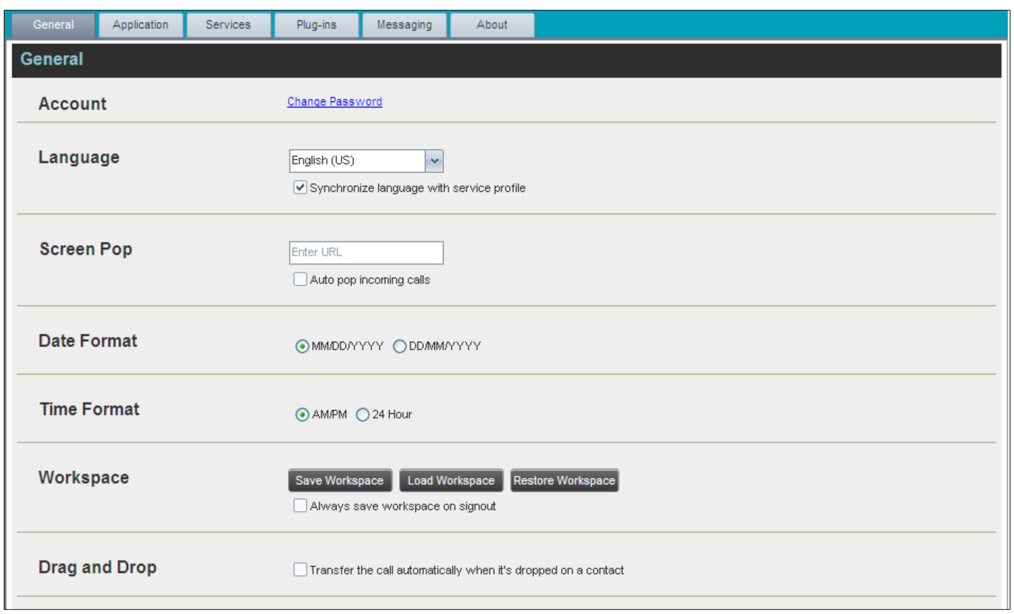


Figure 80 Settings – General

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

12.1.1 Account

You use this area to change your password.

To change your password:

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

Figure 81 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 edition of 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 BroadWorks profile and ignores the language selection on this page.

12.1.3 Date Format

This setting allows you to select the format to use for displaying the date in the calendar details for a contact and in the *Call History* dialog box. The possible options are:

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

12.1.4 Time Format

This setting allows you to select the format to use for displaying the time in the calendar details for a contact and in the *Call History* dialog box. The possible options are:

- AM/PM
- 24 hours

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* area to specify whether a call should be automatically transferred when dropped on a contact.

- *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.

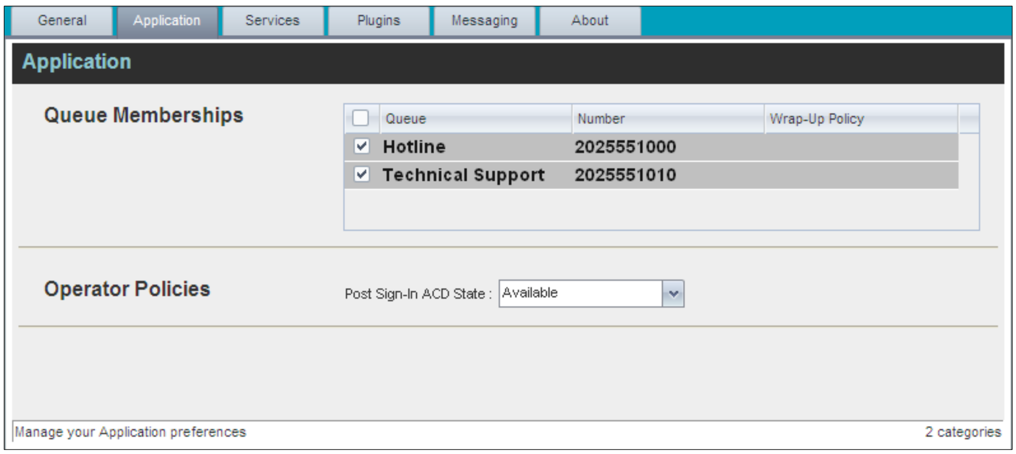


Figure 82 Settings – Application

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.

Post Sign-In ACD 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, which are applicable to Receptionist. These settings are only available if you have been assigned such services.

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

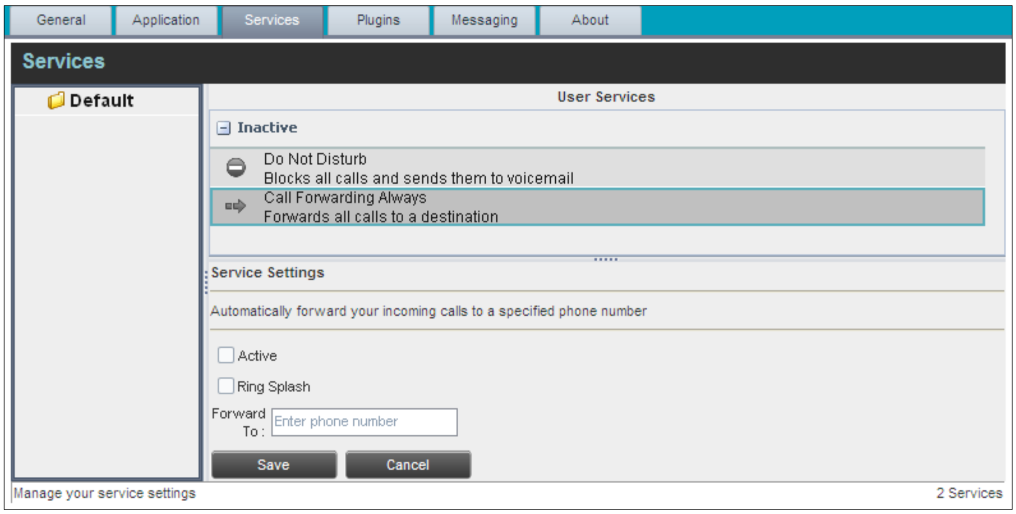


Figure 83 Settings – Services

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 which your calls are forwarded. 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 *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 which your calls are forwarded.
3) To generate a ring splash for incoming calls, check the *Ring Splash* option.
4) To save your changes, click **Save**.

12.4 Settings – Plug-ins

You use the Plug-ins tab to configure the plug-in software used by Receptionist to provide functionality such as call notification, program shortcuts, and call logs (which are called desktop integration features).

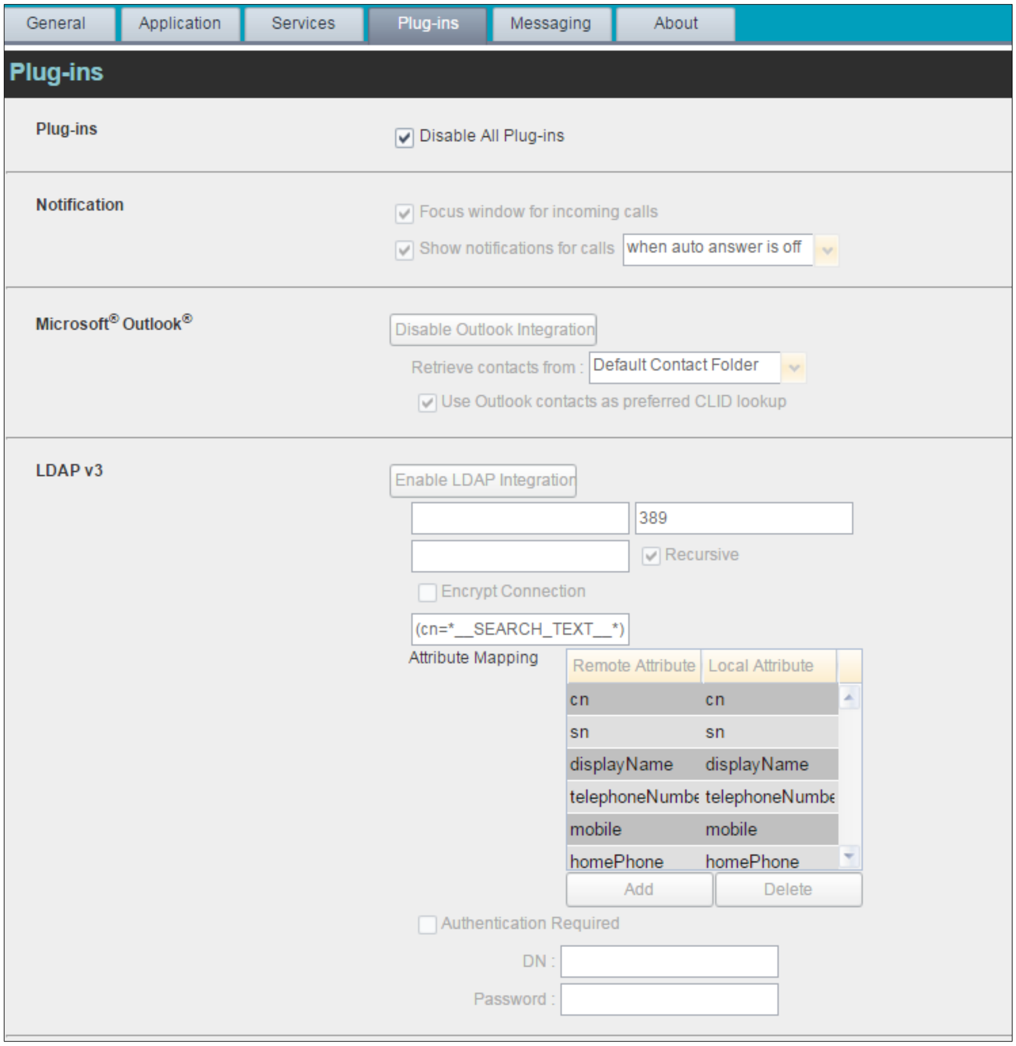


Figure 84 Settings – Plug-ins (Top of Page)

12.4.1 Plug-ins

You use the *Plug-ins* area to specify whether the desktop integration features of Receptionist should be enabled or disabled.

- *Disable All Plug-ins* – This setting allows you to enable or disable all desktop integration features. When this option is checked, the JNLP file required to run the desktop integration features will not be downloaded and the desktop integration features will not work.

12.4.2 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.

12.5 Settings – About

Use the *About* tab to view the information about Receptionist.

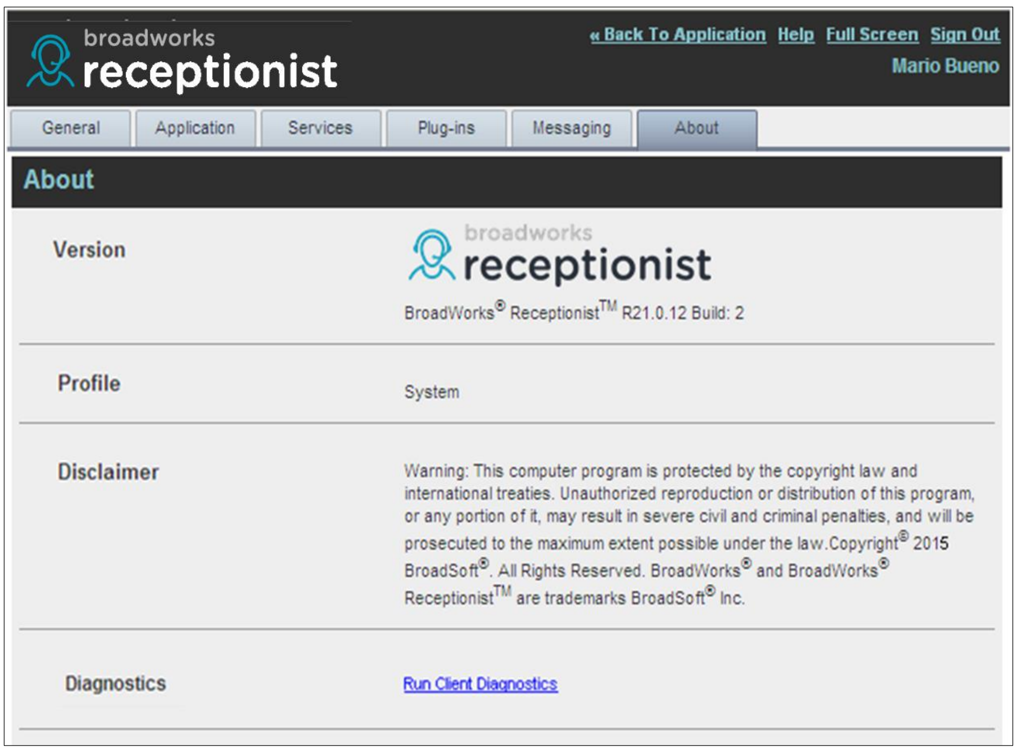


Figure 85 Settings – About Page

The following information is provided on this page:

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

- *Diagnostics* – This allows you to access the Diagnostic Tool, available in some versions of Receptionist. Appendix A: Glossary and Definitions

12.6 Monitored User States

The following table lists the possible states for monitored users.

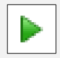
Icon	State in Receptionist	DND	CFA	Privacy	Call State
	Private	N/A	N/A	On	N/A
	On a Call	N/A	N/A	Off	Active call
	Ringing	N/A	N/A	Off	Ringing call, no active calls
	Away	N/A	N/A	Off	No active calls
	Away	N/A	N/A	Off	No active calls
	In a Meeting	N/A	N/A	Off	No active calls
	In a Meeting	N/A	N/A		No active 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

NOTE: When a user enables Privacy, this terminates your monitoring of the user's state for the current session. To be able to monitor their state again, you must sign out and then sign in after the user has disabled Privacy.

12.7 Call States

Call states are the available states for your current calls. The possible states are shown in the following table.

Call State	Display Name	Icon	Description
Ringing In (Local)	Incoming Local		This represents a Click-To-Dial call ringing on your phone.
Ringing In (Remote)	Incoming		The call is coming in and ringing on your phone.
Ringing In (Recalled Call)	Call Recalled		The call was parked or camped and is being recalled because its timer has expired.
Ringing Out	Outgoing		The call is outgoing, ringing out. This is equivalent to a phone ringing on the called party's phone.

Call State	Display Name	Icon	Description
Active	Active		The call is an active call.
On Hold	Held		The call is on hold.
On Hold (Remote Held)	Remote Held		The call is held by the remote party.
Active (In Conference)	Active		The call is in a conference and active.
Held (In Conference)	Held		The call is in a conference and on hold.

13 Appendix C: Keyboard Shortcuts

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

Key	Equivalent Mouse Action	Description
ESC	Click the **Close** 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 *Dialer* text box.	This places the cursor in the *Dialer* text box; it retains the currently selected item (if applicable). **NOTE**: In Internet Explorer 8, the "/" shortcut key does not always work. Pressing the key clears the default *Enter Number* text, but does not place the cursor in the input box.
?	Click the *Search* text box.	This places the cursor in the *Search* 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 *Call Console* or *Queued Calls* pane.
ARROW UP	Click the scroll bar or the previous item in a list.	This selects the previous item in the *Call Console* or *Queued Calls* pane.
PAGE DOWN	Scroll down one page.	This goes to the next page in the *Call Console* or *Queued Calls* pane.
PAGE UP	Scroll up one page.	This goes to the previous page in the *Call Console* or *Queued Calls* pane.
1….9	Select a call in the *Call Console*.	Pressing "1" selects the first call, pressing "2" selects the second call, and so on.
SPACEBAR	Click **Answer** on the selected incoming call in the *Call Console*.	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 **End** on a selected call in the *Call Console*.	This ends the selected call.
ENTER	Click **Dial**.	If the cursor in placed in the *Dialer* text box, the entered digits are dialed.
ENTER	Click **Search**.	If the cursor is placed in the *Search* text box, a search is performed.
+	Click **Transfer** in the *Dialer*.	This transfers the selected call to the ad hoc number entered in the *Dialer*.
SHIFT+1..9	Select a ringing call and click **Answer**.	Pressing **SHIFT+1** selects and answers the first ringing call, pressing **SHIFT+2** selects and answers the second ringing call, and so on.
SHIFT+1..9	Select an active call and click **Hold**.	Pressing **SHIFT+1** selects and then places the first active call on hold. Pressing **SHIFT+2** selects and then answers the second active call, and so on.
SHIFT+1..9	Select a held call and click **Retrieve**.	Pressing **SHIFT+1** selects and retrieves the first held call, pressing **SHIFT+2** selects and retrieves the second held call, and so on.

Key	Equivalent Mouse Action	Description
S or s	Click on **Settings** link.	This opens the *Settings* page if main window is in focus.
B or b	Click on **Back to Application** link.	This goes back to the main page from the *Settings* page.
R or r	Click the **Call History** button.	This opens the *Call History* dialog box.
H or h	Click the **Help** link.	This opens this guide in a PDF format.
SHIFT+L or SHIFT+l	Click the **Sign Out** link.	This signs the user out of the application.