

Call Center

Receptionist Guide



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1 Introduction to Receptionist

This guide provides step-by-step procedures and reference information for Call Center Hosted Thin Receptionist.

1.1 Introduction

The Call Center Receptionist is an 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. Call Center Receptionist realizes the promise of IP telephone by enhancing business processes and delivering rich services in a user-friendly way.

1.2 Audience

This course is intended for end users of Call Center Receptionist. The Receptionist edition is a full-featured client, designed to support the needs of front-office personnel in any environment.

1.3 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 Call Center Receptionist.
Getting Started	This section describes how to sign in and out of the 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.
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	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 calls states and phone states used in the Receptionist.
Appendix B: Keyboard Shortcuts	This appendix describes keyboard shortcuts available in Receptionist.

2 Getting started

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

Note 3: When using the Outlook Integration feature with Microsoft or Outlook 2013 (32 – or 64-bit edition), make sure Outlook is running before Receptionist is launched; otherwise, Outlook Integration functionality does not work.

2.1 Launch Receptionist from Web Portal

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

To access Receptionist from the web portal:

- 1) Log in to your BroadWorks web portal.
- 2) From the Launch drop-down list at the top right-hand side of the BroadWorks Logo pane, select the link for your Receptionist service.



Receptionist starts and you are automatically signed in.

2.2 Sign in from web browser

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

To access Receptionist from a web browser:

- 1) In your web browser, enter: <https://bvoip.hawaiiantel.com/callcenter> to access the Call Center client. The following screen will appear:



- 2) Enter your BroadWorks **User ID**: (10 Digit number)@voip.hawaiiantel.net and enter your Password. If you are unsure of your **User ID** or **Password**, contact your administrator.
- 3) Check **Stay signed in** to automatically reconnect and sign in to the server when it detects a network connection.
- 4) To configure your domain name or the Call Center language, click **Show options**. The area expands, displaying advanced options.

Receptionist Sign-in Page – Advanced Options

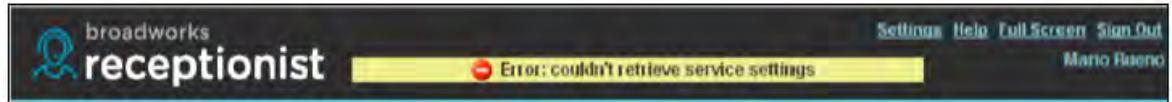
- 5) To configure your domain, in the **Append Domain** text box, enter your domain name. When you enter your user ID without a domain, the system appends the configured domain instead of the system-wide default domain.
- 6) To change the **Language**, from the Language drop-down list, select a new language.
- 7) To add a bookmark to this page in your browser, click **Bookmark this page** and follow the instructions of your browser.
- 8) Click **Sign In**, the Call Center starts and you are signed in.

Note: In some browser/operating system combinations, when you press **ENTER** instead of the **Sign In** button, a blank page may appear instead of the Call Center main interface.

2.3 Sign-in restrictions

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

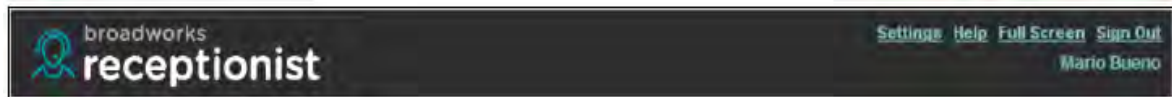
Sign-in Dialog Box with Error Message



Receptionist Main Interface (Top of Page) with Error Message

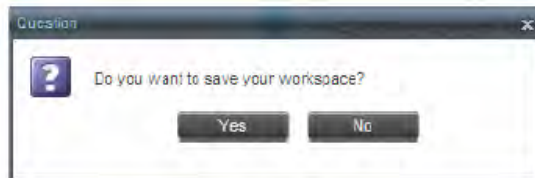
2.4 Get help

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



2.5 Sign out

- 1) To sign out of Call Center Receptionist, click **Sign Out** at the top right-hand side of the main interface.
- 2) A message appears asking you whether you would like to save your current workspace:



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

2.6 Set up your environment

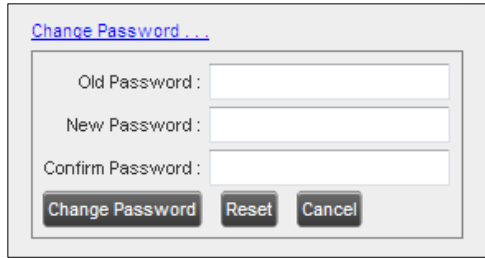
It is recommended that you configure Receptionist as follows when you first log in:

- Select call centers to manage – see section 8.1 Select Call Centers to Manage
- Join queues and set your post sign-in ACD state – see section 9.2 Settings – Application

2.7 Change your password

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

- 1) To change your Password, click the **Settings** link at the top right-hand side of the main page.
- 2) Click the **General** tab and then click **Change Password**.

A screenshot of a 'Change Password' dialog box. The dialog has a title bar with the text 'Change Password...'. Inside, there are three text input fields labeled 'Old Password:', 'New Password:', and 'Confirm Password:'. Below the input fields are three buttons: 'Change Password', 'Reset', and 'Cancel'.

- 3) Enter your old and new password in the provided text boxes and click **Change Password**.

The **Reset** button does not reset your password, it only clears the input boxes.

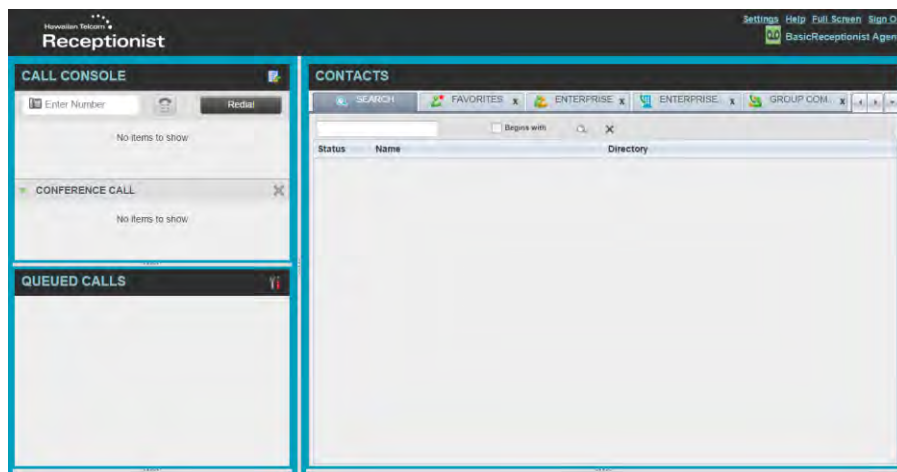
Note: *This password is shared with your web portal and other client applications that share BroadWorks Single Sign-On feature. It must meet the password requirements set on BroadWorks.*

3 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.

The Call Center Receptionist, allows you to administer certain changes such as call control options, large-scale line monitoring, queuing, multiple directory options, and views, Outlook integration, and other features required in large or distributed organizations.

The below screenshot shows the main interface of the Call Center – Receptionist:



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.
- **Queued Calls pane** – This is where you manage queued calls. You need to have the Call Center Supervisor service assigned to have access to this feature.
- **Contacts pane** – This pane contains your contact directories, which you use to make calls to contacts and monitor selected contacts.
- **Settings pages** – You use the *Settings pages*, accessed via the Settings link, to configure various aspects of Receptionist.
- **Call History dialog box** – You use the *Call History dialog box* to view and return your past calls.

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 9.1.5 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.

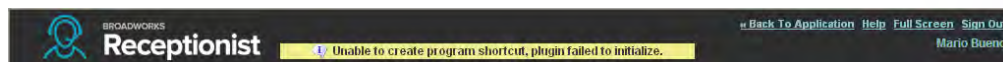
Most Receptionist controls are context-based, which means that they appear only when the action they represent can be taken. Context-based controls that allow you to take actions on the calls are called action buttons. For the list of controls available in Receptionist, see section 3.1 Controls. The action buttons are described in section 3.5.1 Call Action Buttons.

This section describes the following elements of the Receptionist main interface in detail with screen shots:

- **Logo Pane**
- **Call Console**
- **Contacts Pane**
- **Queued Calls Pane**
- **Controls**

3.1 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.



3.1.1 Global message area

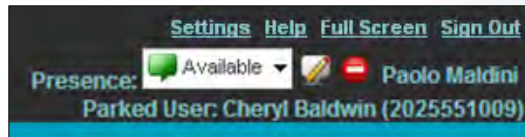
The *Global Message Area*, that is, the center area of the *Logo* pane, is used by Receptionist to display information, warning, and error messages to the user. A message appears for several seconds and then disappears.

3.1.2 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.

3.1.3 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.



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

- Presence - The possible states are *Available* (🟢), *Busy* (🔴), *Away* (🟡), or *Offline* (⚪).

3.2 Call Console

You use the **Call Console** to view and manage your current calls. For information on managing your calls, see section 4 Manage Calls.






The **Call Console** contains the following areas:

- Header
- Dialer
- Current Calls
- Conference Call Panel

3.2.1 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.

3.2.2 Dialer

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

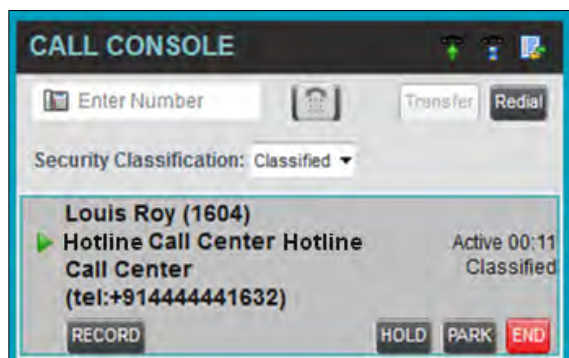
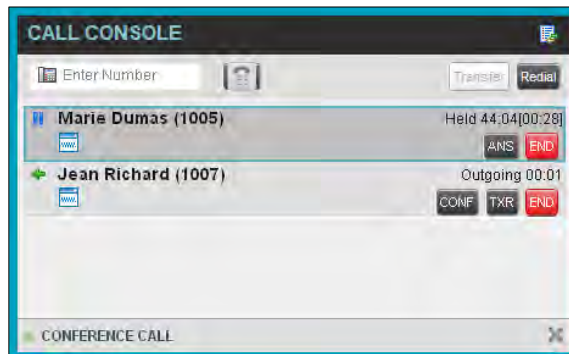


- The Enter Number text box is where you enter the number to dial.
- The buttons to the right, called action buttons, change depending on the context, and allow you to perform operations on calls. For more information, see sections 3.5.2 Call States and Actions and 3.5.1 Call Action Buttons.

3.2.3 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.



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.

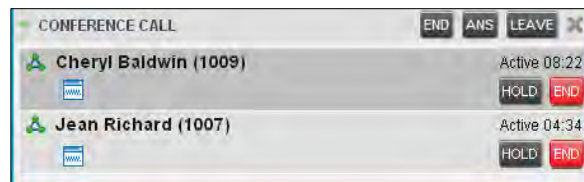
For a recalled call, the following information appears:

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.
- Call State icon – This is a visual representation of the current state of the call. For more information, see section 3.5.2 Call States and Actions.
- Call State name – This is the display name of the state the call is currently in.
- Call duration (Held duration) – This is the duration of the call from the time the call was received from BroadWorks 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.
- Call Classification (if applicable) – This is the security classification level of the call.
- Action buttons – These buttons are for the operations that you can currently take on the call. For more information, see sections 3.5.2 Call States and Actions and 3.5.1 Call Action Buttons.

3.2.4 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.




Conference Call Panel



Conference Call Panel – Security Classification

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








- Hold Conference button **HOLD** – This allows you to place the conference on hold.
- Resume Conference button **ANS** – This allows you to resume a held conference.
- Leave Conference button **LEAVE** – 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 3.2.3 Current Calls.

3.2.5 Call states and actions

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

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

3.3 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 4 Manage Calls. For information about organizing and managing your contact directories, see section 5 Manage Contacts.

Stat...	Last Name	First Name	Number	Exten...	Mobile	Department	Notes
	Baldwin	Cheryl	+12025551009	1009			Notes
	basicAA	Auto Attendant	+12025551036	1036			Notes
	Bueno	Mario	+12025551001	1001	2021112223		Notes
	Dumas	Marie	+12025551005	1005			Notes
	hotline	Call Center	+12025551000	1000			Notes
	Jones	Shirley	+12025551002	1002			Notes
	Meldini	Paolo	+12025551003	1003			Notes
	Smith	Stan	+12025551004	1004	2021234567		Notes
	standardAA	Auto Attendant					Notes
	Voice Portal	Voice Messagi...	+12025551021	1021			Notes
	Wyoming	Madeline	+12025551008	1008	2405557777		Notes

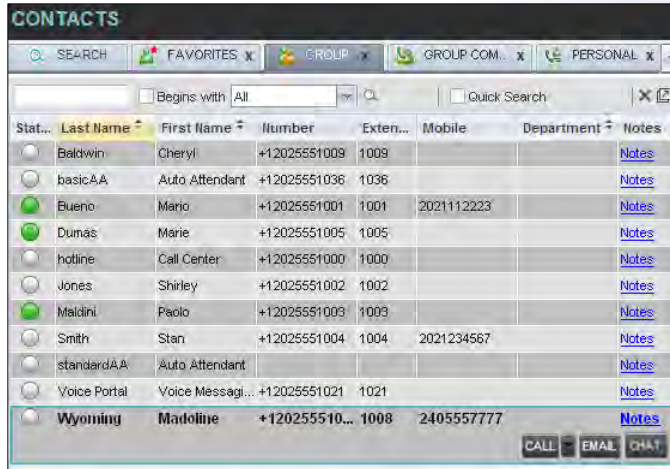
The Contacts pane contains the following areas:

- Directory Management Bar
- Directories List
- Search Tab
- Favorites Tab
- Group/ Enterprise Tab
- Group/ Enterprise Common Tab
- Monitored Contacts Tab
- Personal Tab
- Speed Dial Tab
- Queues Tab
- Custom Directories Tabs
- Outlook Tab
- Search Results Tabs

The tabs you see depend on your system configuration as well as the services assigned to you. For information, see section 1 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.



For the list of action buttons available in Receptionist, see section 3.5.1 Call Action Buttons.


3.3.1 Directory Management bar

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



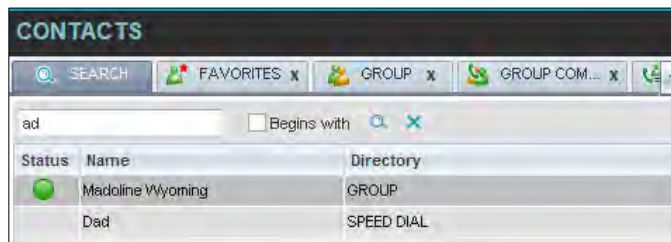
For information on managing contact directories, see section 5 Manage Contacts.

3.3.2 Directories list

The drop-down arrow  to the right of the directories tabs, when clicked, displays the list of directories available to you, and allows you to select directory tabs to display in the Contacts pane. For more information, see section 5.1 Show/Hide Directories.

3.3.3 Search tab

You use the Search tab to look for specific contacts in all your contacts directories. For information on performing directory searches, see section 5.3 Search Contacts.

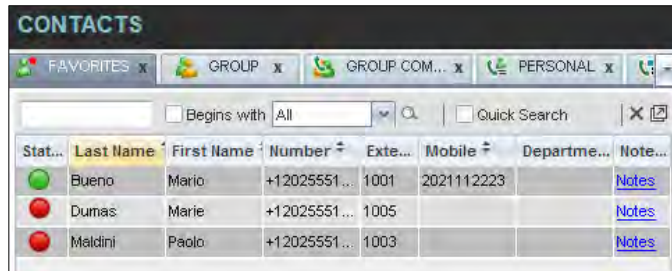


The search results can contain contacts from several directories, and the following information can be displayed for each contact (as applicable): phone state, contact name and the directory where the contact was found.

3.3.4 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 on the web portal. This is referred to as static monitoring. For more information, see section 6 Monitor Contacts.



The screenshot shows the 'CONTACTS' interface with the 'FAVORITES' tab selected. It features a search bar with 'Begins with' and 'All' dropdowns, and a 'Quick Search' checkbox. Below is a table with columns: Stat..., Last Name, First Name, Number, Exte..., Mobile, Departme..., and Note... The table contains three rows of contact information.

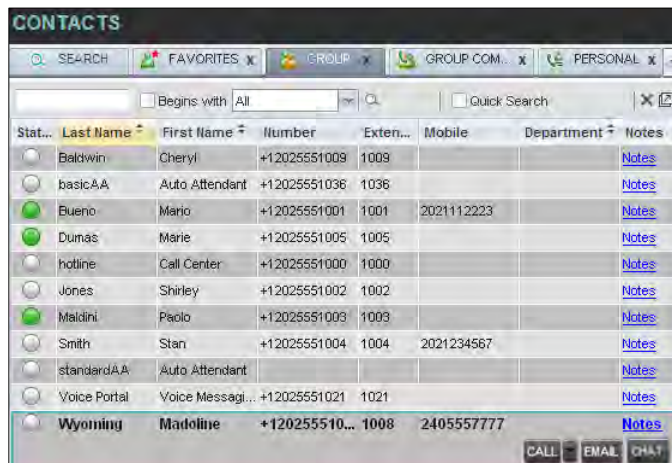
Stat...	Last Name	First Name	Number	Exte...	Mobile	Departme...	Note...
	Bueno	Mario	+12025551...	1001	2021112223		Notes
	Dumas	Marie	+12025551...	1005			Notes
	Maldini	Paolo	+12025551..	1003			Notes

3.3.5 Group/Enterprise tab

The Group/ Enterprise tab contains the contacts in your BroadWorks 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.

You can also monitor selected contacts without having to configure them on the web portal. This is referred to as dynamic monitoring. For information, see section 6.2 Dynamic Monitoring.



The screenshot shows the 'CONTACTS' interface with the 'GROUP' tab selected. It features a search bar with 'SEARCH' and 'Begins with' dropdowns, and a 'Quick Search' checkbox. Below is a table with columns: Stat..., Last Name, First Name, Number, Exten..., Mobile, Department, and Notes. The table contains ten rows of contact information.

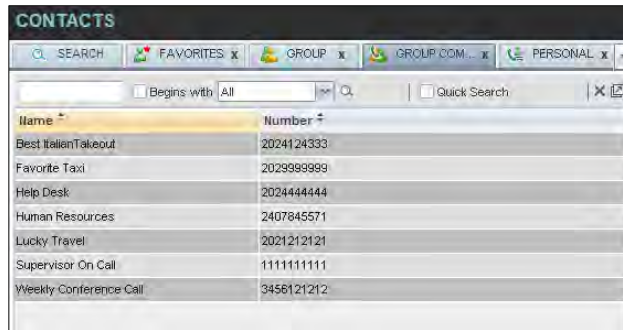
Stat...	Last Name	First Name	Number	Exten...	Mobile	Department	Notes
	Baldwin	Cheryl	+12025551009	1009			Notes
	basicAA	Auto Attendant	+12025551036	1036			Notes
	Bueno	Mario	+12025551001	1001	2021112223		Notes
	Dumas	Marie	+12025551005	1005			Notes
	hotline	Call Center	+12025551000	1000			Notes
	Jones	Shirley	+12025551002	1002			Notes
	Maldini	Paolo	+12025551003	1003			Notes
	Smith	Stan	+12025551004	1004	2021234567		Notes
	standardAA	Auto Attendant					Notes
	Voice Portal	Voice Messagi...	+12025551021	1021			Notes
	Wyoming	Madeline	+120255510...	1008	2405557777		Notes

Group Tab

3.3.6 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 on BroadWorks.

The contact's name and phone number (as configured on BroadWorks) are displayed for each contact.



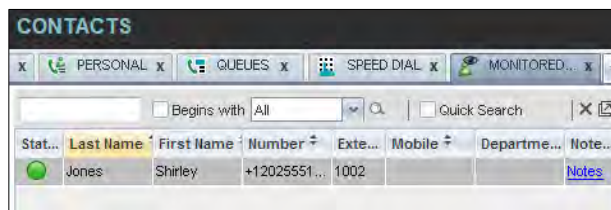
Name	Number
Best ItalianTakeout	2024124333
Favorite Taxi	2029999999
Help Desk	2024444444
Human Resources	2407845571
Lucky Travel	2021212121
Supervisor On Call	1111111111
Weekly Conference Call	3456121212

Group Common Tab

3.3.7 Monitored Contacts tab

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 is only visible if there are any dynamically monitored contacts. For more information, see section 6 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.

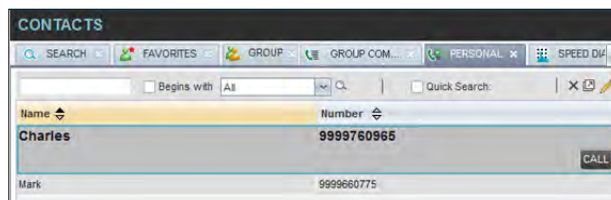


Stat...	Last Name	First Name	Number	Exte...	Mobile	Departme...	Note...
	Jones	Shirley	+12025551...	1002			Notes

3.3.8 Personal tab

The Personal tab contains the contacts from your personal phone list on the BroadWorks web portal.

You can edit your personal contacts in Receptionist. For information about managing your personal contacts, see section 5.6 Manage Personal Contacts.



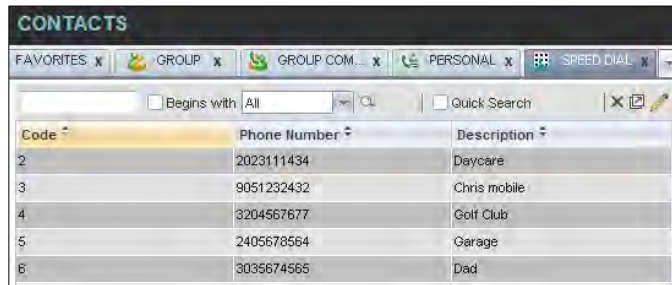
Name	Number
Charles	9999760965
Mark	9999660775

The information displayed for each contact includes the contact's name and number, as you configured them.

3.3.9 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 5.7 Manage Speed Dial Entries.

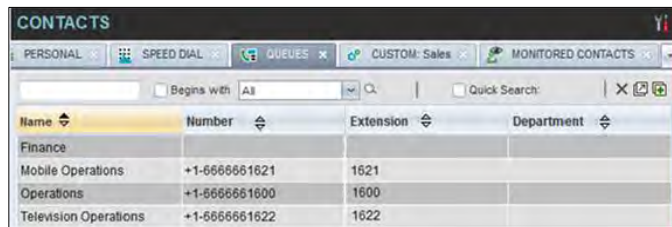


Code	Phone Number	Description
2	2023111434	Daycare
3	9051232432	Chris mobile
4	3204567677	Golf Club
5	2405678564	Garage
6	3035674565	Dad

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

3.3.10 Queues tab

The Queues tab displays the list of call centers and associated DNIS numbers that a call center agent or supervisor is staffing and/or supervising. The primary purpose of this directory is to provide you with a quick way to transfer calls to queues.



Name	Number	Extension	Department
Finance			
Mobile Operations	+1-6666661621	1621	
Operations	+1-6666661600	1600	
Television Operations	+1-6666661622	1622	

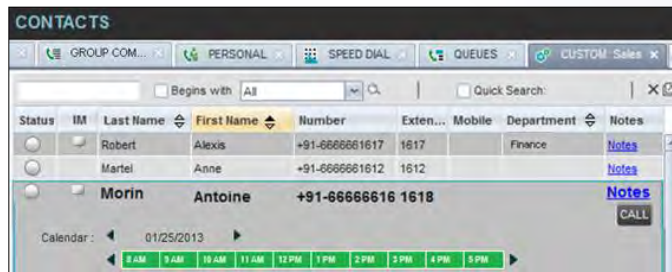
The information displayed for each queue includes the name, phone number, extension, and department (as applicable).

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

3.3.11 Custom Directories tabs

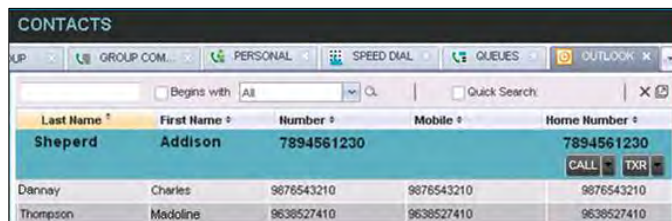
If your administrator has configured custom directories for your group, you can access them from Receptionist.

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



3.3.12 Outlook tab

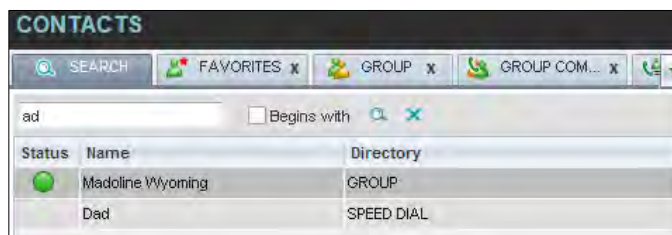
The Outlook tab contains your Outlook contacts. The information displayed for each contact includes the contact's last and first name, phone number, mobile number, and home phone number. This feature is available to you if you have the Outlook Integration feature enabled and configured. For more information, see section 9.4 Settings – Plug-ins.



3.3.13 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 .



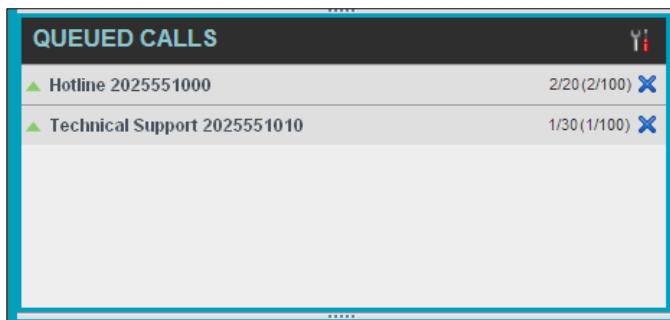
Note: A search results directory has the same properties as the original directory, and you can perform the same operations on contacts in a search results directory as in the original directory.

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.

3.4 Queued Calls pane


You use the Queued Calls pane to manage queued calls in the selected call centers. For more information about managing queued calls, see section 8 Manage Queued Calls.



The pane lists queued calls for the selected call centers. For information on selecting call centers to display, see section 8.1 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

A Message Waiting icon  indicates that there are outstanding messages for the call center.

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.



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 3.5.1 Call Action Buttons.

3.5 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 3.5.1 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.

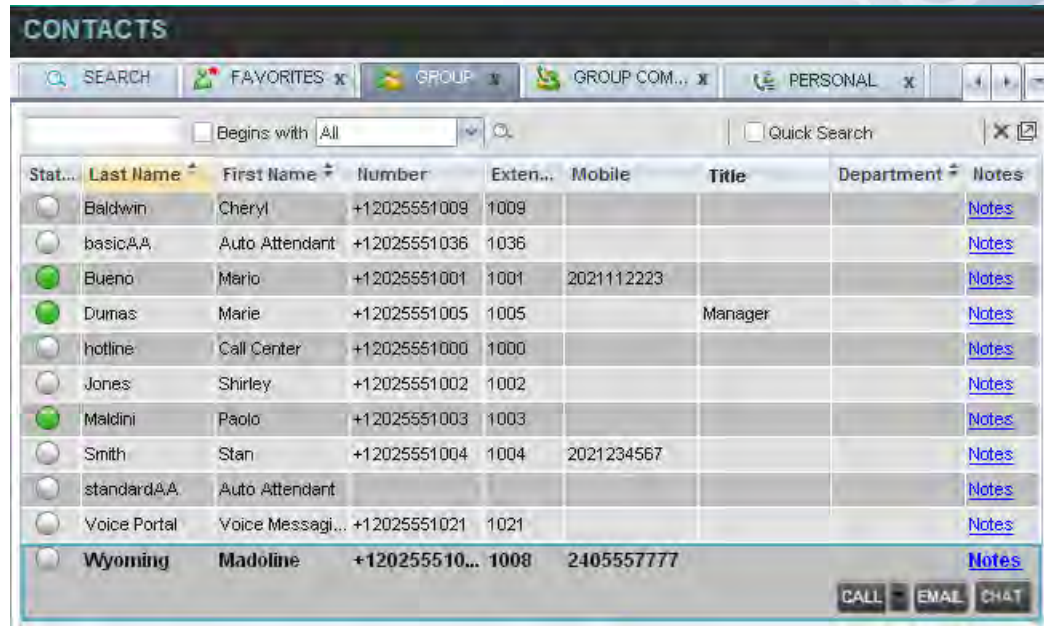
Name	Description
 Edit	This allows you to edit contacts in some directories.
Call Console Controls	
 Call History	This displays your call logs.
 Call Waiting	This allows you to turn Call Waiting on or off.
 Auto Answer	This automatically answers your incoming calls.
 End Conference	This ends a conference 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.
 Web Pop URL	This opens a page in your browser at the configured URL to provide additional information about the caller.
 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	
 Web Pop URL	This opens a page in your browser at the configured URL to provide additional information about the caller.
 vCard	This saves the caller's phone number and personal information as a vCard in Microsoft Outlook.
 Transfer to Voice Mail	This transfers an incoming call to your voice mail.

3.5.1 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.



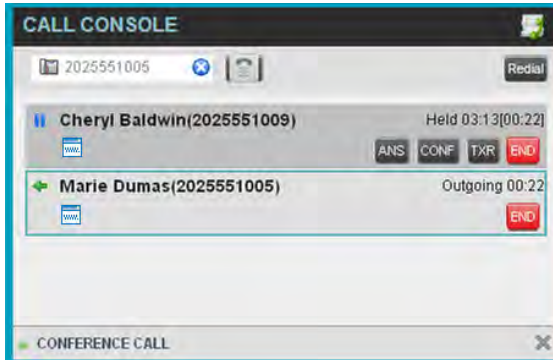
The following table lists action buttons available in Receptionist:

Button	Description
 Dial	This dials the number you entered in the <i>Dialer</i> .
 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.
 Mobile	This dials the contact's mobile number.
 E-mail	This brings up a new e-mail message window with the contact's e-mail address, allowing you to send an e-mail to the contact.
 Transfer	This transfers a call to an ad hoc number entered in the Dialer.
 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.

Button	Description
 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.
 Transfer to Voice Mail	This transfers a call to the selected contact's voice mail.
 Answer	This answers an incoming call, answers an unanswered call for a contact, or resumes a held call.
 Hold	This places a call on hold.
 End	This ends a call.
 Conference	This establishes a conference call or adds a call to a conference.
 Camp	This camps the call on a busy contact.
 Barge In	This barges in on a contact's call.
 Park	This parks a call on a contact.
 Record	This records a call.
 Pause	This pauses call recording.
 Resume	This resumes call recording.
 Stop	This stops recording a call.
 Monitor	This starts monitoring the state of the selected contact, except if the contact is a virtual user. Virtual users cannot be monitored.
 Promote	This promotes a selected call to the next higher priority bucket.
 Retrieve	This retrieves a selected call from the queue to the supervisor's device.
 Reorder	This changes a selected call's position in the queue.
 Web Pop URL	This opens a page in your browser at the configured URL to provide additional information about the caller.
 Delete Call Log	This deletes a call log from Call History.

4 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.

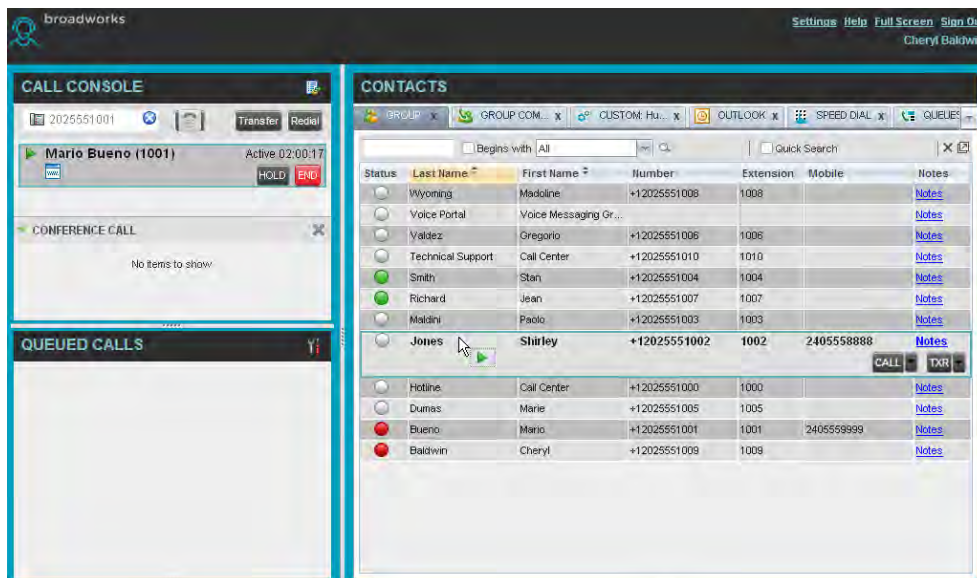


4.1 Drag and drop call onto contact

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 from the operation you want to perform on that call.

However, you can enable automatic call transfer on Drag and Drop (if available). If automatic transfers 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 9.1.7 Drag and Drop.




4.2 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.

4.2.1 View current calls

Your current calls are always visible in the Call Console.

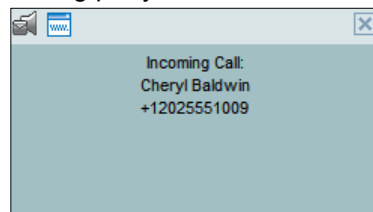
To view your conference call:

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

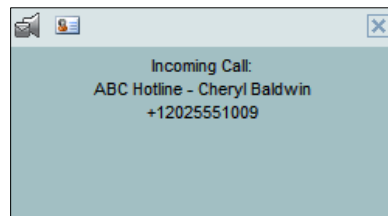
4.2.2 View incoming call details

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.

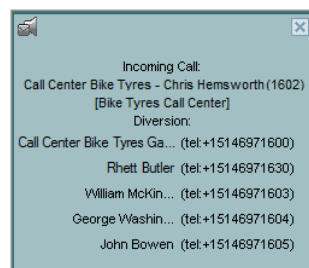
- Direct inbound calls – For calls to your direct number or extension, the following information is displayed:
 - Calling party name
 - Calling party number



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



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



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.

4.3 View and change Security Classification of calls

Receptionist displays the security classification level of your current calls and allows you to change your assigned security classification level if you have the Security Classification service assigned and your security classification level is not “Unclassified”, which is the lowest level.

The security classification level of a call is the lowest security classification level for all call participants. Users who do not have a security level assigned are considered to have the security level of “Unclassified”.



4.3.1 Change Security Classification

You can change your security classification, but only to a level lower than your assigned level, and you can only do so while in an active call. The security classification level of your calls is then recalculated.

The security classification of a call can also change when other participants change their security classification level or when participants join or leave the call. If a security classification level of a call changes the new level is displayed.

After all your calls end, your security classification level is reset to your assigned security classification level.



To change your current security classification:

From the Security Classification drop-down list, select a new security classification level.


4.4 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.

4.4.1 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 the 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.

4.4.2 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.
- 2) Move the mouse over the contact and click Answer . The call appears as Incoming in the Call Console.

4.5 Hold and resume calls

You can only put an active call on hold.


4.5.1 Put call on hold

To put a call on hold:

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

4.5.2 Resume held call

To resume a held call:

Move the mouse over the call and click Answer .

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

4.6 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.

4.6.1 Dial ad hoc number

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



To dial an ad hoc number:

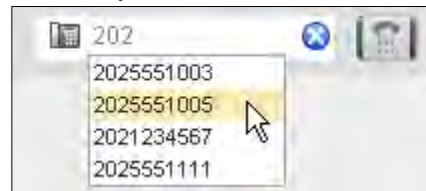
- 1) In the Dialer, enter the phone number and click Dial . The call appears in the Call Console as Incoming Local and your phone rings.
- 2) Click Answer  for that call. An outbound call is placed and the call state changes to Outgoing.


4.6.2 Redial number

Receptionist keeps up to ten most recently dialed numbers.

To redial one of the recently dialed numbers:

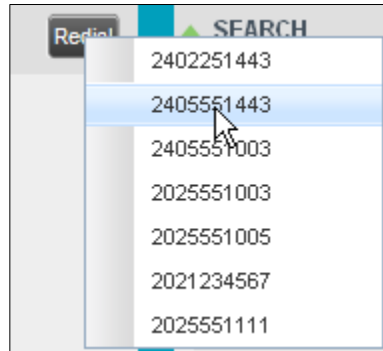
- 1) In the Dialer, place the cursor in the text box and start entering a number. A list of recently called numbers that start with the entered digits appear.



- 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.

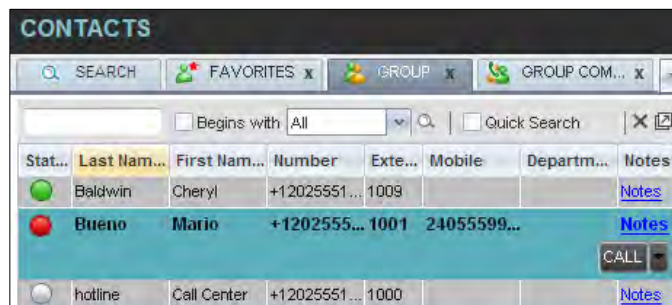



4.6.3 Dial contact

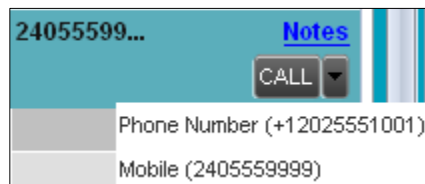
You can dial contacts from any directory available in Receptionist.

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.




- 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.



4.6.4 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** .


4.6.5 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.



- 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** .

4.7 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.

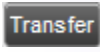
4.8 Transfer calls

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.


4.8.1 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 from the list.

4.8.2 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** .

4.8.3 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 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.

4.8.4 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** .

4.8.5 Transfer to queue

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.

4.9 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.

4.9.1 Conduct Busy Camp On

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 need to have the *Busy Camp On* service assigned and active.

To camp a call on a busy contact:


- 1) In the *Call Console*, select the call to camp.
- 2) In your *Group/Enterprise* or *Favorites* directory, click a *Busy* or *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*.

4.9.2 Conduct Group Call Park

Group Call Park searches within a predefined hung 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*.

4.10 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.



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.


4.10.1 Start three-way conference

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

To start a conference:

- 1) If necessary, place calls to participants using any of the methods described in section 4.6 Make and End Calls.
- 2) In the Call Console, select one of the two calls.




- 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.

4.10.2 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 4.6 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.


4.10.3 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.


4.10.4 Resume held conference

To resume a held conference:

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


4.10.5 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 .


4.10.6 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** .

4.10.7 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.

4.10.8 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** .

4.10.9 End conference

To end the conference:

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

4.10.10 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.

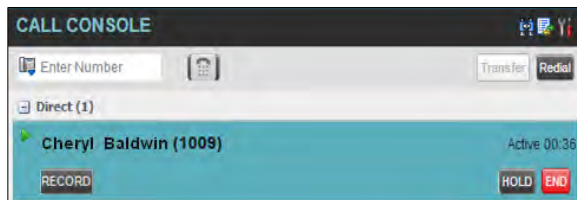
Alternatively, drag the call onto the target contact and click **Barge In**  for that contact.

You can now perform any conference operation on the call.

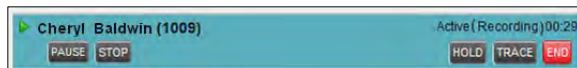
4.11 Record call (optional feature)

To record calls, you have to have the Call Recording service assigned and configured. You can record calls manually or have the system automatically record your calls. Depending on your Call Recording mode, Receptionist may allow you to manually start, pause, resume, or stop recording a call.

For information on configuring your services, see the BroadWorks Web Interface Administration Guide.



When a call is being recorded, the recording state, (which can be either Recording or Paused) appears on the line for the call.



4.11.1 Start call recording


To manually record calls, you have to have your Call Recording service mode set to the On Demand or On Demand with User Initiated Start.

To record a call, select the call in the Call Console and click Record .


In the On Demand mode, the call is recorded from the beginning, and you have to request the recording before the end of the call to keep the recording. In the On Demand with the User Initiated Start mode, the recording starts from the moment when you click the Record button.

4.11.2 Pause and resume call recording

To pause and resume a recording, you have to have your Call Recording service mode set to On Demand, On Demand with User Initiated Start, or Always with Pause/ Resume.

To pause a recording, select a call that is being recorded in the *Call Console* and click **Pause** .

The recording pauses until you resume it or the call ends.

To resume a paused recording, select a call whose recording has been paused in the *Call Console* and click **Resume** .

When you pause and resume a recording, only one call recording is generated for the call.

4.11.3 Stop call recording

You can only stop recording a call if your Call Recording service mode is set to the On Demand with User Initiated Start.

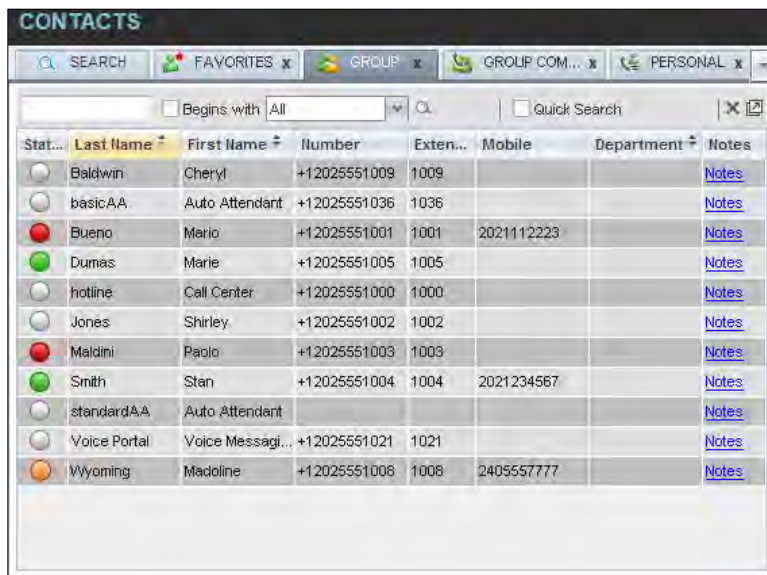
To stop recording a call, select the call that is being recorded (or whose recording has been paused) in the *Call Console* and click **Stop** .

If you click **Start** after a call recording has been stopped, a separate recording is created.

5 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.



Stat...	Last Name	First Name	Number	Exten..	Mobile	Department	Notes
<input type="radio"/>	Baldwin	Cheryl	+12025551009	1009			Notes
<input type="radio"/>	basicAA	Auto Attendant	+12025551036	1036			Notes
<input checked="" type="radio"/>	Bueno	Mario	+12025551001	1001	2021112223		Notes
<input checked="" type="radio"/>	Dumas	Marie	+12025551005	1005			Notes
<input type="radio"/>	hotline	Call Center	+12025551000	1000			Notes
<input type="radio"/>	Jones	Shirley	+12025551002	1002			Notes
<input checked="" type="radio"/>	Maldini	Paolo	+12025551003	1003			Notes
<input checked="" type="radio"/>	Smith	Stan	+12025551004	1004	2021234567		Notes
<input type="radio"/>	standardAA	Auto Attendant					Notes
<input type="radio"/>	Voice Portal	Voice Messagi...	+12025551021	1021			Notes
<input checked="" type="radio"/>	Wyoming	Madoline	+12025551008	1008	2405557777		Notes

For the list of contact directories available in your version of Receptionist, see section 1 Introduction to Receptionist.

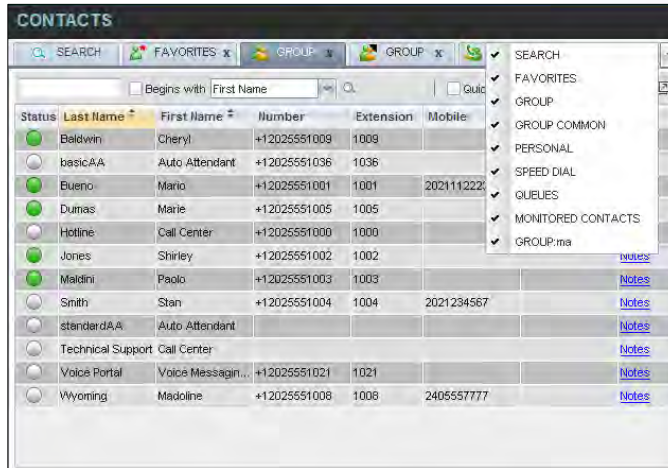
For information on monitoring contacts, see section 6 Monitor Contacts; for information on call-related functions, see section 4 Manage Calls.

This section describes the directories management functions provided by the Receptionist.


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


5.1 Show/hide directories

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



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 the 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.

5.2 View directory content

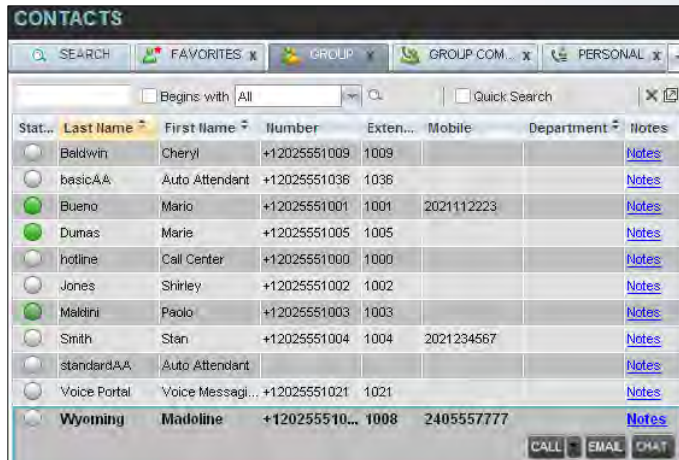
Your directories are displayed as tabs at the top of the Contacts pane, with the details of only one directory visible at a time. The information displayed about each contact depends on the directory you are viewing.

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. This expands the row for the contact displaying applicable action buttons and in some directories also the contact's Exchange calendar. For more information about the action buttons, see section 3.5.1 Call Action Buttons. For more information about the contact's calendar, see section 6.4 Monitored Contact's Calendar.



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.

5.3 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

5.3.1 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.



To perform a quick search:

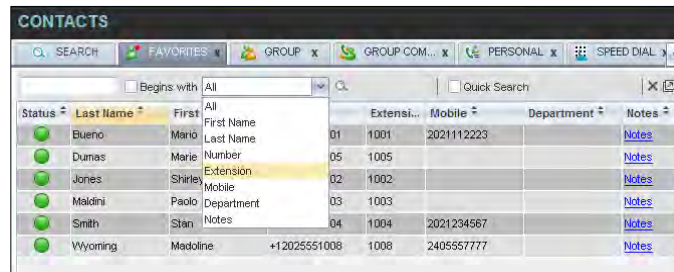
- 1) Click the directory tab where you want to perform the search.
- 2) Order the directory by the column on which you want to perform the search.
- 3) Check the Quick Search box.
- 4) From the keypad that appears, select a character (a single letter or digit) by which you want to search. The contacts 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.

5.3.2 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.



The screenshot shows the CONTACTS application interface. At the top, there are tabs for SEARCH, FAVORITES, GROUP, GROUP COM..., PERSONAL, and SPEED DIAL. Below the tabs, there is a search bar with a dropdown menu set to 'All' and a 'Quick Search' checkbox. The main area displays a table of contacts with columns for Status, Last Name, First Name, Extension, Mobile, Department, and Notes. The table contains the following data:


Status	Last Name	First Name	Extensi...	Mobile	Department	Notes
●	Bueno	Mario	01	1001	2021112223	Notes
●	Dumas	Marie	05	1005		Notes
●	Jones	Shirley	02	1002		Notes
●	Maldini	Paolo	03	1003		Notes
●	Smith	Stan	04	1004	2021234567	Notes
●	Wyoming	Madoline	+12025551008	1008	2405557777	Notes

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.

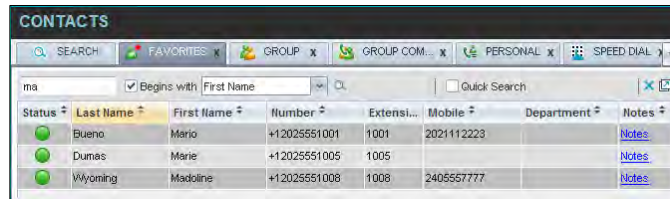
- 4) To restrict the search to contacts that start with the entered string, check the Begins with box. Otherwise, the search results also include contacts that contain the entered string.
- 5) From the drop-down list, select the column by which you want to search. You can select a specific column or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

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


Duplicate search results in other directories are displayed.



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.

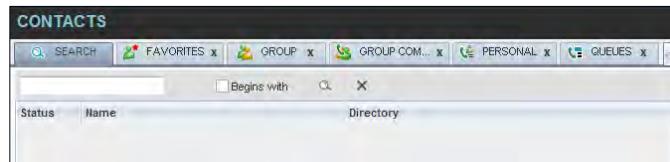
In the first case (Begins with not checked), entering “Ann” returns all contacts with the name “Ann”, but it also returns all contacts with names such “Anne”, “Marianne”, “Marie Ann”, “Ann Marie”, and so on.

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.



- 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.

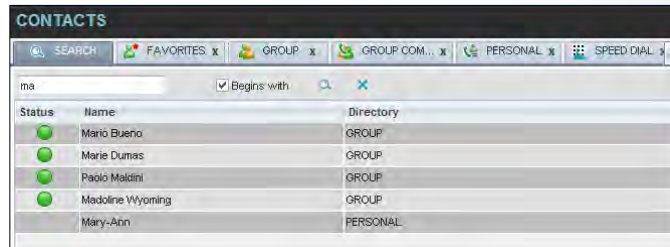
For example, if you do not remember whether Mary's last name is spelled “Shelley” or “Shelly”, you can enter “Shell”, and either name is returned.

- 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.

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



- 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.


5.3.3 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.

5.3.4 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.

5.4 Order directory entries

Receptionist allows you to order directory entries in 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.

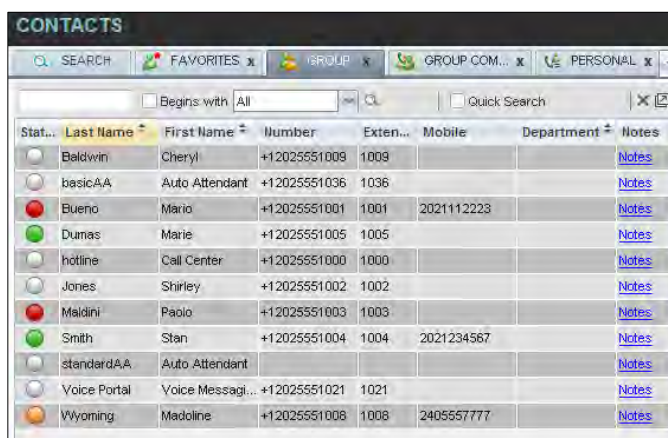
Directory	Sort Columns	Default Sort Column
Enterprise/Group	First Name, Last Name, Department	Last Name
Favorites	First Name, Last Name, Number, Mobile, Extension, Notes, Department, Status, IM	Last Name
Group/Enterprise Common	Name, Number	Name
Personal	Name, Number	Name
Speed Dial	Code, Description, Number	Code
Queues	Name, Number, Extension, Department	Name
Custom	First Name, Last Name, Department	Last Name
Outlook	Last Name, First Name, Number, Mobile, Home Phone	Last Name
Monitored Contacts	First Name, Last Name, Number, Mobile, Extension, Notes, Department, Status, IM	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 10.1 Monitored User States.

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.



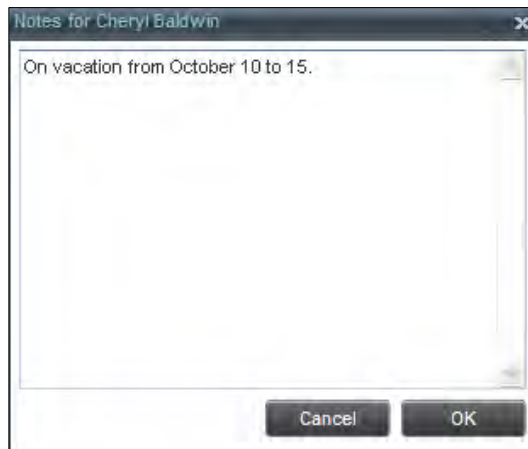
The contacts in the selected directory are reordered based on the selected column. The sort order is saved on sign-out and preserved between sessions.

5.5 Make notes about contact

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

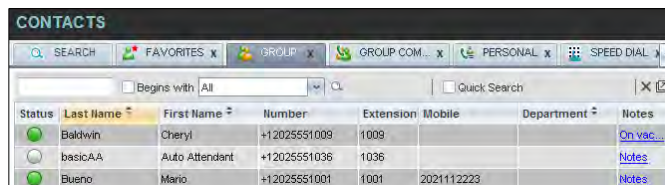
To make a note about a contact:

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



- 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**.

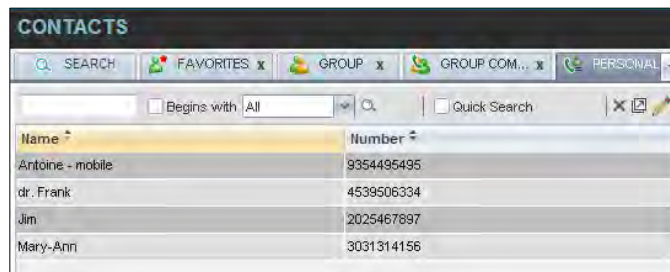
To close the dialog box without saving, click **Cancel**.



Status	Last Name	First Name	Number	Extension	Mobile	Department	Notes
	Baldwin	Cheryl	+12025551009	1009			On vac...
	basicAA	Auto Attendant	+12025551036	1036			Notes
	Bueno	Mario	+12025551001	1001	2021112223		Notes

5.6 Manage personal contacts

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



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

You can perform the following operations on personal contacts:


Add Personal Contact

Delete Personal Contact

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

5.6.1 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.



Name	Number
Antoine - mobile	9354495495
dr. Frank	4539506334
Jim	2025467897
Mary-Ann	3031314156
Grandpa	3031739411

- 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.

5.6.2 Delete personal contact

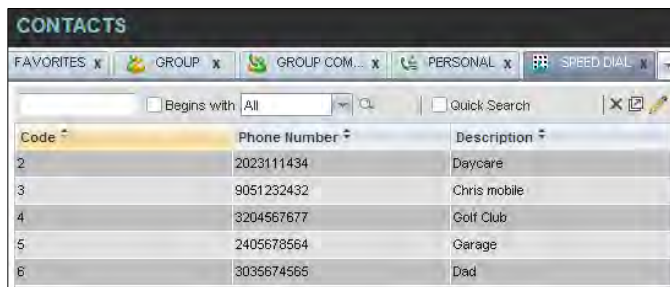
To delete a speed dial entry:

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



5.7 Manage speed dial entries

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




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

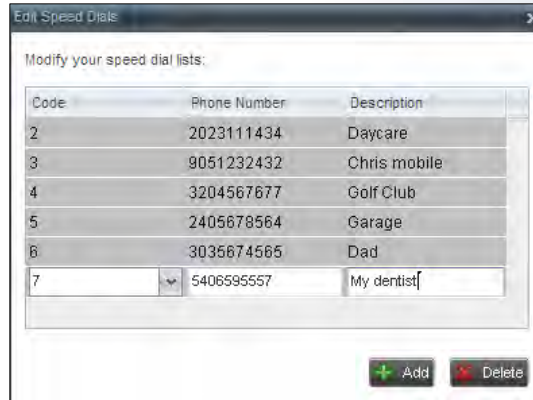
To update speed dial entries using the client, perform the following operations:

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

5.7.1 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.



- 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.

5.7.2 Modify speed dial entry

To modify a speed dial entry:


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



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

5.7.3 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**.



6 Monitor contacts

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

The following table summarized the monitoring capabilities 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.

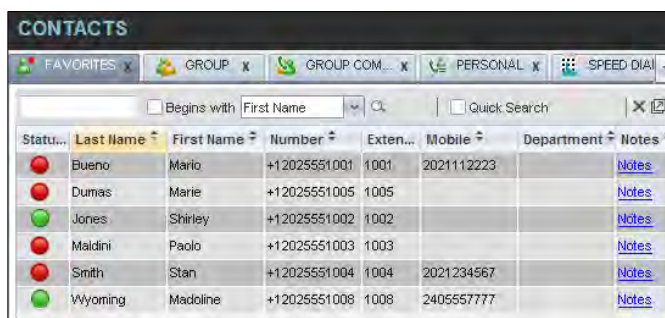
Note: If a call is parked against the contact that you are monitoring, the information about the parked call also appears.

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

- Static Monitoring
- Dynamic Monitoring
- Request Dynamic Monitoring
- Monitored Contact's Calendar
- Contact States

6.1 Static monitoring

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

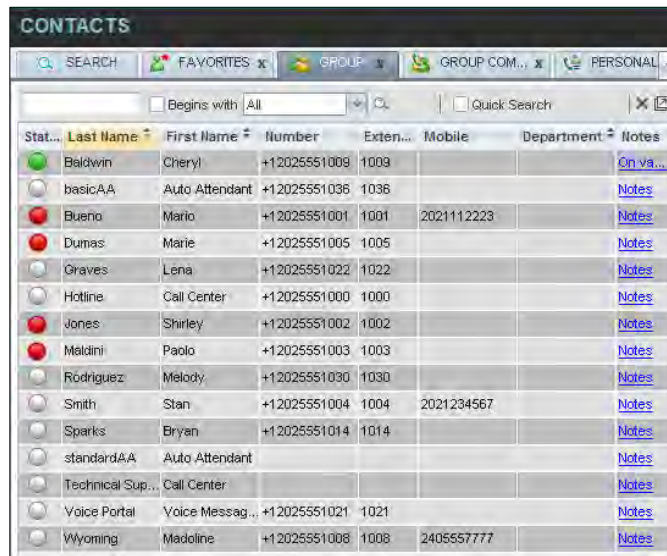


Statu...	Last Name	First Name	Number	Exten...	Mobile	Department	Notes
●	Bueno	Mario	+12025551001	1001	2021112223		Notes
●	Dumas	Marie	+12025551005	1005			Notes
●	Jones	Shirley	+12025551002	1002			Notes
●	Maldini	Paolo	+12025551003	1003			Notes
●	Smith	Stan	+12025551004	1004	2021234567		Notes
●	Wyoming	Madoline	+12025551008	1008	2405557777		Notes

6.2 Dynamic monitoring

Dynamic Monitoring allows you to view the call state of selected contacts in your Group/Enterprise, Search, Custom 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. Selected contacts cannot be unselected. When the number of monitored contacts reaches the maximum limit, the first contact that was elected for monitoring, is unselected, and is no longer monitored. The state of a contact that is not monitored is shown as Unknown.



Stat...	Last Name	First Name	Number	Exten...	Mobile	Department	Notes
●	Baldwin	Cheryl	+12025551009	1009			On va...
○	basicAA	Auto Attendant	+12025551036	1036			Notes
●	Bueno	Mario	+12025551001	1001	2021112223		Notes
●	Dumas	Marie	+12025551005	1005			Notes
○	Graves	Lena	+12025551022	1022			Notes
○	Hotline	Call Center	+12025551000	1000			Notes
●	Jones	Shirley	+12025551002	1002			Notes
●	Maldini	Paolo	+12025551003	1003			Notes
○	Rodríguez	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	Madeline	+12025551008	1008	2405557777		Notes

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.

6.3 Request dynamic monitoring

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

To monitor a contact:

In the Group/Enterprise, Search, or Custom 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, Custom, and Monitored Contacts directories.

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

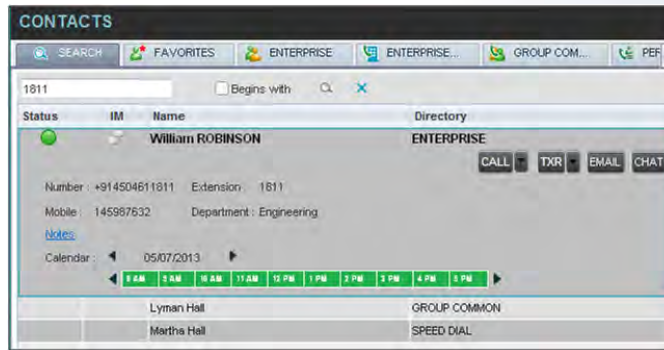
Stat...	Last Name	First Name	Number	Exten...	Mobile	Department	Notes
	Baldwin	Cheryl	+12025551009	1009			On va...
	basicAA	Auto Attendant	+12025551036	1036			Notes
	Bueno	Mario	+12025551001	1001	2021112223		Notes
	Dumas	Marie	+12025551005	1005			Notes
	Graves	Lena	+12025551022	1022			Notes
	Hotline	Call 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

This requests state notifications from BroadWorks for this contact's state is updated in real time.

Stat...	Last Name	First Name	Number	Exten...	Mobile	Department	Notes
	Baldwin	Cheryl	+12025551009	1009			On va...
	basicAA	Auto Attendant	+12025551036	1036			Notes
	Bueno	Mario	+12025551001	1001	2021112223		Notes
	Dumas	Marie	+12025551005	1005			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

6.4 Monitored contact's calendar

When you expand the entry for a monitored contact, the entry displays calendar details for the contact, with information downloaded from the Microsoft Exchange server, if the Calendar Presence Integration feature is enabled.



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.

6.5 Monitored contact's personal assistant state

When a monitored contact has the Personal Assistant service, the Personal Assistant presence state of the contact is integrated with the contact's line state and other services' state.

A user can set their Personal Assistant to one of the following states, and can optionally provide a date and time when they are planning to be back.

- None
- Business Trip
- Gone for the Day
- Lunch
- Meeting
- Out of the Office
- Temporarily Out
- Training
- Unavailable
- Vacation











For information on how the Personal Assistant presence of a contact is integrated with Receptionist, see section 6.6 Contact States.

6.6 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, the contact's Microsoft Exchange

calendar presence, 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	Exchange Calendar	Personal Assistant	Call State
	Private	N/A	N/A	On	N/A	N/A	N/A
	On a Call	N/A	N/A	Off	N/A	N/A	Active call
	Ringing	N/A	N/A	Off	N/A	N/A	Ringing call, no active calls
	Away	N/A	N/A	Off	Out of Office	N/A	No active calls
	Away	N/A	N/A	Off	Free or Tentative	Any state except None, Meeting, or Training,	No active calls
	In a Meeting	N/A	N/A	Off	Busy	N/A	No active calls
	In a Meeting	N/A	N/A		Free or Tentative	Meeting or Training	No active calls
	Call Forwarding Always	N/A	On	Off	Free or Tentative	N/A	No active calls
	Do Not Disturb	On	Off	Off	Free or Tentative	N/A	No active calls
	Available	Off	Off	Off	Free or Tentative	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

ToolTip Message	State in Receptionist	Additional Conditions
<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
<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	


7 Manage Call History

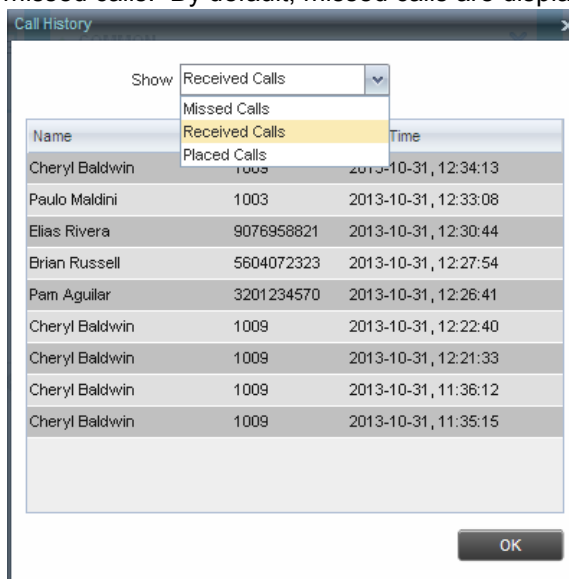
You can organize call logs and delete selected call logs or all call logs from Call History.

7.1 View Call History

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

To view your call history:

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


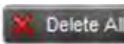



- 2) To show calls in a specific group, select that group from the Show drop-down list.

7.2 Delete Call History

You can delete a selected call log or all call logs from a Call History.

To delete call logs from Call History:

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

8 Manage queued calls

Receptionist allows you to manage calls in selected call centers (up to five) and monitor calls in real time. You manage queued calls using the Queued Calls pane. This functionality is only available if you are assigned to a call center (as supervisor or agent) and you have the BroadWorks Supervisor license assigned.




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

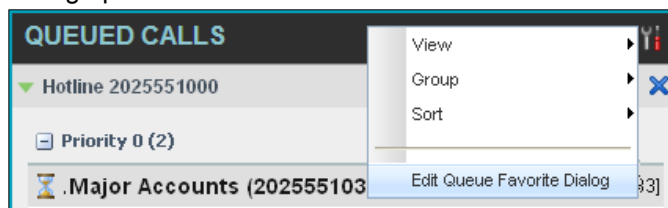
- Select Call Centers to Manage
- Modify Number of Calls to Display
- Retrieve Call from Queue
- Transfer Call to Ad Hoc Number
- Transfer Call Between Queues
- Transfer Call to Top of Queue (Premium Call Center)
- Promote Call in Queue (Premium Call Center)
- Group Calls
- Order Queued Calls

8.1 Select call centers to manage

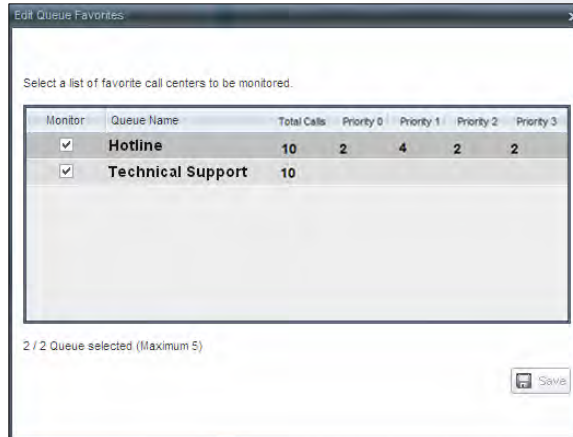
After you sign in to Receptionist, select the call centers you want to manage (up to five).

To select call centers:

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




The Edit Queue Favorites dialog box appears.



- 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.

8.2 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 buckets cannot exceed 50.

8.3 View queued calls

To view calls in a queue:

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

8.4 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.

8.5 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 .



The call is transferred and removed from the queue.


8.6 Transfer call between queues

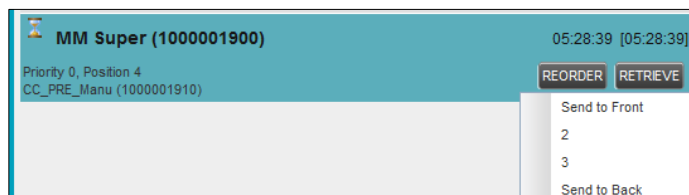
To transfer a call to another queue:

- 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.

8.7 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 .



- 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.

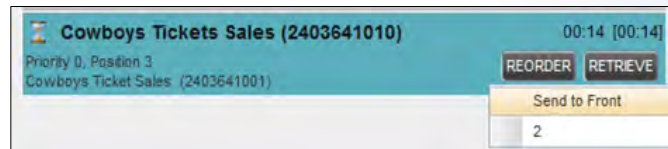
8.8 Transfer call to top of queue

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

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

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


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



8.9 Promote call in queue

In Premium call centers, a priority is attached to an incoming call based on then 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** .

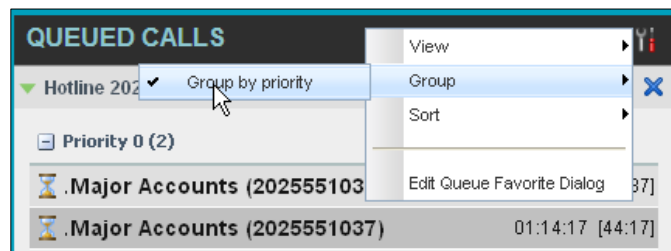
The queued call is promoted to the end of the next highest priority bucket.

8.10 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.




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

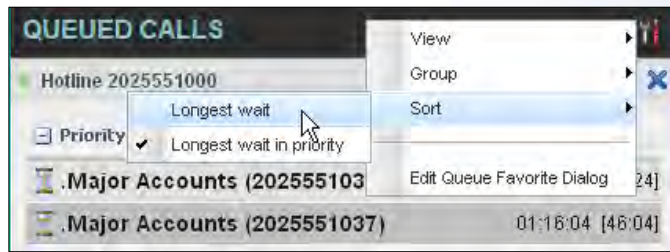
8.11 Change order of calls in queue

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.



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

9 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's browser's Back button to return to the main interface.

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

- Settings – General
- Settings – Application
- Settings – Services
- Settings – Plug-ins
- Settings – Messaging
- Settings – About

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

9.1 Settings – General

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

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

9.1.1 Account

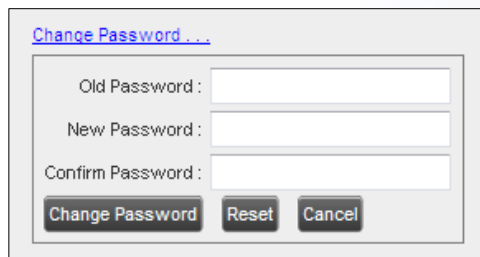
You use this area to change your BroadWorks password.

Receptionist shares login credentials with BroadWorks. So when you change your password here, remember to use this new password when accessing your web portal.

Note: The password you enter must meet password requirements set on BroadWorks.

To change your password:

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



The screenshot shows a dialog box titled "Change Password...". It contains three text input fields labeled "Old Password:", "New Password:", and "Confirm Password:". Below the input fields are three buttons: "Change Password", "Reset", and "Cancel".

- 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.

9.1.2 Language

The language settings allow you to select the language of the Call Center user interface.

- The drop-down list lists the languages available in your edition of Call Center. To change the language, select a new language from the list.
- *Synchronize language to my profile* – This box, when checked, synchronizes the Call Center language with your BroadWorks profile and ignores the language selection on this page.

9.1.3 Date format

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

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

9.1.4 Time format

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

AM/PM
24 hours

9.1.5 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: The 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 sign-out – 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 sign-out 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.

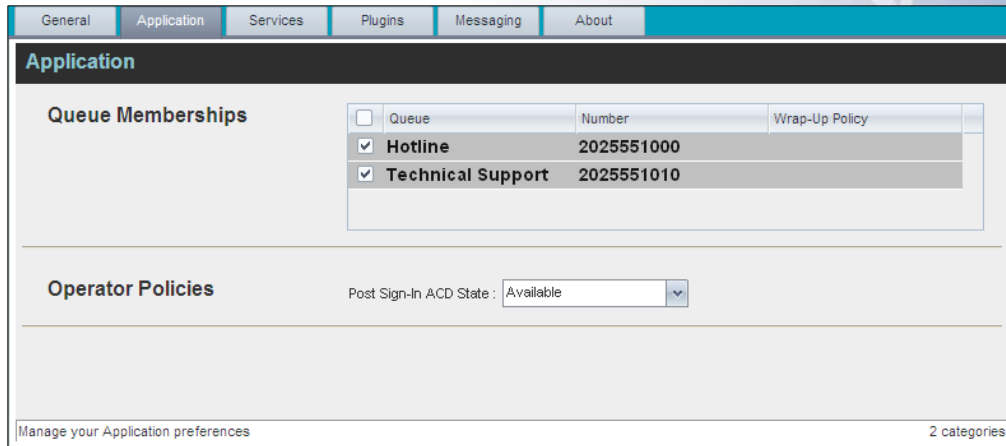
9.1.6 Drag and drop

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.

9.2 Settings – Application

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



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

9.2.1 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.

9.2.2 Operator policies

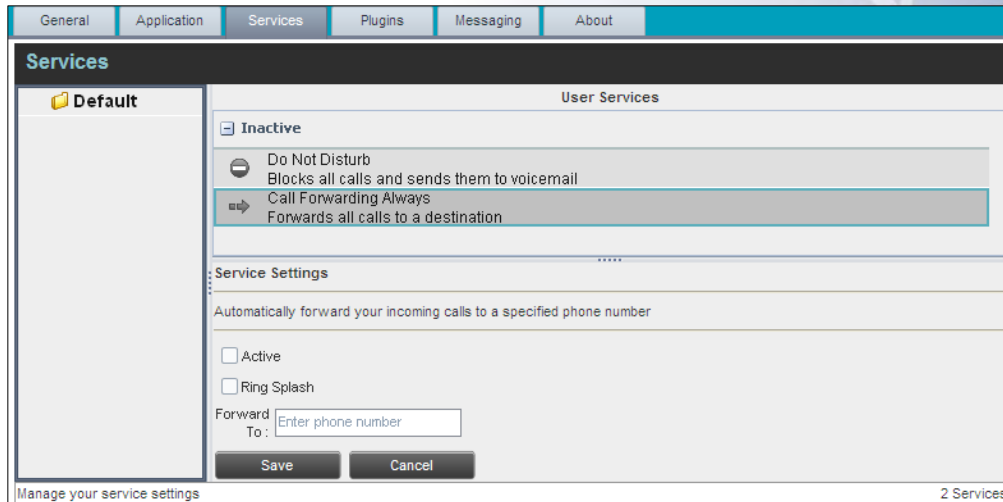
The Operator Policies setting allows you to select your post sign-in state in your queues.

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.

9.3 Settings - Services

You use the Services tab to configure various services assigned to you by your administrator on BroadWorks, which are applicable to Receptionist. These settings are only available if you have been assigned such services. For more information, see your administrator.

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



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

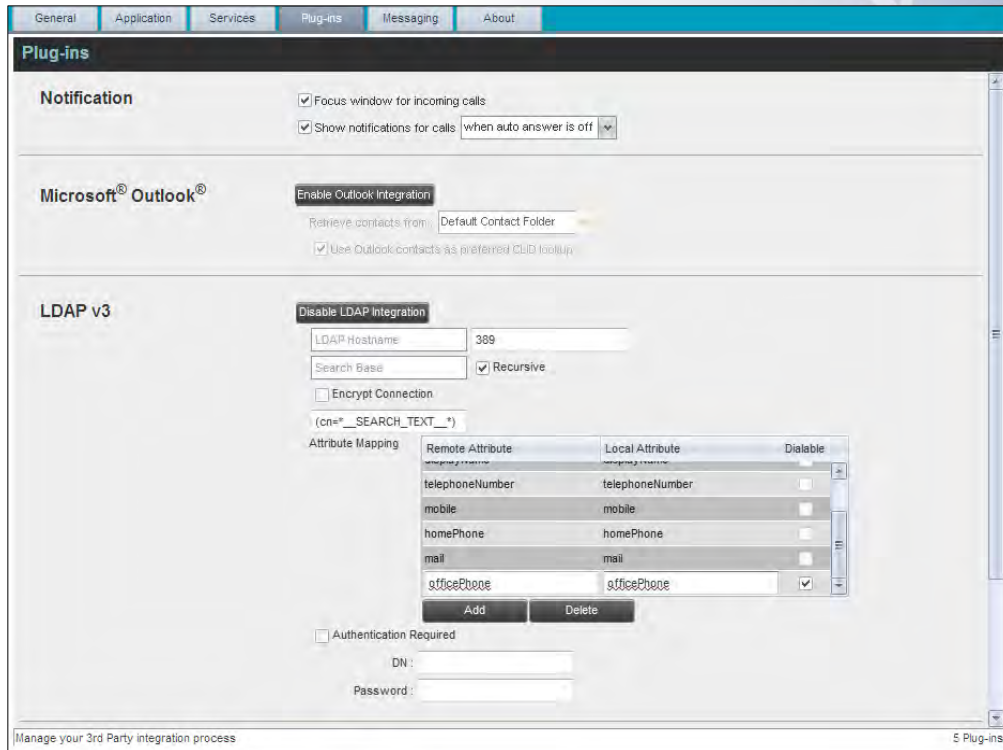
- Do Not Disturb – When you activate this service, you are not available to take calls, and all your calls are automatically sent to your voice mail.
- Call Forwarding Always – When you activate this service, you need to provide the phone number to which your calls are forwarded. When the service is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

To activate a service:

- 1) Select eh 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**.

9.4 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, and Outlook directories, program shortcuts and call logs.



9.4.1 Notification

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

- *Focus window for incoming calls* – When this option is checked and the browser window running Receptionist is minimized, Receptionist automatically restores the window on incoming calls.
- *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 in Firefox. In Internet Explorer, there must be only one tab open in the web browser running Receptionist.

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.

9.4.2 Microsoft Outlook

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

The options you can set are as follows:

- *Enable/Disable Outlook Integration* – This determines whether Receptionist integrates with Outlook to provide you with access to your Outlook contacts. If Outlook integration is disabled, the corresponding desktop plug-in software components are not downloaded from BroadWorks.
- *Retrieve contacts from* – This option allows you to specify where to look for your Outlook contacts.
- *Use Outlook contacts as preferred CLID lookup* – When this option is checked, Receptionist uses Outlook to try to identify a caller, when the caller ID is unknown.

Note: The Outlook integration feature provides the following functionality: CLID look up and accessing and searching Outlook contacts. When using Microsoft Outlook 2010 or 2013 (32- or 64-bit edition). Outlook has to be running before Receptionist is launched for these functions to work.

9.4.3 Program shortcuts

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

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

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

9.4.4 Activity archive

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

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

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

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

where:

- *Drive* is the drive letter where your profile is stored (typically C)
- *Windows_Username* is your Windows user name
- *BW_User_ID* is your BroadWorks user ID

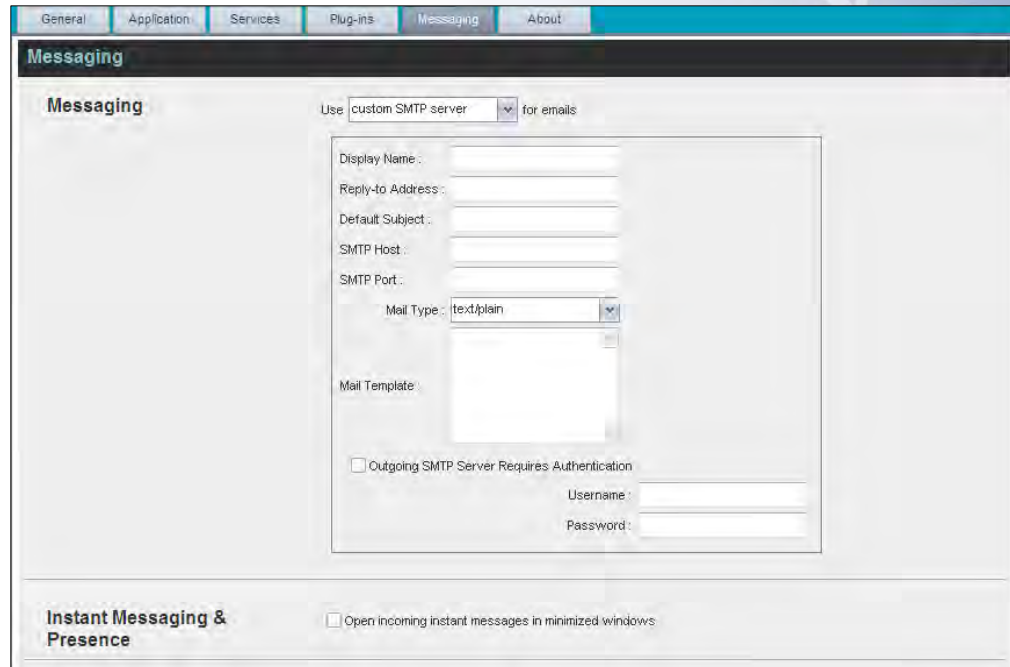
The following events are captured based on activity that occurs on the Receptionist client:

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

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

9.5 Settings – Messaging

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



9.5.1 Messaging

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

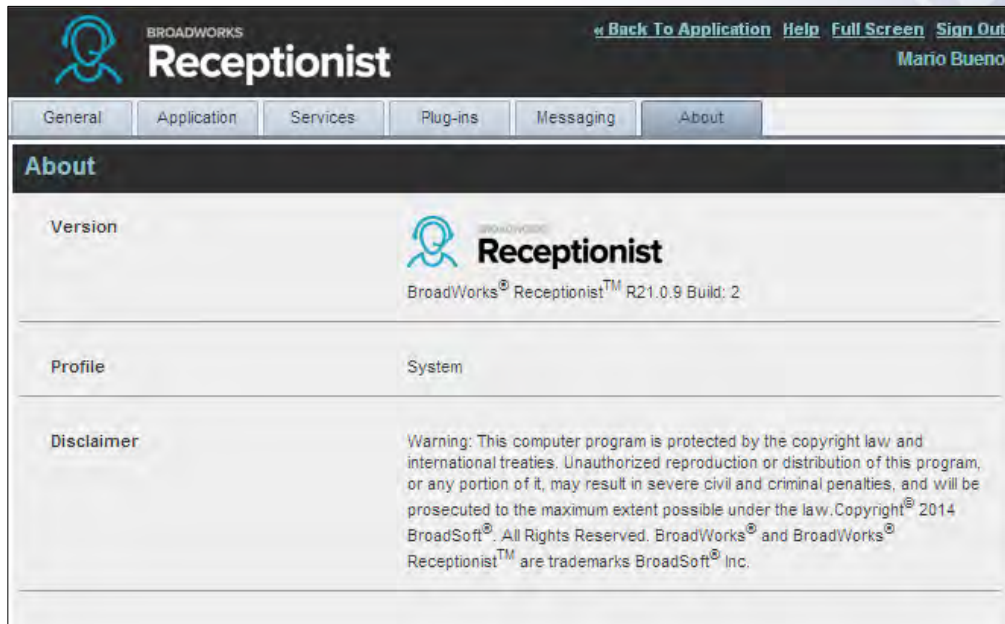
From the drop-down list, select the mail client to use for e-mails.

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

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

9.6 Settings - About

Use the About tab to view the information about Receptionist.













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.

10 Appendix A: Glossary and definitions

10.1 Monitored user states



The following table lists the possible states for monitored users.








Icon	State in Receptionist	DND	CFA	Privacy	Exchange Calendar	Personal Assistant	Call State
	Private	N/A	N/A	On	N/A	N/A	N/A
	On a Call	N/A	N/A	Off	N/A	N/A	Active call
	Ringing	N/A	N/A	Off	N/A	N/A	Ringing call, no active calls
	Away	N/A	N/A	Off	Out of Office	N/A	No active calls
	Away	N/A	N/A	Off	Free or Tentative	Any state except None, Meeting, or Training,	No active calls
	In a Meeting	N/A	N/A	Off	Busy	N/A	No active calls
	In a Meeting	N/A	N/A		Free or Tentative	Meeting or Training	No active calls
	Call Forwarding Always	N/A	On	Off	Free or Tentative	N/A	No active calls
	Do Not Disturb	On	Off	Off	Free or Tentative	N/A	No active calls
	Available	Off	Off	Off	Free or Tentative	None	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.

10.2 Call states


Call states are the available states for your current calls. They are as follows:

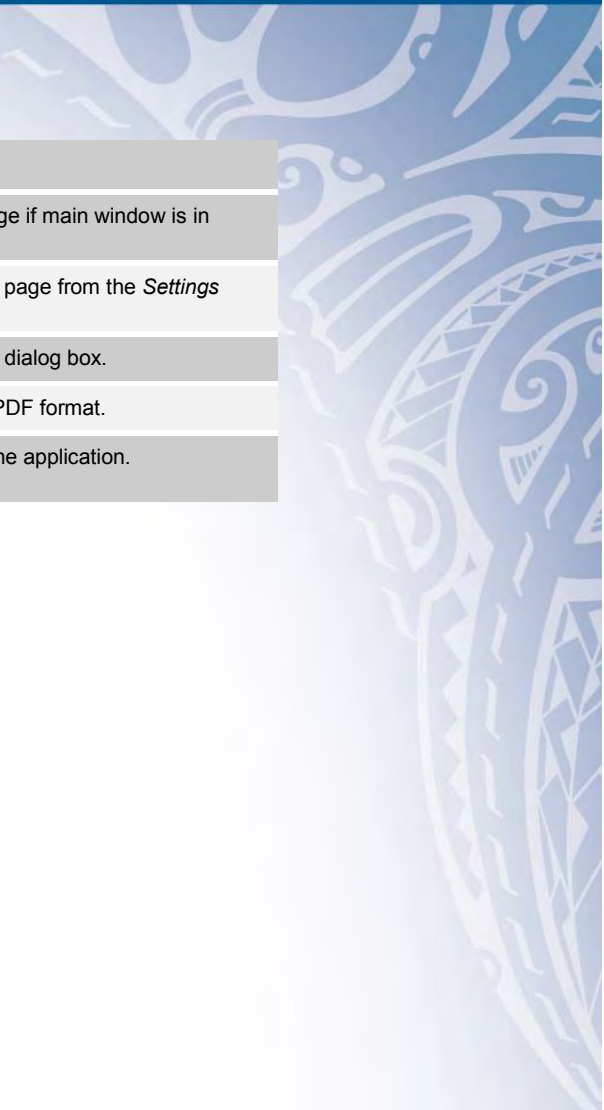
Call State	Display Name	Icon	Description
<i>Ringing In (Local)</i>	Incoming Local		This represents a Click-To-Dial call ringing on your phone.
<i>Ringing In (Remote)</i>	Incoming		The call is coming in and ringing on your phone.

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

11 Appendix B: Keyboard shortcuts

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

Key	Equivalent Mouse Action	Description
ESC	Click the 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 <i>Dialer</i> text box.	This places the cursor in the <i>Dialer</i> 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 <i>Enter Number</i> text, but does not place the cursor in the input box.
?	Click the <i>Search</i> text box.	This places the cursor in the <i>Search</i> text box; it retains the currently selected item (if applicable).
ARROW DOWN	Click the scroll bar or the next item in a list.	This selects the next item in the <i>Call Console</i> or <i>Queued Calls</i> pane.
ARROW UP	Click the scroll bar or the previous item in a list.	This selects the previous item in the <i>Call Console</i> or <i>Queued Calls</i> pane.
PAGE DOWN	Scroll down one page.	This goes to the next page in the <i>Call Console</i> or <i>Queued Calls</i> pane.
PAGE UP	Scroll up one page.	This goes to the previous page in the <i>Call Console</i> or <i>Queued Calls</i> pane.
1...9	Select a call in the <i>Call Console</i> .	Pressing “1” selects the first call, pressing “2” selects the second call, and so on.
SPACEBAR	Click Answer on the selected incoming call in the <i>Call Console</i> .	This answers the selected incoming call or if no call is selected, the incoming call that has been waiting the longest. Pressing the SPACEBAR again answers the next longest waiting incoming call, which puts the previously answered call on hold.
<PERIOD>	Click End on a selected call in the <i>Call Console</i> .	This ends the selected call.
ENTER	Click Dial .	If the cursor is placed in the <i>Dialer</i> text box, the entered digits are dialed.
ENTER	Click Search .	If the cursor is placed in the <i>Search</i> text box, a search is performed.
+	Click Transfer in the <i>Dialer</i> .	This transfers the selected call to the ad hoc number entered in the <i>Dialer</i> .
SHIFT+1..9	Select a ringing call and click 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 <i>Settings</i> 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 <i>Settings</i> page.
R or r	Click the Call History button.	This opens the <i>Call History</i> dialog box.
H or h	Click the Help link.	This opens this guide in a PDF format.
SHIFT+L or SHIFT+I	Click the Sign Out link.	This signs the user out of the application.