Receptionist

User Guide

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Receptionist Guide

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1 Introduction

1.1 About This Guide

This guide provides step-by-step procedures and reference information for Receptionist Release 14.sp4.

1.2 Overview

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

BroadWorks Receptionist delivers the following real benefits to users:

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

Along with this focus on design, BroadWorks Receptionist employs the latest technology platforms and communications facilities.

1.3 Audience

This document is intended for end users of Receptionist.

1.4 First Time Login

When starting Receptionist for the first time, several items must be correctly configured or checked.

To start Receptionist on subsequent occasions, follow the procedure in section *1.6 Subsequent Use*.

To start Receptionist:

1) Navigate to the program group **BroadSoft**, followed by **BroadWorks Receptionist**.

2) Click the **BroadWorks Receptionist** shortcut.

Figure 1 Start Menu.

Receptionist starts and you are presented with the following login interface:

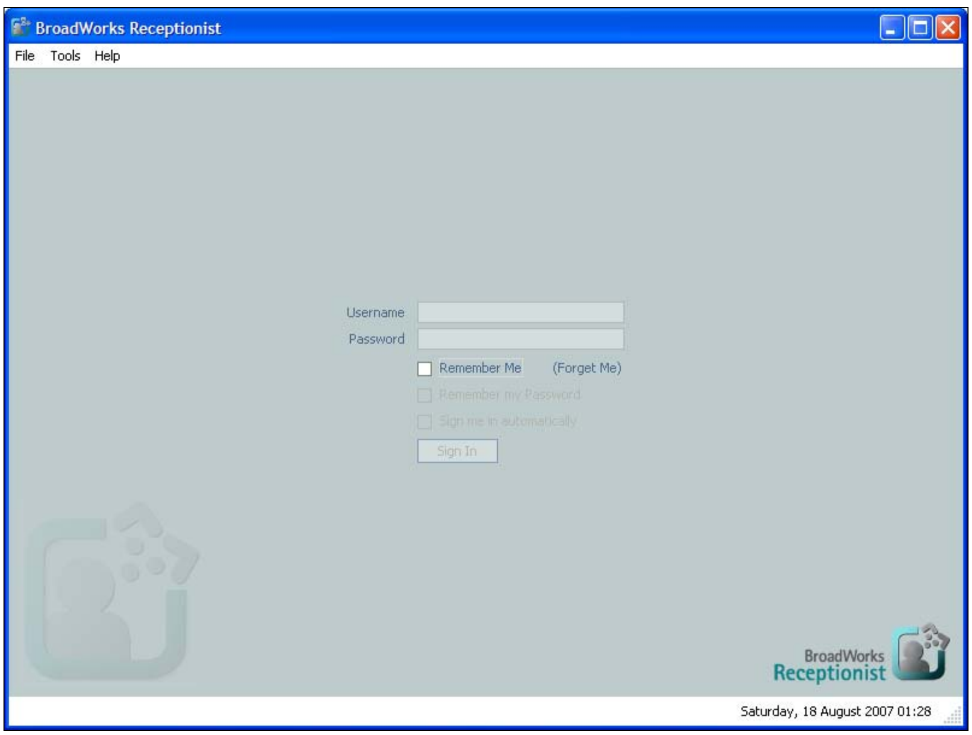


Figure 2 Login Interface

3) From the Tools menu, select *Options*. The *Receptionist - Options* dialog box opens.

4) Click on the *Connection* tab and enter the server's host name and port number for your service provider. To obtain this information, contact your service provider.

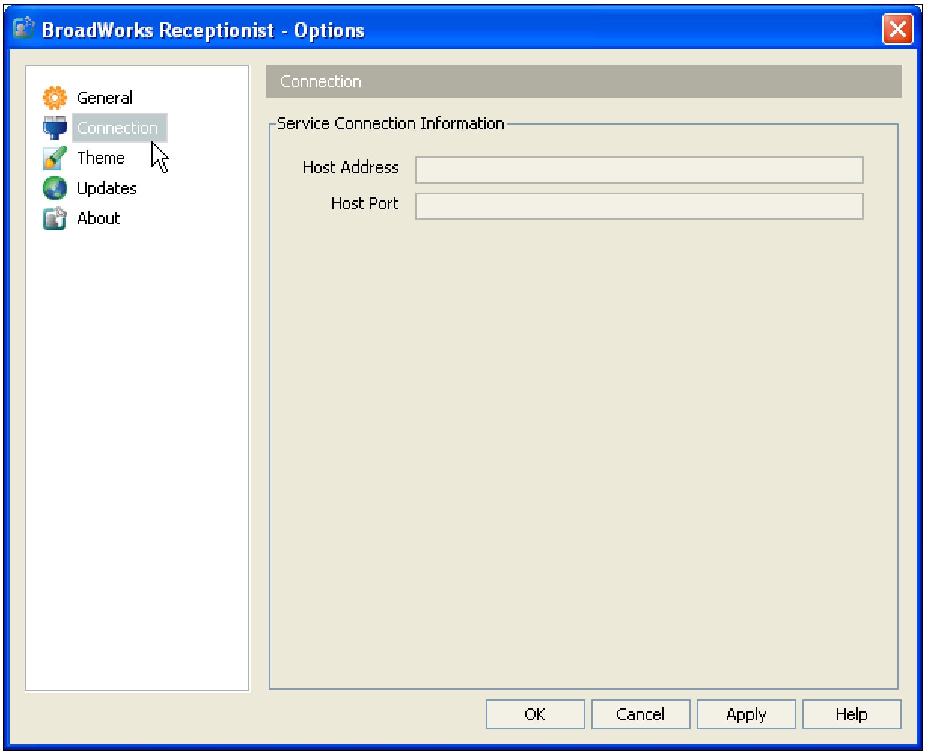


Figure 3 Options Dialog – Connection Page

5) Click on the *Update* tab and enter the proxy connection settings for your network, if it has a proxy server.

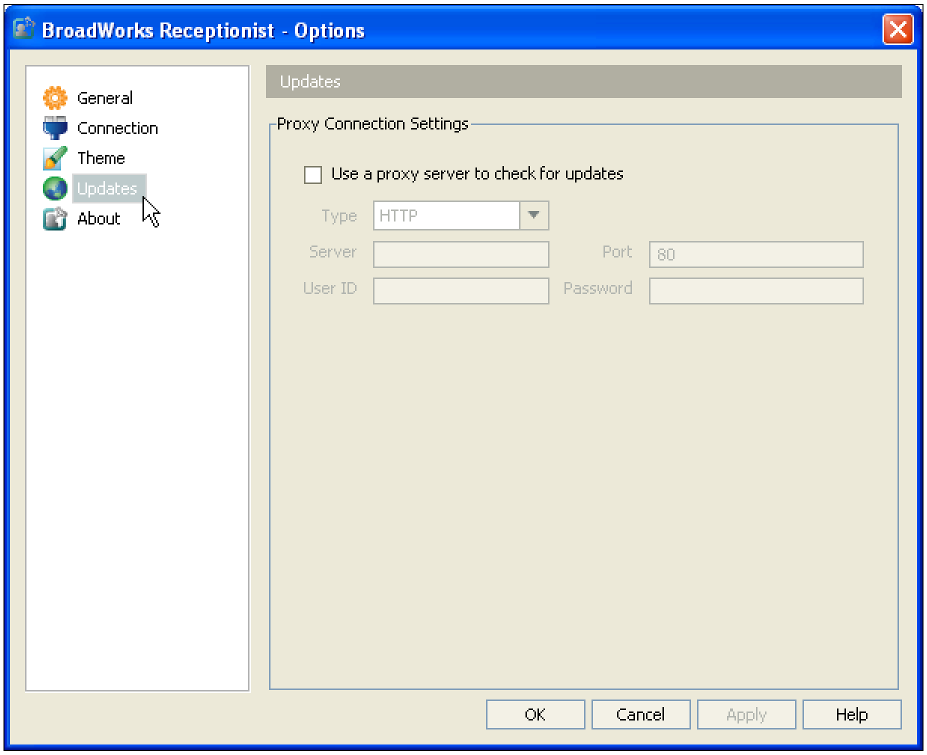


Figure 4 Options Dialog – Updates Page

6) Click **OK**.

7) Click **LOG IN** from the login screen.

1.5 Subsequent Use

1) Navigate to the program group **BroadSoft**, followed by **BroadWorks Receptionist**.
2) Click the **BroadWorks Receptionist** shortcut.

Figure 5 Start Menu

3) Click **LOG IN**.

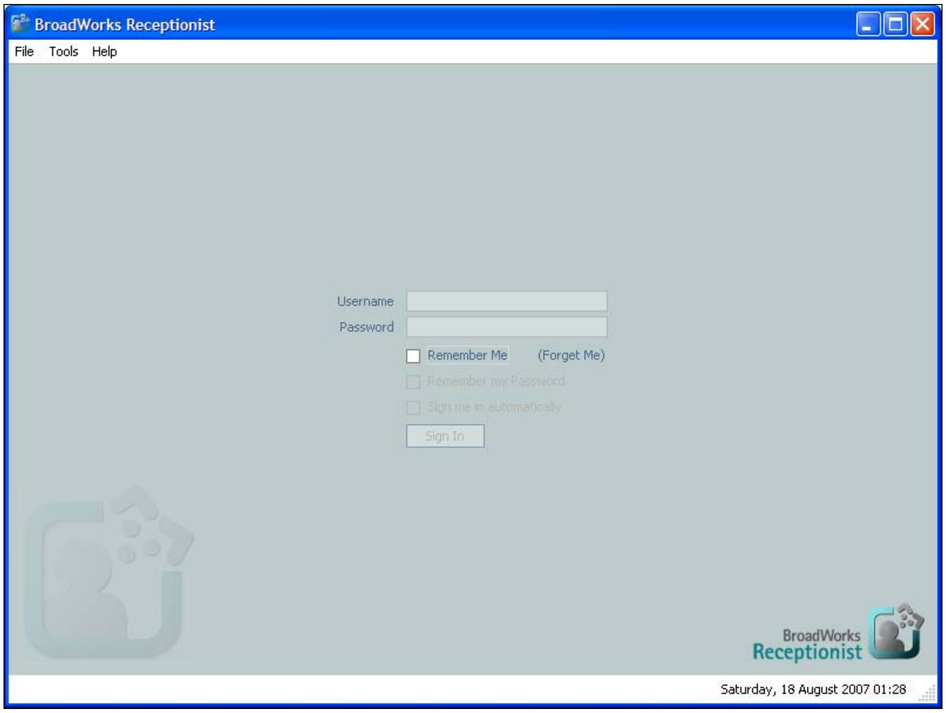


Figure 6 Login Interface

1.6 Configure Queues Settings

You can configure the *Queues* tab to log in to queues each time you log in to Receptionist.

1) Log in to Receptionist.

2) From the Tools menu, select *Options*. The Receptionist *Options* dialog box appears.

3) Click the *Queues* tab.

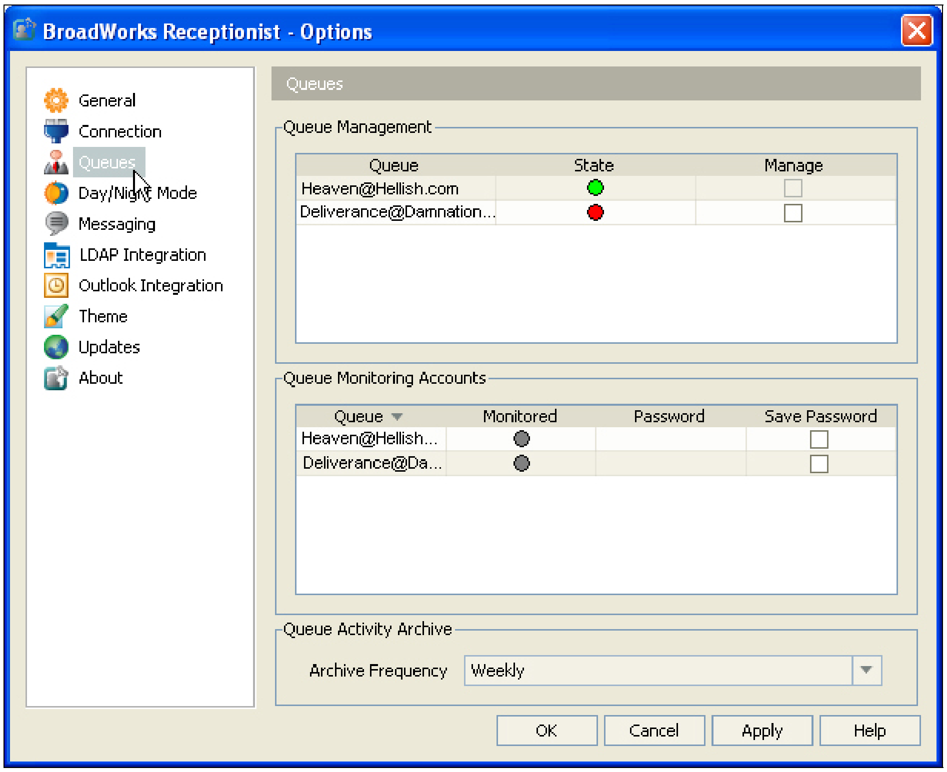


Figure 7 Queues Settings

4) Identify your queue availability by checking the *Manage* box to indicate your participation in each queue. To identify the queues to join:

- Check the *Manage* box for each queue for which you wish to control your join status, by subsequently using the *Joined* drop-down list in the Queue panel on the main interface.
- Type the password in the *Password* text box.
- Check the *Save Password* check box to save the password.

5) Specify the archive settings by checking the archive records and select the frequency with which to archive the records from the drop-down list.

6) Click **OK** or **Apply** to save the changes.

2 Using Receptionist

2.1 The Main Interface

Figure 8 shows the main interface.

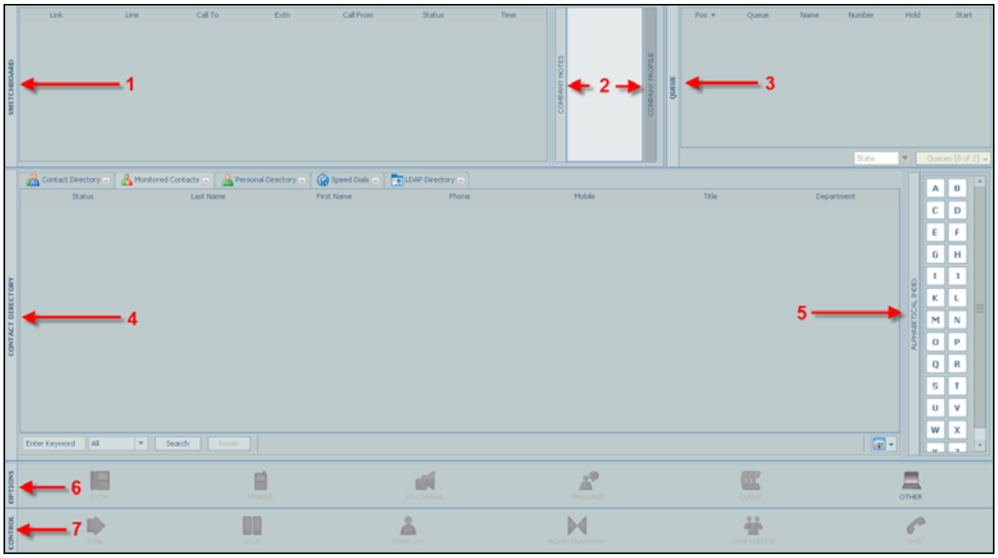


Figure 8 Main Interface

The following legend provides the names to the sections of the main interface. This is followed by more detailed information.

Legend:

1. Switchboard panel
2. Company Notes and Profile area
3. Queue panel
4. Contact Directory panel
5. Alphabetical Index filter
6. Options panel
7. Control panel

Detailed Description

1. Switchboard panel: This is located on the second panel of the main interface.

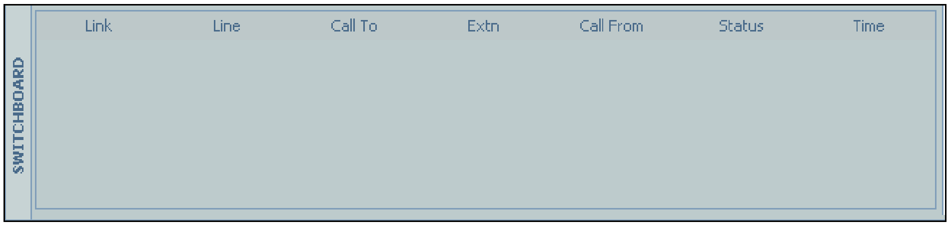


Figure 9 Switchboard Panel

It has the following components (from left to right):

– The *Link* column lets you select the calls to be linked for a Consulted Transfer and Three-Way Conference. You can select the calls to link by clicking in the *Link* column cell for the required call record row.

The appearance of a chain link symbol indicates the activation of this option. Clicking in the cell toggles the link option again.

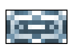


Figure 10 Chain Link Symbol

– The *Line* column shows the order that phone calls come in. They start from 1 and continue.

– The *Call To (Called Party)* column identifies the name of the party being called by the operator. A name is typically displayed when the operator dials an internal number that is in the *Contact* directory. For more information, see *section 2.4.1 Dial a Contact*. A number is displayed for calls made to persons not in the Contact directory as well as most external calls.

– The *Extension* column displays the actual number dialed by the operator for internal calls.

– The *Call From (Calling Party)* column identifies the person calling the operator. For internal calls this is the contact name assigned to the extension number in the *Contact* directory or the extension number, if no name has been assigned. For external calls, the caller's number is displayed unless the number is blocked (private) or the name is unavailable.

– The *Status* column shows the state of calls on the operator switchboard (phone) and is color-coded as follows:

Call State	Receptionist Release 14.sp4
Active	Active
Held	On Hold (00:00) *(blinks after 45 seconds)*
Camp On	Camped (00:00) *(blinks after 45 seconds)*
Remote Held	Active
Ringing In (Remote)	Incoming
Ringing In (Local)	Incoming

Call State	Receptionist Release 14.sp4
Ringing Out	Outgoing

– The *Time* column displays the duration of the call, including the Ring Time, Hold Time, and Talk Time.

2. The **Company Notes** and **Profile** area is located next to the Switchboard Panel. It lets the operator modify notes and profile content for a given organization. Operators can modify the content as required. For more information, see section *2.14 Keeping Notes*.

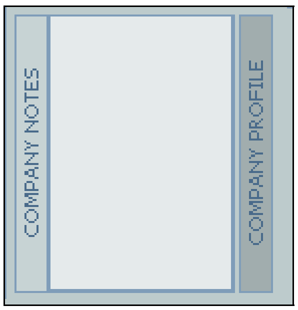


Figure 11 Company Notes and Profile Panel

3. The **Queue** panel is located in the top right-hand panel of the main interface and provides a listing of all calls in the queue. You can show and hide the Queue panel by selecting *View* and then *Queue* from the menu bar.

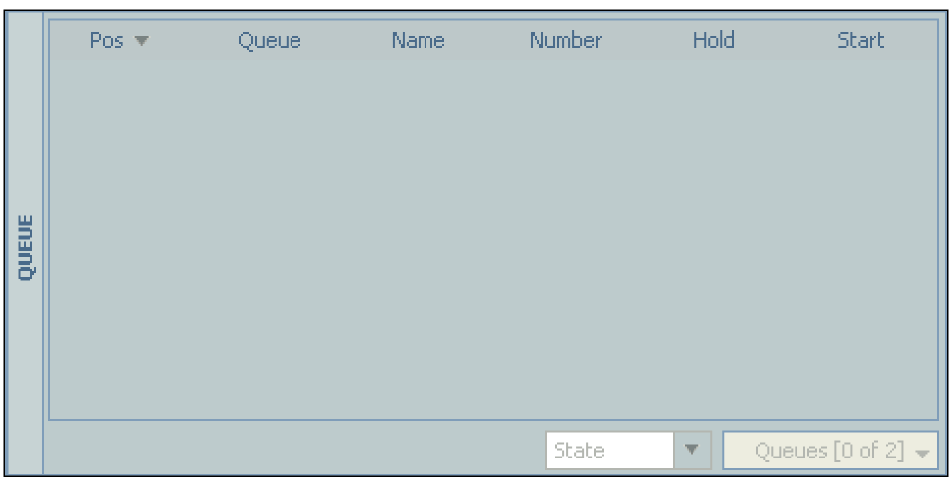


Figure 12 Queue Panel

The operator is provided with the following:

– Position, queue, name, number, hold, and start of each call in the queue

– Ability to receive calls from the queue

– Ability to modify the position of calls in the queue

The Queue panel includes the following components:

- The *Position* column displays the position of the call in the queue.
- The *Queue* column shows the name of the queue each listed call belongs to.
- The *Name* column displays the name of the caller in the queue.
- The *Number* column displays the number of the caller.
- The *Hold* column is the length of time a call has been in the queue.
- The *Start* column displays the time a call entered the queue.

The *Queue* drop-down list displays the list of queues that appear in the Queue panel. A check mark appears to the left of the queues in the Queue panel. To add or remove a queue from the Queue panel, see section *2.12.3 Display Calls in Queue Panel*.

The *Joined* drop-down list determines where you are able to receive calls from the queues managed on the *Queue* tab in the *Options* dialog box. You can select "Join" to receive calls from the queue or "Unjoin" if you do not wish to receive calls from the queue.

To change the position of calls in the queue, see section *2.12.5 Change Position of Calls in Queue*.

4. The **Contact Directory** panel is located as the third panel of the main interface and provides a listing of all contacts available to the operator.

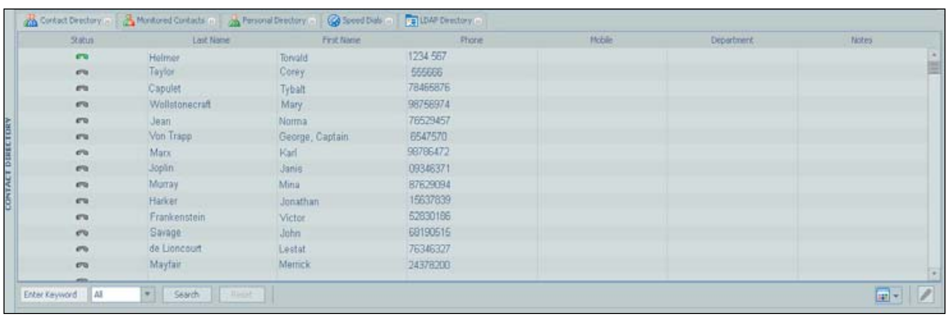


Figure 13 Contact Directory Panel

The operator is provided with the following:

- Contact details including last name, first name, extension, title, and department
- Convenient access to contact telephone numbers and voice mail
- Ability to dial contacts
- Ability to e-mail contacts
- Ability to transfer calls to contacts
- Ability to maintain and update notes for a contact
- Ability to view contact status
- Ability to search contacts using a keyword
- Ability to order contacts in an ascending or descending order
- Ability to filter ordered contacts using alphabetical indexing

The Contact Directory panel has the following components:

– The *Status* column shows the contact's phone on/off hook state. The color of the status is customizable through the *Tools – Tools – Themes* dialog box. The following colors represent the automated different states:

Status	Icon	Description
Green Handset Down		Contact phone is on-hook (available to receive a call) *(previously this was a green triangle).*
Red Handset Up		Contact phone is off-hook (on a call, busy) *(previously this was a red triangle).*
Orange Handset Down		Contact phone is ringing *(previously this was a blue triangle).*
Do Not Disturb		Contact phone has status set to DND *(previously this was an orange triangle).*
Grey Handset Down		Contact phone state is currently unavailable or unknown *(previously there was no triangle or it was blank)*
Private		Contact phone state is set to "private".
Call Forward Always		Contact has the Call Forward Always service turned on. By hovering your mouse over the Call Forward Always contact, the user can see the number the contact has set the Call Forward Always to.

– The *Last Name* column displays the contact's last name as provisioned by the service provider. Only the group/system administrator may change this information.

– The *First Name* column contains the contact's first name as provisioned by the service provider. Only the group/system administrator may change this information.

– The *Phone* column represents the contact's provisioned phone as entered in the service provider directory. Only the group/system administrator may modify this information.

– The *Mobile* column shows the contact's mobile number as provisioned by the service provider. Only the group/system administrator may change this information.

– The *Department* column displays the contact's corporate department or section as provisioned by the service provider. Only the group/system administrator may change this information.

– The *Contact Notes* column allows the operator to modify notes that are specific to a contact. The note is retained for subsequent application sessions.

– The *Alphabetical Index* provides you with the ability to alphabetically search/filter the Contact Directory.

– The *Keyword Search Filter* Text area allows the operator to enter a keyword/number (or the beginning of a keyword or number) to enable a keyword search. For example, a search for the contact with the first name David may be made by entering "David" or the letter "D" in the *Search* field. In the first case all contacts with the first name David would be listed, whereas in the latter case all contacts whose first name starts with a "D" would be listed.

– The *Keyword Search Filter* drop-down list allows the operator to choose a directory field for a keyword search. The value selected from this filter drop-down list is the column in which Receptionist searches for the keyword entered in the *Search* field, as well as the directory.

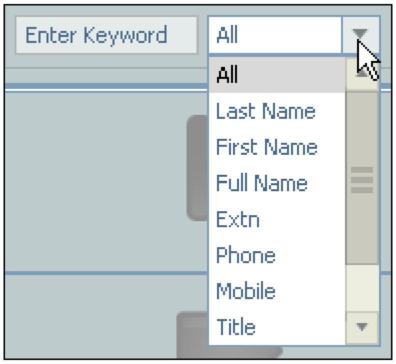


Figure 14 Keyword Search Filter List

– The Keyword Search Filter button enacts a keyword search based on the keyword and the *Search* fields entered, when clicked.

– The Reset button when clicked, displays the full list of contacts, removing the effects of previous searches and filters.

– The *Contact Directory* drop-down list allows you to choose the directory to appear in the Contact Directory panel. The default directories include the following:

  – **BroadWorks Contact Directory**: Other subscribers in your BroadWorks contact directory

  – **BroadWorks Personal Directory**: All contacts in your personal directory

  – **Speed Dials Directory**: All numbers configured for your Speed Dial service. (Only available in Receptionist Enterprise and Receptionist Small Business)

  – **Phone Status Monitoring**: A list of users whose phone status you are currently monitoring. (Only available in Receptionist Enterprise)

  – **LDAP Directory**: All users found in the LDAP directory. (Only available in Receptionist Enterprise)

  – **Custom Contact Directory**. This directory is created and customized by the group/system administrator. It has the same contact status monitoring capabilities as the Contact Directory. (It is only available in Receptionist Enterprise.)

– The List View/Detail View button supports the display of contacts to be arranged in two views. Click the **List View/Detail View** button to toggle between the two views.

Figure 15 List View/Detail View

– The Add button allows you to add an entry to the directory currently displayed in the Contact Directory panel. This button is only enabled for directories in which you have the ability to add contacts, such as the *Speed Dial* directory. The Speed Dial directory is only available in Receptionist Enterprise and Receptionist Small Business.

– The Edit button allows you to edit the entry currently selected in the Contact Directory Panel. This button is only enabled for directories in which you have the ability to edit contact fields, such as the Speed Dial directory (unavailable in Receptionist Office), or to add notes to contacts, such as in the Contact directory.

– The Delete button lets you remove the entry currently selected in the Contact Directory panel. This button is only enabled for directories in which you have the ability to delete contacts entirely, such as the Speed Dial directory (which is unavailable in Receptionist Office).

5. The **Alphabetical Index** panel is located as the fifth panel of the main interface.

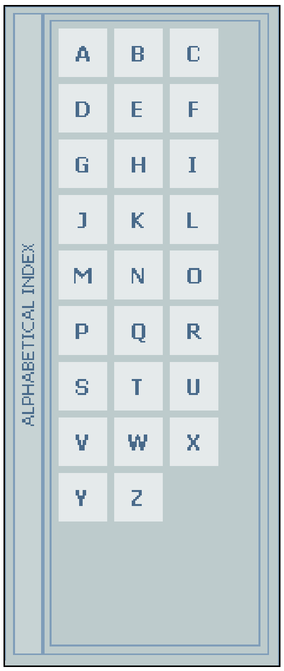


Figure 16 Alphabetical Index Panel

This can be used to refine a search by clicking the starting letter of the contact's name. For example, to display all contacts with a first name beginning with the letter "M", click **M** on the Alphabetical Index.

6. The **Options** panel is located as the fourth panel of the main interface. When the Receptionist interface is resized (full screen or otherwise), the Options panel size remains unchanged. This allows for the Contact Directory panel to display a maximum number of contacts. However, the size can be changed manually. It has the following components:

Figure 17 Options Panel

– The EXTN button allows you to transfer a call (for more information, see section *2.7 Transfer Call*) or make a call (for more information, see section *2.4 Managing Calls*) to a selected contact's extension. If this icon is dull in appearance, the contact does not have an extension number associated with the contact's name in the Contact Directory. Only the group/system administrator can modify this number.

– The MOBILE button allows you to transfer a call (for more information, see *2.7.1 Blind Transfer Call*) or make a call (for more information, see section *2.4 Managing Calls*) to a selected contact's mobile phone. If this icon is dull in appearance, the contact does not have a mobile number associated with the contact's name in the computer database. Only the group/system administrator can modify this number.

– The VOICE MAIL button allows you to transfer a call (for more information, see section *2.7.1 Blind Transfer Call*) to a selected contact's voice mail. If this icon is dull in appearance, the contact does not have voice mail configured. Only the group/system administrator can modify this number.

– The MESSENGER button allows you to send messages via e-mail to a contact listed in your Contact Directory (for more information, see section *2.15 Messaging Contacts*). If this icon is dull in appearance, the contact does not have an e-mail address configured in the company database. Only the group/system administrator can modify this setting.

– The QUEUE button allows you to place the call in a queue. For more information on managing queues, see section *2.12 Managing Queues.*

– The OTHER button, when clicked, displays a dial pad used to enter an ad hoc number. This feature allows you to transfer a call (for more information, see section *2.7.1 Blind Transfer Call*) or make a call to another number (for more information, see section *2.4 Managing Calls*).

7. The **Control** panel is used to execute call actions. Call actions can also be performed by clicking on **Actions** in the Menu panel and selecting the desired function. When the Receptionist interface is resized (full screen or otherwise), the Control panel size remains unchanged. This allows for the Contact Directory panel to display a maximum number of contacts. However, the size can be changed manually. The panel contains the following areas:

Figure 18 Control Panel

– The DIAL button is used to start the dialing process to the number you have selected. You can make a call to a contact when a contact is highlighted and you can make a call to another number when the dial pad has been used. This button is dull in appearance when this action is not an option. When messaging, the "Dial" button changes to "Send".

– Clicking on HOLD allows you to place a call on:

  – Hold: When a call is active.

  – Unhold: When a call is on hold.

  – Answer: When a call is ringing.

- Hold Conference: When a conference is active.
- Unhold Conference: When a conference is on hold.

  For more information, see section *2.5.1 Hold Call*.

- The Camp On button allows you to camp the contact selected when they are in a busy call state. Uncamp is enabled when the contact selected is in a busy call state. The Camp function is only available in Receptionist Enterprise and Receptionist Small Business.
- The Transfer button allows you to perform a variety of control functions depending on the context of the active call. The following dynamics change the button based on the call context:
  - Blind Transfer: Is enabled when the contact selected is in an available call state.
  - Voice Mail Transfer: Is enabled when the contact selected is in an available call state.
  - Consulted Transfer: Can be enabled when two call parties are linked using the switchboard.
  - Queue Transfer: Is enabled when you are logged in to a queue.
  - Conference Exit: Is when a conference is in an active state and you wish to exit it.
- The Conference button allows you to perform a variety of control functions, depending on the context of the active call. The following dynamics change the button based on the call context:
  - Conference: Is enabled when two call parties are linked on the switchboard.
  - End Conference: Is enabled when a conference is active.
  - Operator Barge-In: Is when the contact selected is in a busy call state.
  - Directed Call Pickup: Is enabled when the contact selected is in a ringing call state.
- Click **END** to disconnect the selected switchboard call.

2.2 Tools Dialog

The *Tools* dialog box is used to configure user/service provider settings and preferences. The dialog box can be displayed from the Tools menu by selecting *Tools – Options*. It is available on both the login and main interface pages. The dialog box displays the categories shown in the following sub-sections:

2.2.1 General Tab

The *General* tab contains miscellaneous features that improve the usability of Receptionist.

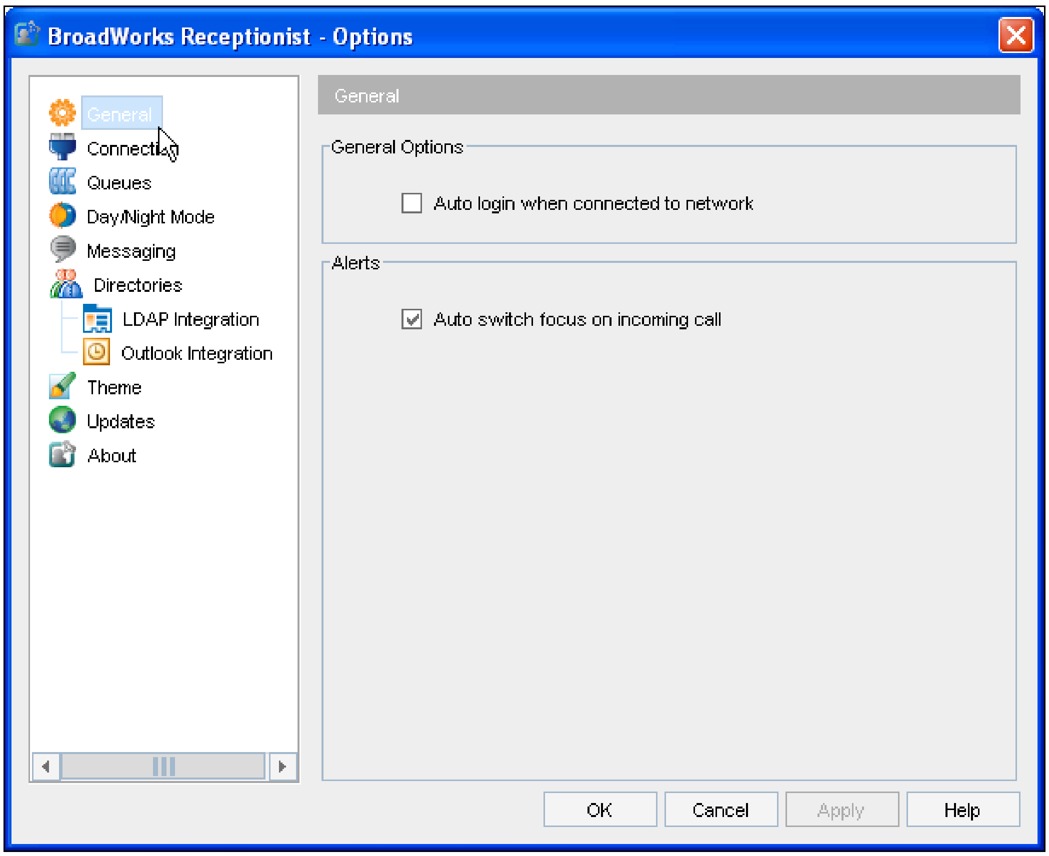


Figure 19 Options – General

The *General Options* are as follows:

- *Auto login when connected to network* enables Receptionist to automatically connect and log in to the server when it detects a network connection.

The *Alerts* are as follows:

- *Auto switch focus on incoming call* enables Receptionist to automatically take window focus over other applications when a new incoming call is received.

2.2.2 About Tab

Click on the *About* tab to find version information and read the general disclaimer for Receptionist.

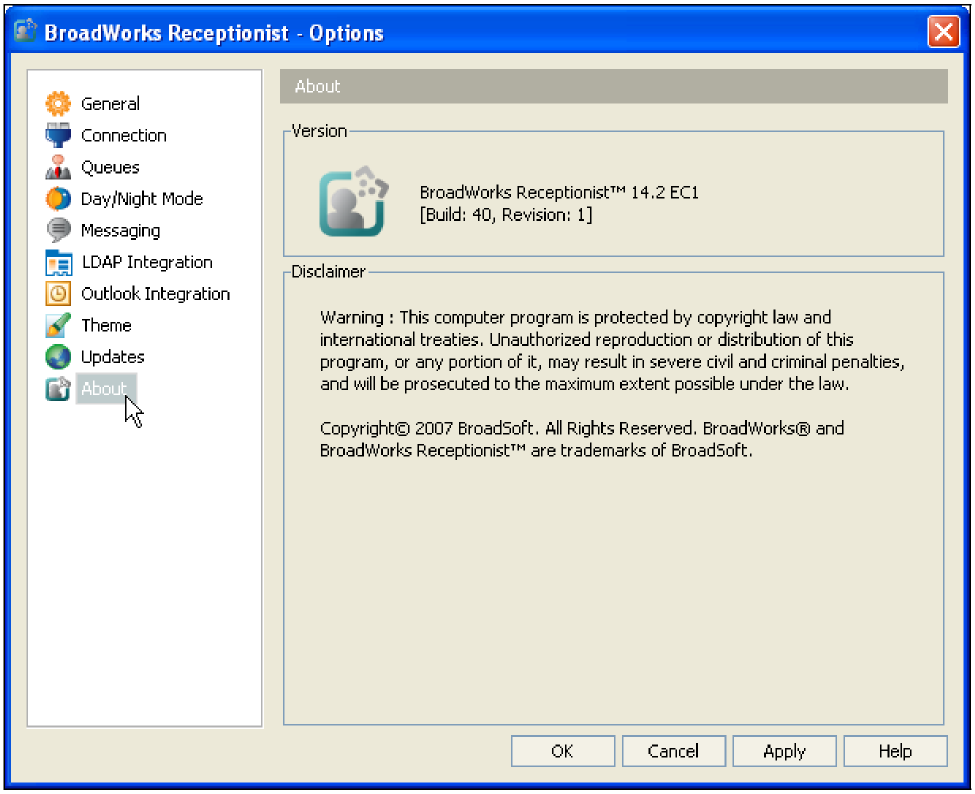


Figure 20 Options – About

The information displayed is as follows:

- BroadWorks Receptionist Version
- BroadWorks Receptionist Disclaimer

The About information is important in providing information for the purpose of technical support.

2.2.3 Connection Tab

Click on the *Connection* tab to configure the connection information required to connect to your service provider.

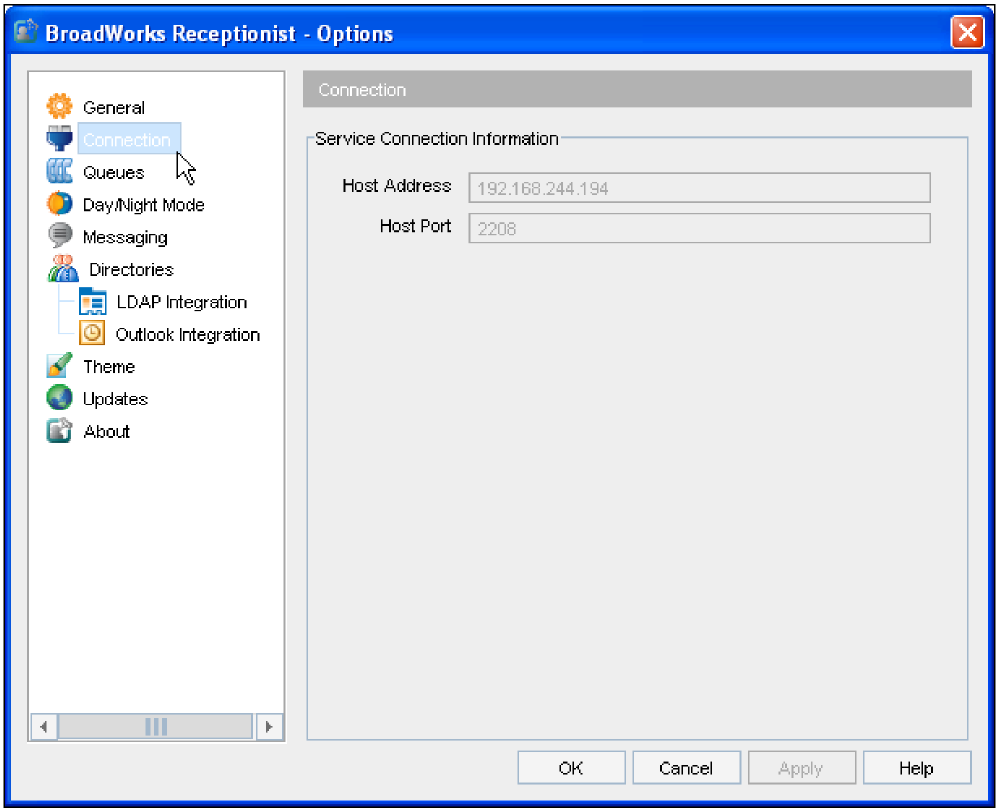


Figure 21 Options – Connections

The *Server Connection Information* is as follows:

- The *Host Address* is the host name/IP address for service. This is compulsory and can be obtained from the service provider.
- The *Host Port* is the port number for service. This is compulsory and can be obtained from the service provider.

2.2.4 Queues Tab

Click on the *Queues* tab to configure the queue credentials required to access queue functionality in Receptionist.

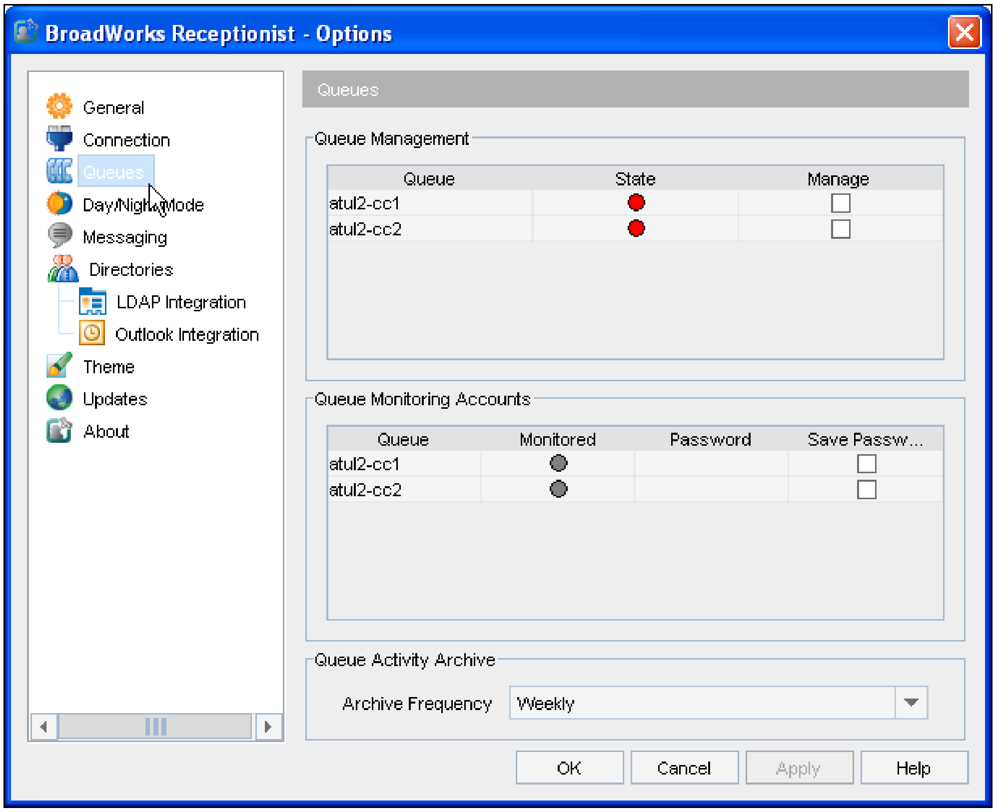


Figure 22 Options – Queues

The *Queue Management* options are as follows:

- *Queue* is the identification name of the Queue. It is read-only.
- *Joined* displays your queue joined status. Green is joined. Red is unjoined.
- *Manage*, when checked, ensures that the queue is visible and can be manipulated.

The *Queue Monitoring Accounts* options are as follows:

- *Queue* is the identification name of the Queue. It is read-only.
- *Monitored* displays the login status. Grey is not logged in. Yellow means it is attempting to log in. Red shows that login failed. Green indicates that you are currently logged in.
- *Password* is the required Queue password.
- *Save Password* saves the encrypted password. Click to save the password.

2.2.5 Day/Night Mode Tab

The *Day/Night Mode* tab configures day/night mode call settings. This is useful to turn on at the end of your work day when you want to forward calls either to another number or to your voice mail. This tab is only configured once you have logged in.

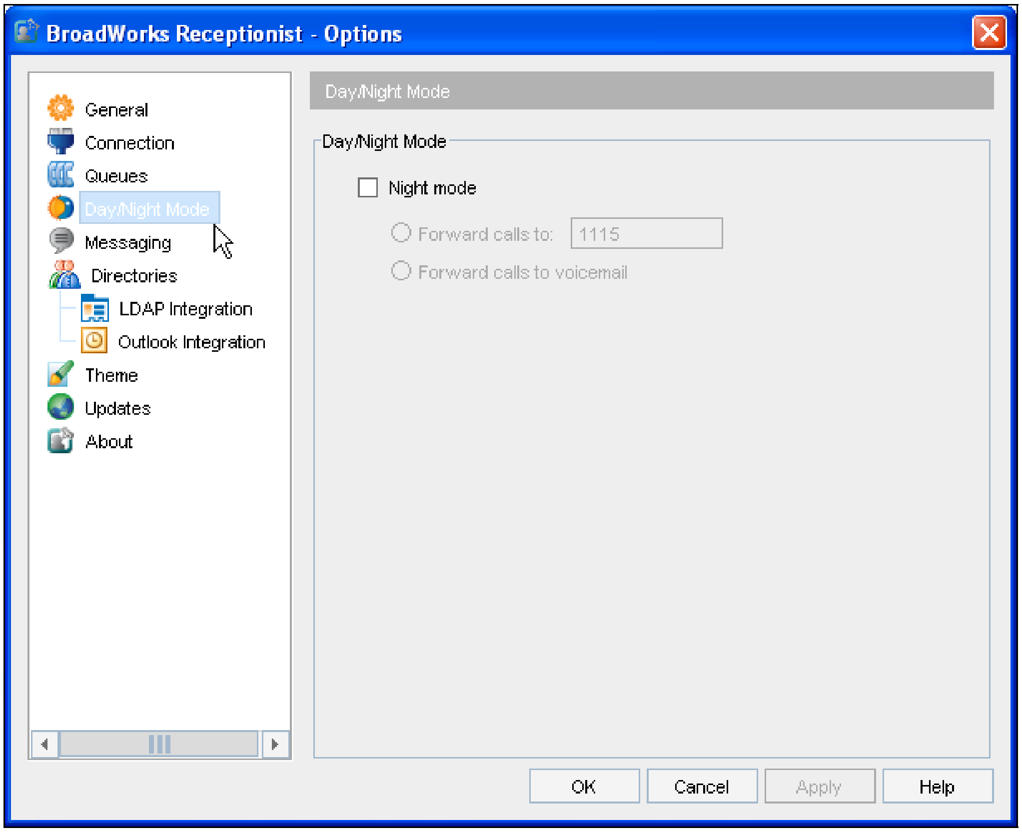


Figure 23 Options – Day/Night Mode

The *Day/Night Mode* options are as follows:

- The *Night mode* option turns the night mode on and off.
- *Forward calls to* forwards incoming calls to the specified phone number. All calls to your extension are directly forwarded to this number.
- *Forward calls to voice mail* option forwards incoming calls to your voice mail. All calls to your extension are directly forwarded to your voice mail. Your voice mail must be set up properly for this to work.

2.2.6 Messaging Tab

Click on the *Messaging* tab to configure e-mail service settings and messaging preferences.

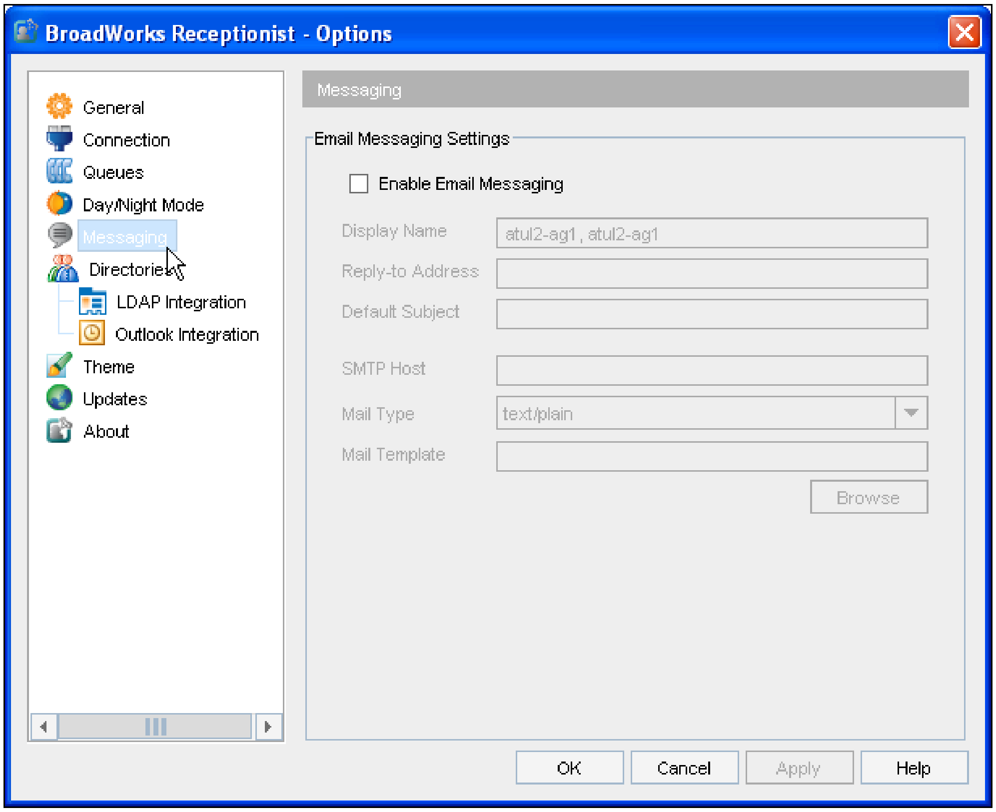


Figure 24 Options – Messaging

To be able to send e-mail messages to contacts listed in your directory, it is necessary for you to check the *Enable Email Messaging* option on this tab. The section that follows the *Enable Email Messaging* option configures your e-mail settings and is available only when the option is selected.

The options are as follows:

- *Enable Email Messaging* allows/disallows messaging as a contact option on the Options panel. It is compulsory if you want to have messaging available.
- *Display Name* is the name of the person who is sending the message. This is the e-mail user name and it is compulsory.
- *Reply-to Address* is the mailbox address to which messages in reply are delivered. This is the e-mail password for the above mentioned user name and it is compulsory.
- *Default Subject* option defines a default subject to save you from having to type it in each message.
- *SMTP Host* is the compulsory SMTP mail server host address.
- *Mail Type* option selects the formatting of message content. By default, messages are sent as plain text.

- *Mail Template* allows you to choose a mail template to aid in the formatting of the message sent.

2.2.7 Directories Tab

Click on the *Directories* tab to configure which Directory is visible on startup of Receptionist.

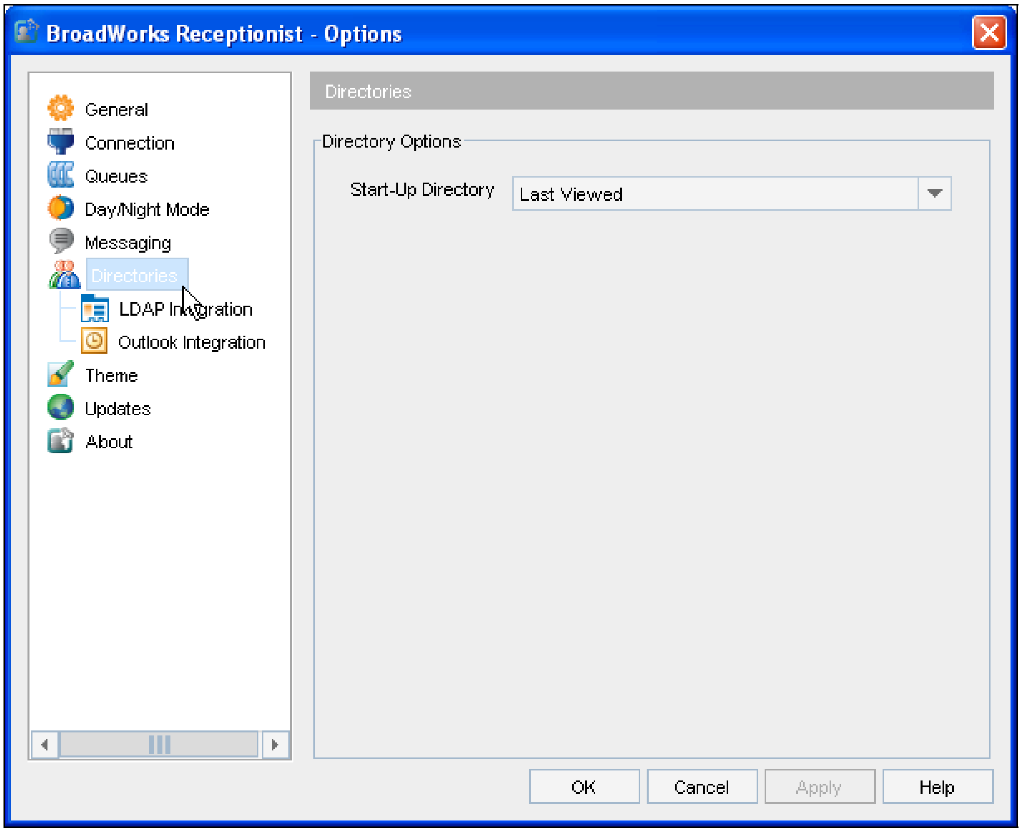


Figure 25 Options – Directories

The *Directory Option* is:

The *Start-up Directory* drop-down list. Click on the drop-down list to select from the last viewed directory or any other directory available to the user.

2.2.8 LDAP Tab

Click on the *LDAP* tab to modify the look and feel of Receptionist.

Contact your service provider or system administrator if you do not know the appropriate settings.

NOTE: Make sure you have correctly imported a valid certificate in the Java Key Store (JKS) with the *keytool* using the following procedure:

1. Click **Start** button and select “Run…”.

2. Type “cmd” and click **OK**.

3. Type “<Java Runtime Path>\bin\keytool -import -alias <aliasname> -file <path><certificate file name> -keystore %JAVA_HOME%\jre\lib\security\cacerts”.

To verify the certificate:

1. Click **Start** button and select “Run…”.

2. Type “cmd” and click **OK**.

3. Type “<Java Runtime Path>\bin\keytool -printcert -file <path><certificate file name>”.

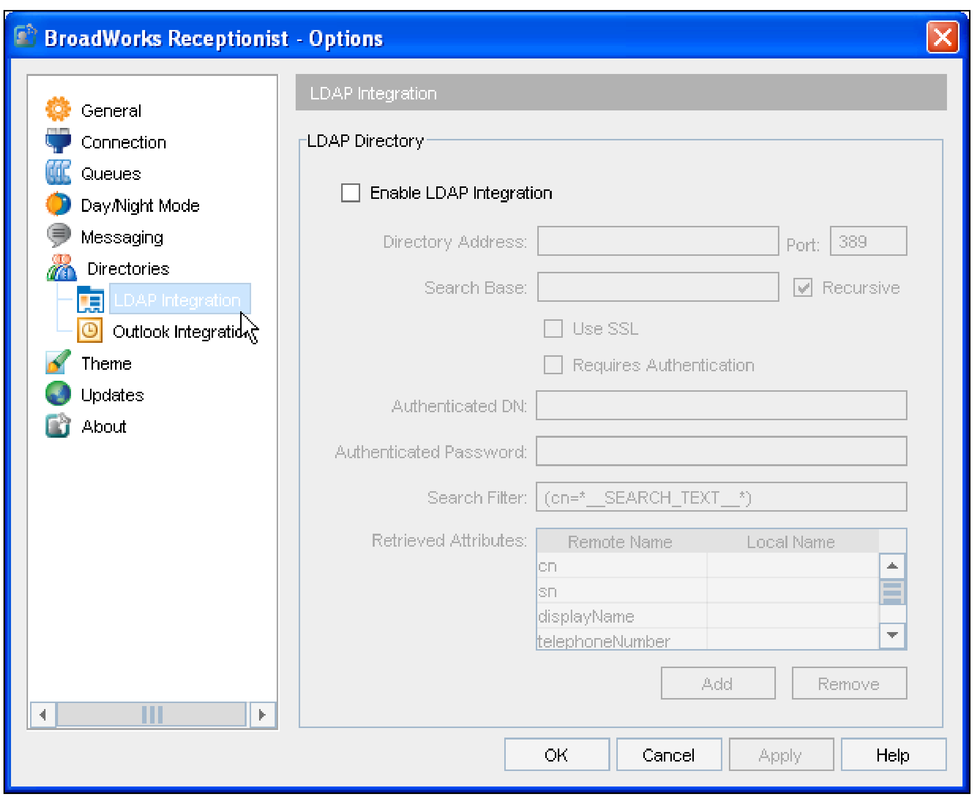


Figure 26 Options – Directories – LDAP Integration

- *Enable LDAP Integration* determines whether Receptionist provides LDAP directory lookup services. Checking this box enables the controls on the *Directory* page.
- *Directory Address* specifies the network address of the LDAP directory server.
- *Port* is the port number for the LDAP server. This is compulsory and can be obtained from the service provider.
- *Search Base* determines the location in the directory server tree that Receptionist looks in when executing a search.
- *Recursive*, when checked, searches all sub-trees within the search base until the specifications are found.
- *Use SSL* (Secure Sockets Layer) determines whether Receptionist uses SSL to connect to the directory server. Note that enabling SSL may require the use of a different port.
- *Requires Authentication* indicates whether Receptionist must provide a user name and password to the directory server to conduct searches.
- *Authenticated DN* is the user name Receptionist uses when connecting to the directory server when *Requires Authentication* is checked.
- *Authenticated Password* corresponds to the *Authentication DN*.
- *Search Filter* specifies an additional search filter to apply to all directory searches. For example, to include the search criteria in the filter you must include (cn=*__SEARCH_TEXT__*). Alternatively, in another example, "(telephoneNumber=*)" restricts search results to users who have a telephone number assigned.
- *Retrieved attributes* is a table that controls the way that Receptionist maps attributes returned from the directory server to columns displayed in the list of search results.
- In each row of the table, enter an *LDAP* attribute in the *Remote Name* column. In the *Local Name* column, enter a corresponding local attribute. Possible values are: "FullName", "BusinessPhone", "ExtensionNumber", "MobilePhone", "HomePhone", and "EMailAddress".

2.2.9 Outlook Integration Tab

Click on the *Outlook Integration* tab to enable and disable the use of Microsoft Outlook with Receptionist.

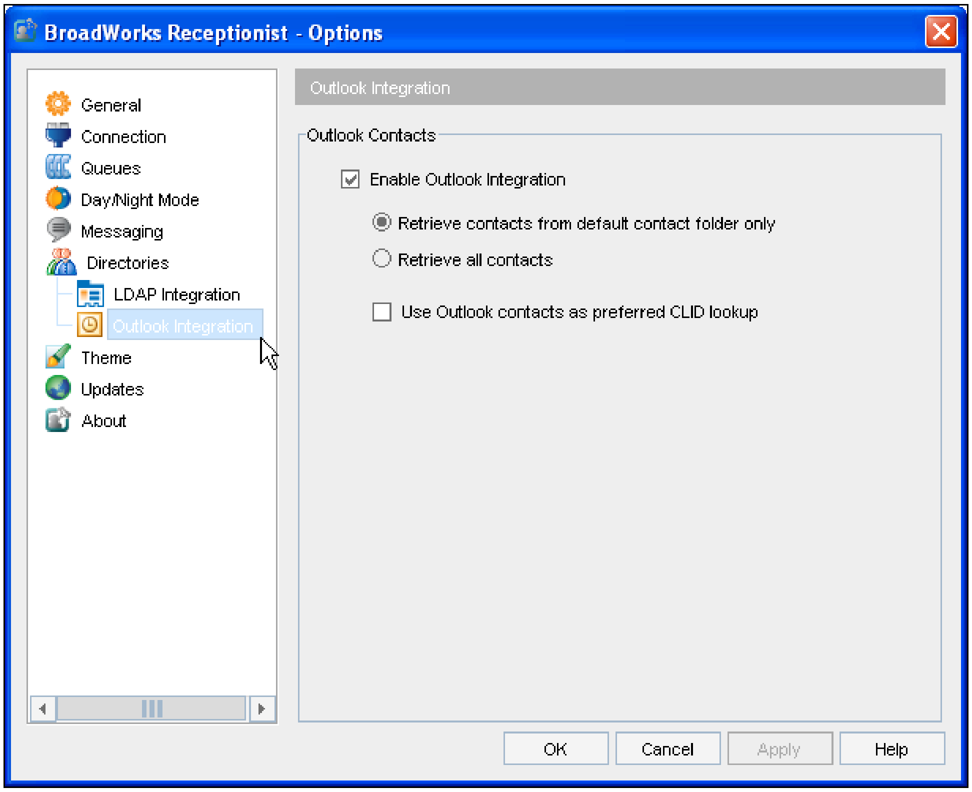


Figure 27 Options – Outlook Integration

- The *Enable Outlook Integration* check box, when checked, makes sure that the Outlook integration features are activated. When unchecked, the toolbar is unavailable within Outlook and you are unable to dial contacts directly.
- The *Retrieve contacts from default contact folder only* option searches for and retrieves contacts stored in the default *Contacts* folder within Outlook.
- The *Retrieve all contacts* option searches for and retrieves contacts stored in any Outlook folder.
- *Use Outlook contacts as preferred CLID lookup* (for incoming calls) when checked, uses the information saved in your Outlook contact list when displaying information about callers, instead of using group settings or other calling line ID information.

2.2.10 Theme Tab

Click on the *Theme* tab to modify the look and feel of Receptionist.

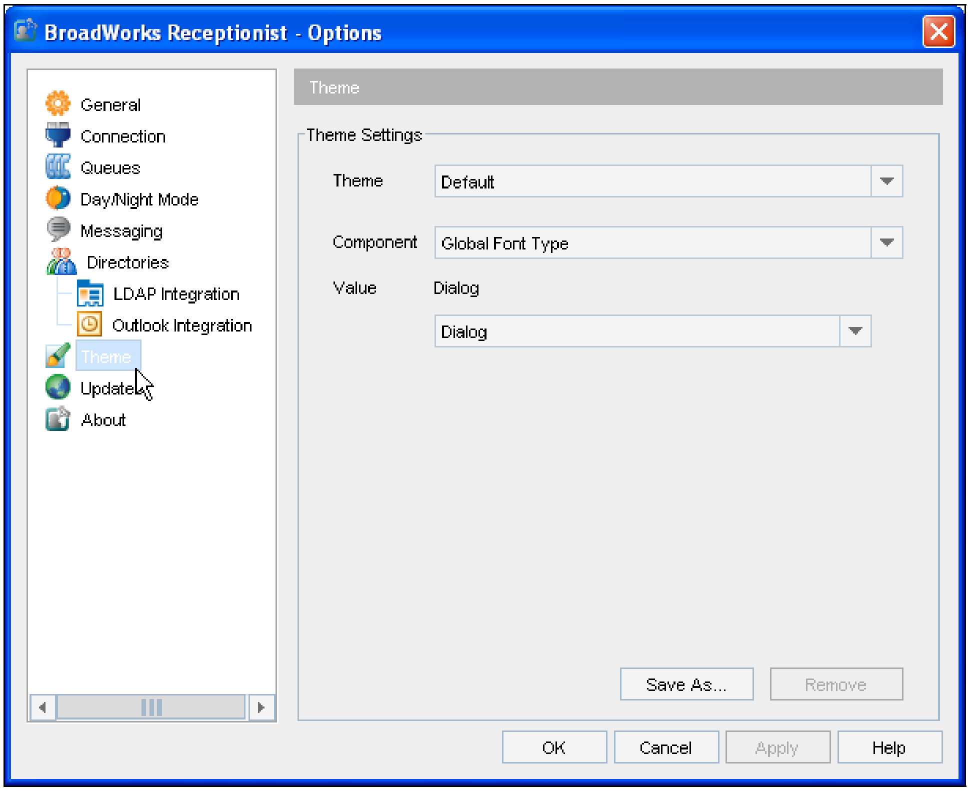


Figure 28 Options – Theme

The configuration of the look and feel of Receptionist is categorized as follows:

- Global font type
- Standard control font style
- Panel header font style
- Slide panel header font style
- Login panel color
- Login panel font color
- Login panel logo
- Login panel background image
- Switchboard panel color
- Switchboard panel font color
- Contact directory panel color
- Contact directory panel font color
- Alpha index button font style
- Contact status icon for “unknown”

- Contact status icon for “on hook”
- Contact status icon for “off hook”
- Contact status icon for “call incoming”
- Contact status icon for “do not disturb”
- Contact status icon for “call forward always”
- Contact status icon for “private”
- Option panel color
- Option panel font color
- Option panel button font style
- Dial pad font style
- Control panel color
- Control panel font color
- Control button font style

For a selected item, the components may be chosen from the *Component* drop-down menu.

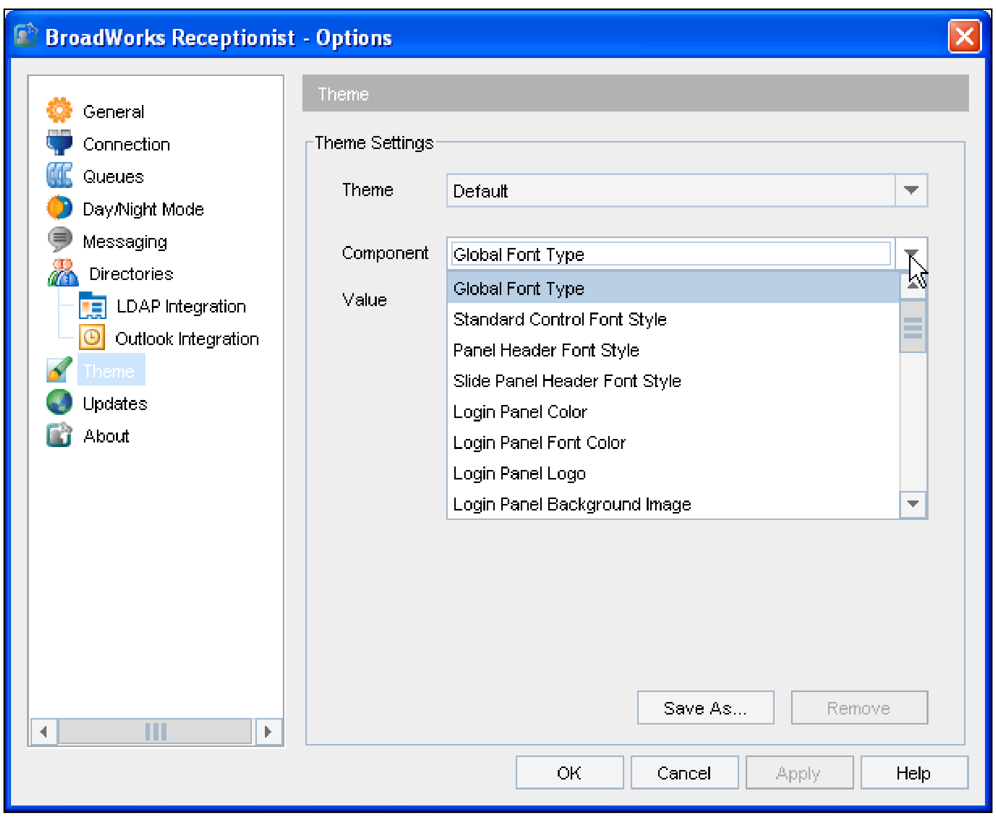


Figure 29 Options – Component Selection

Global font type

Altering this theme component enables you to change the font of all of the text used in Receptionist. This includes numerals and menu items.

Standard control font style

Altering this theme component changes the size and font style of the text throughout Receptionist. The size ranges from 8 to 16. The different types are plain, bold, and italic.

Panel header font style

Altering this theme component changes the size and type of the text on all the main screen panel headers situated to the left of the panels. The affected panels are the Switchboard panel, the Queue panel, the Contact Directory panel, the Options panel, and the Control panel. The size ranges from 8 to 16 and the different types are plain, bold, and italic.

Slide panel header font style

Altering this theme component changes the size and type of the text on all main screen slide panel headers. The affected components are the Company Notes, the Company profile, and the Alphabetical Index slide panel headers. The size ranges from 8 to 16 and the different types are plain, bold, and italic.

Login panel color

Altering this theme component enables you to change the color of the Login screen background. This is a standard grey unless modified.

Login panel font color

Altering this theme component changes the color of the font located on the Login screen. The user name, password, and check boxes change to the chosen color.

The text would ideally be challenged to white for darker title bar panel colors or black for lighter title bar panel colors. All you must do is make sure that the color combination you decide on does not render the text illegible.

Login panel logo

Altering this theme component enables you to change the logo located at the bottom right-hand corner of the login interface. This component can only be modified with a GIF, JPEG, or PNG graphic file that is approximately 180 x 64 pixels in size.

Login panel background image

Altering this theme component enables you to change the login interface background image. This component can only be modified with a GIF or JPEG graphic file that is approximately 269 x 272 pixels wide. The interface automatically scales graphics that are smaller or larger than needed.

Switchboard panel color

Altering this theme component enables you to modify the background color of the Switchboard panel, Company Notes, and Profile and Queue panel. All other components within this panel are set to black or white percentage transparencies of this panel color. When modifying this component, make sure it is of a color depth that allows for legibility of the text and other elements within this panel.

Switchboard panel font color

Altering this theme component changes the color of the font located on the Switchboard panel, Company Notes, and Profile and Queue panel. The text would ideally be challenged to white for darker title bar panel colors or black for lighter title bar panel colors. All you must do is make sure that the color combination you decide on does not render the text illegible.

Contact directory panel color

Altering this theme component enables you to modify the background color of the Contact Directory panel. All other components within this panel are set to black or white percentage transparencies of this panel color. When modifying this component, make sure it is of a color depth that allows for legibility of the text and other elements within this panel.

Contact directory panel font color

Altering this theme component changes the color of the font located on the Contact Directory panel, Alphabetical Index, and Directory tabs. The text would ideally be challenged to white for darker title bar panel colors or black for lighter title bar panel colors. All you must do is make sure that the color combination you decide on does not render the text illegible.

Alphabetical index button font style

Altering this theme component changes the size and type of the text on the Alphabetical Index buttons. The size ranges from 8 to 16 and the different types are plain, bold, and italic.

Contact status icon – "Unknown"

Altering this theme component changes the image used to illustrate an "unknown" or unavailable call. The standard image is a grey phone. This component can only be modified with a GIF or JPEG graphic file that is approximately 7 x 16 pixels wide.

Contact status icon – "On Hook"

Altering this theme component changes the image used to illustrate an "on hook" or available call. The standard image is a green phone. This component can only be modified with a GIF or JPEG graphic file that is approximately 7 x 16 pixels wide.

Contact status icon – "Off Hook"

Altering this theme component changes the image used to illustrate an "off hook" call. An "off hook" calls means the contact is already on a call or is busy. The standard image is a red phone. This component can only be modified with a GIF or JPEG graphic file that is approximately 7 x 16 pixels wide.

Contact status icon – "Call Incoming"

Altering this theme component changes the image used to illustrate a "Call incoming" call. The standard image is an orange phone. This component can only be modified with a GIF or JPEG graphic file that is approximately 7 x 16 pixels wide.

Contact status icon – "Do Not Disturb"

Altering this theme component changes the image used to illustrate a "Do Not Disturb" call. "Do Not Disturb" is set by the contact. The standard image is a stop sign. This component can only be modified with a GIF or JPEG graphic file that is approximately 7 x 16 pixels wide.

Contact status icon – “Call Forward Always”

Altering this theme component changes the image used to illustrate a “Call Forward Always” call. “Call Forward Always” is set by the contact. The standard image is a stop sign. This component can only be modified with a GIF or JPEG graphic file that is approximately 7 x 16 pixels wide.

Contact status icon – “Private”

Altering this theme component changes the image used to illustrate a “Private” call. A “private call” means the contact has chosen to withhold their number. The standard image is a red circle with a white dash through it. This component can only be modified with a GIF or JPEG graphic file that is approximately 7 x 16 pixels wide.

Options panel color

Altering this theme component enables you to modify the background color of the Options panel. All other components within this panel are set to black or white percentage transparencies of this panel color. When modifying this component, make sure it is of a color depth that allows for legibility of the text and other elements within this panel.

Options panel font color

Altering this theme component changes the color of the font located on the Options panel and the buttons. Inactive buttons are a greyer shade of the color chosen. The text would ideally be challenged to white for darker title bar panel colors or black for lighter title bar panel colors. All you must do is make sure that the color combination you decide on does not render the text illegible.

Options panel button font style

Altering this theme component changes the size and type of the text on Options panel buttons. The size ranges from 8 to 16 and the different types are plain, bold, and italic.

Dial pad font style

Altering this theme component changes the size and type of the text on the dial pad for the “Other” button. This comes in to view when “Other” is clicked once. The size ranges from 8 to 16 and the different types are plain, bold, and italic.

Control panel color

Altering this theme component enables you to modify the background color of the Control panel. All other components within this panel are set to black or white percentage transparencies of this panel color. When modifying this component, make sure it is of a color depth that allows for legibility of the text and other elements within this panel.

Control panel font color

Altering this theme component changes the color of the font located on the Control panel and the buttons. Inactive buttons are a greyer shade of the color chosen. The text would ideally be challenged to white for darker title bar panel colors or black for lighter title bar panel colors. All you must do is make sure that the color combination you decide on does not render the text illegible.

Control panel button font style

Altering this theme component changes the size and type of the text on Control panel buttons. The size ranges from 8 to 16 and the different types are plain, bold, and italic.

2.2.11 Theme Loading and Saving

The theme refers to how the interface appears, which includes the colors in which the various panels, buttons, logos, and text are displayed, the size of each component, and the manner in which they are displayed in terms of spacing and size.

The default theme such as "standard.thm" is used for the visual display of Receptionist, and this theme is automatically loaded when the application is turned on.

If you, as a user, wish to apply a different them to the application, do the following:

1) Select a theme from the *Theme* drop down menu.

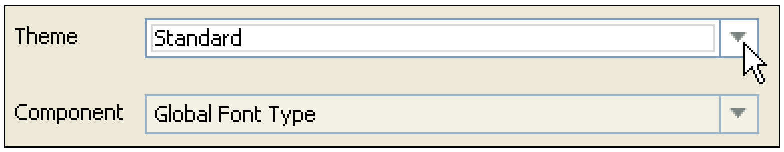


Figure 30 Theme Selection

2) Click on **Apply** at the bottom right of the *Options/Theme* dialog box. The settings of the selected theme take effect.

3) You may create a new theme file by clicking on **Save As** at the bottom of the *Options/Theme* dialog box. This brings up a new dialog box prompting you to enter a name for your new theme file.

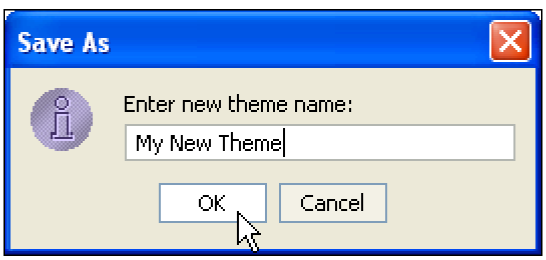


Figure 31 Theme – Save As

4) After entering the name, click **OK.** The theme file is saved.

5) If you would like to apply this new theme file as your default, select it as explained above.

2.2.12 Theme Component Modification

Color Components

To make a change to any component, click **Change** and make your new selection. When you click Change to change a color component, a dialog box is displayed allowing you to select a color. The only exception to this is the Title Bar Icon Color component, for which only two alternatives are available; black and white.

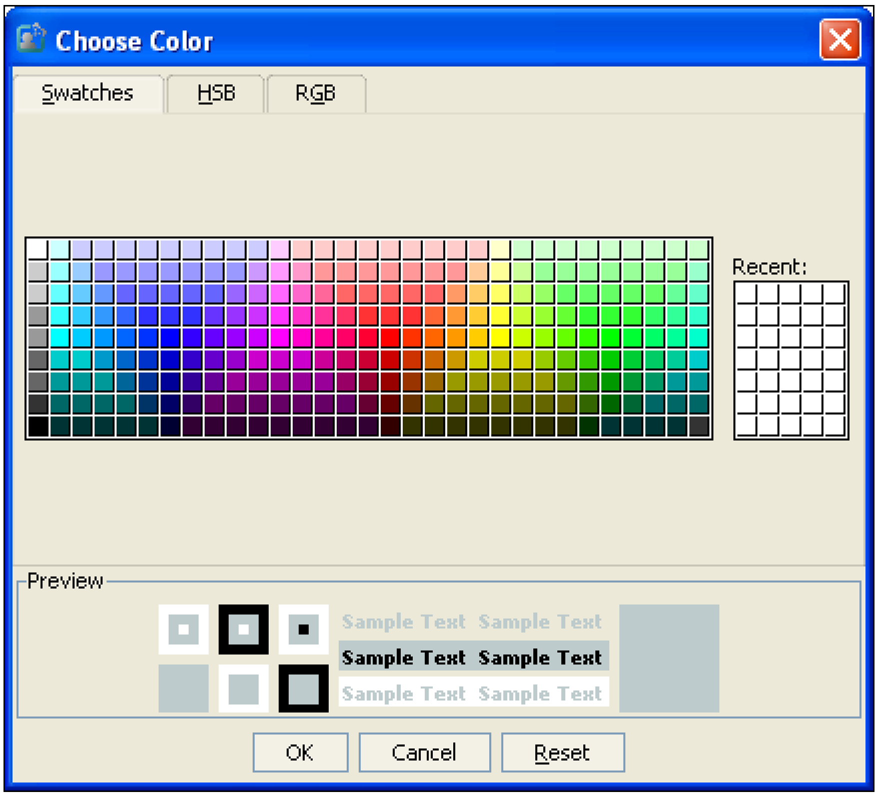


Figure 32 Theme Color Chooser

There are three color choice tabs available. The *Swatches* tab allows you to pick a particular color, *HSB* allows you to change the depth of that color, and *RGB* allows you to further alter that color by changing the percentage of red, green, and blue shades.

Image/Graphic Components

1) Click **Change** to change an image component. A dialog box is displayed allowing you to select an image/graphic file from your computer.

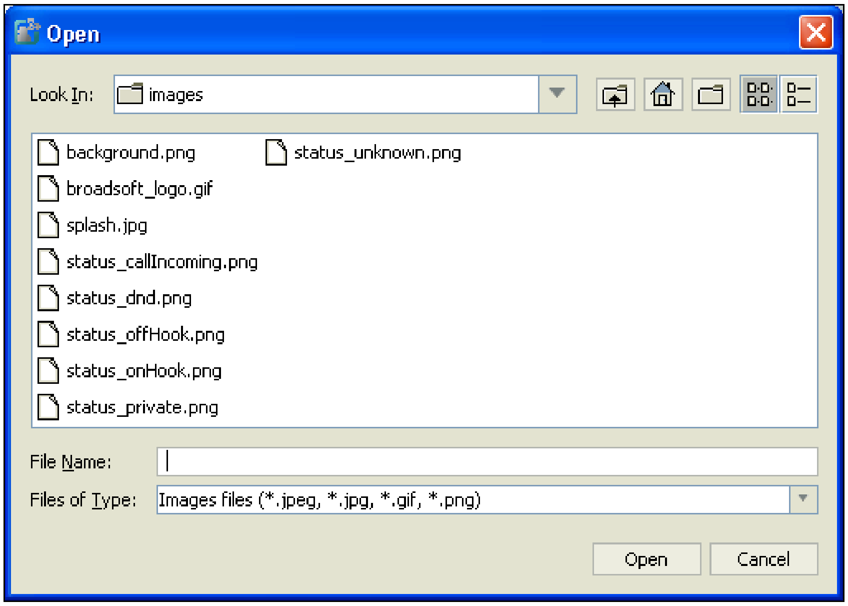


Figure 33 Theme File Chooser

2) Select a file that you want and click **Open**. The selected image file replaces the component image being changed.

2.2.13 Updates Tab

Click on the *Updates* tab to configure the proxy information required to connect to a proxy server.

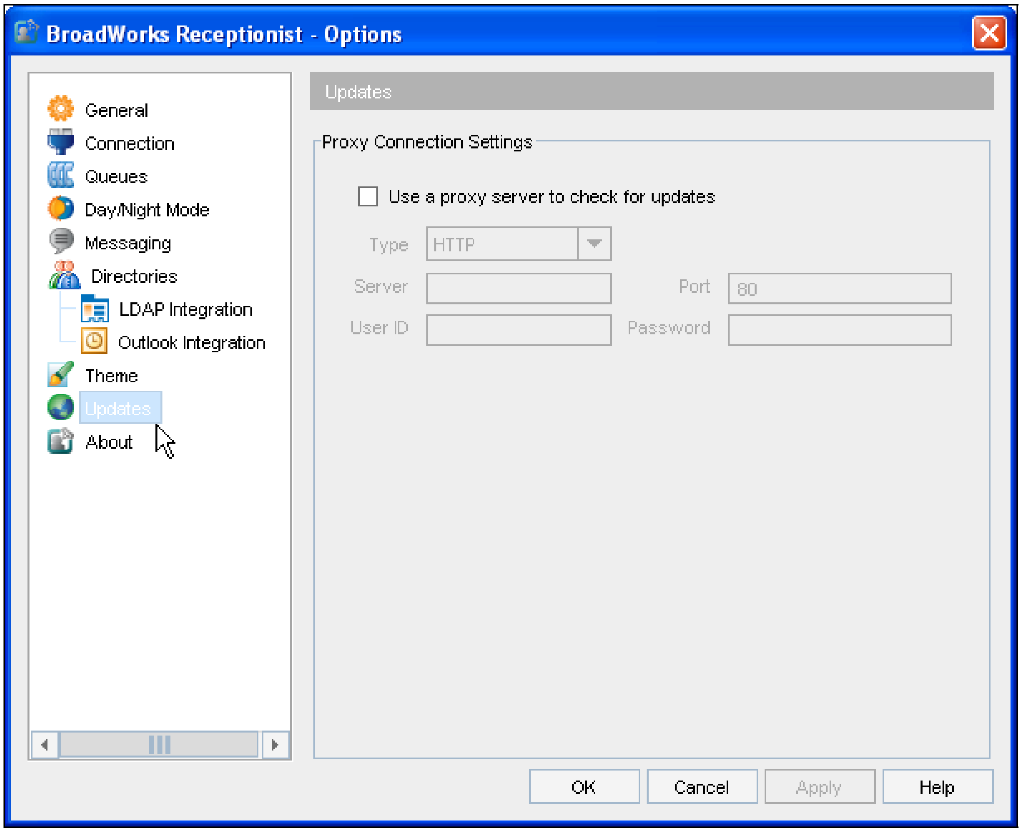


Figure 34 Options – Updates

The *Proxy Connection Settings* options are as follows:

- *Use a proxy server to check for updates* check box ensures that updates are checked by a proxy server automatically.
- *Type* is the compulsory proxy server type. HTTP is the accepted form.
- *Server* is the compulsory proxy server URL and can be obtained from the network administrator.
- *Port* is the proxy server connection port number. It is compulsory and can be obtained from the network administrator.
- *User ID* is the authentication user ID that is required if user authentication is required by the proxy server.
- *Password* is the authentication password that is required if user authentication is required by the proxy server.

2.2.14 About Tab

Click on the *About* tab to find version information and read the general disclaimer for Receptionist.

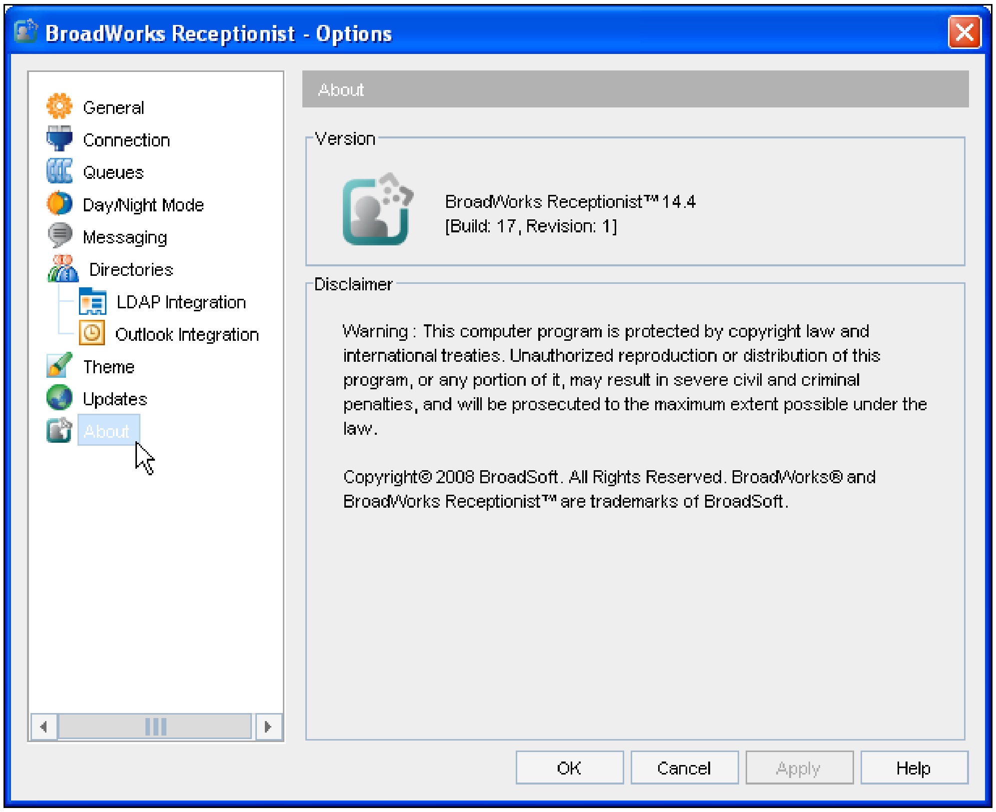


Figure 35 Options – About

The information displayed is as follows:

- BroadWorks Receptionist Version
- BroadWorks Receptionist Disclaimer

The *About* tab is important in providing information for the purpose of technical support.

2.3 Call History

The *Call History* dialog box is used to view and delete the user's call logs. The dialog box can be displayed from the Tools menu by selecting *Tools – Call History*. It is available from the main interface pages.

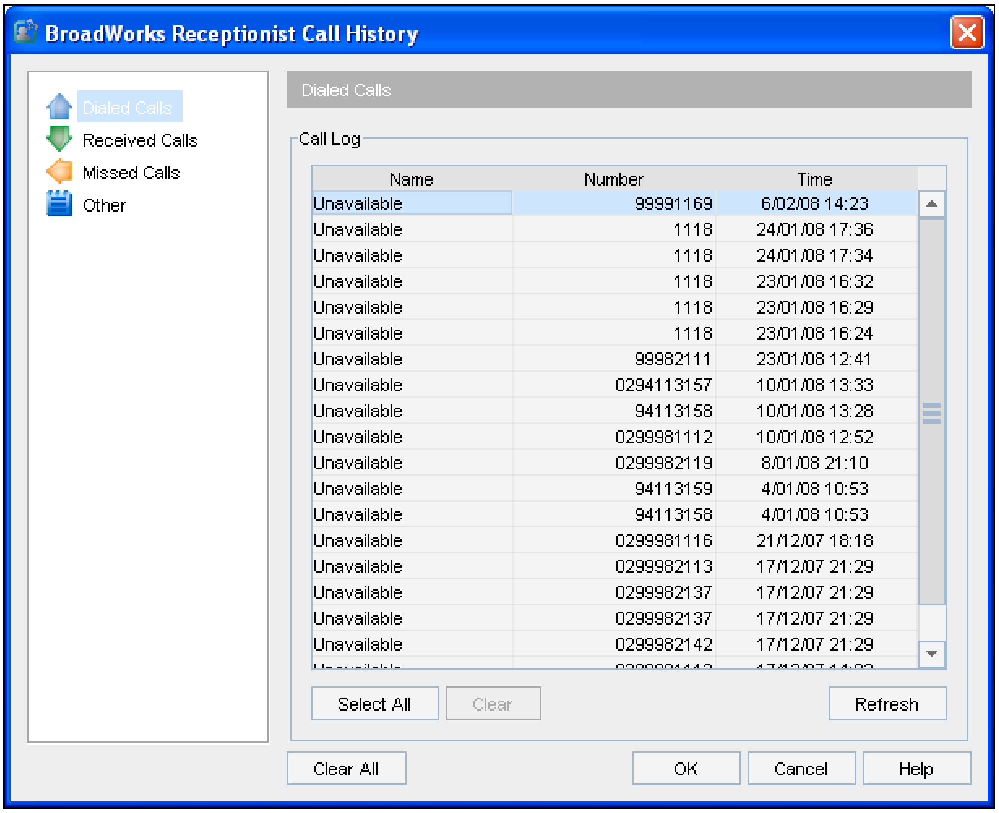


Figure 36 Call History Dialog

The dialog box displays the categories shown in the following sub-sections.

2.3.1 Dialed Calls Tab

To see dialed calls, click the *Dialed Calls* tab.

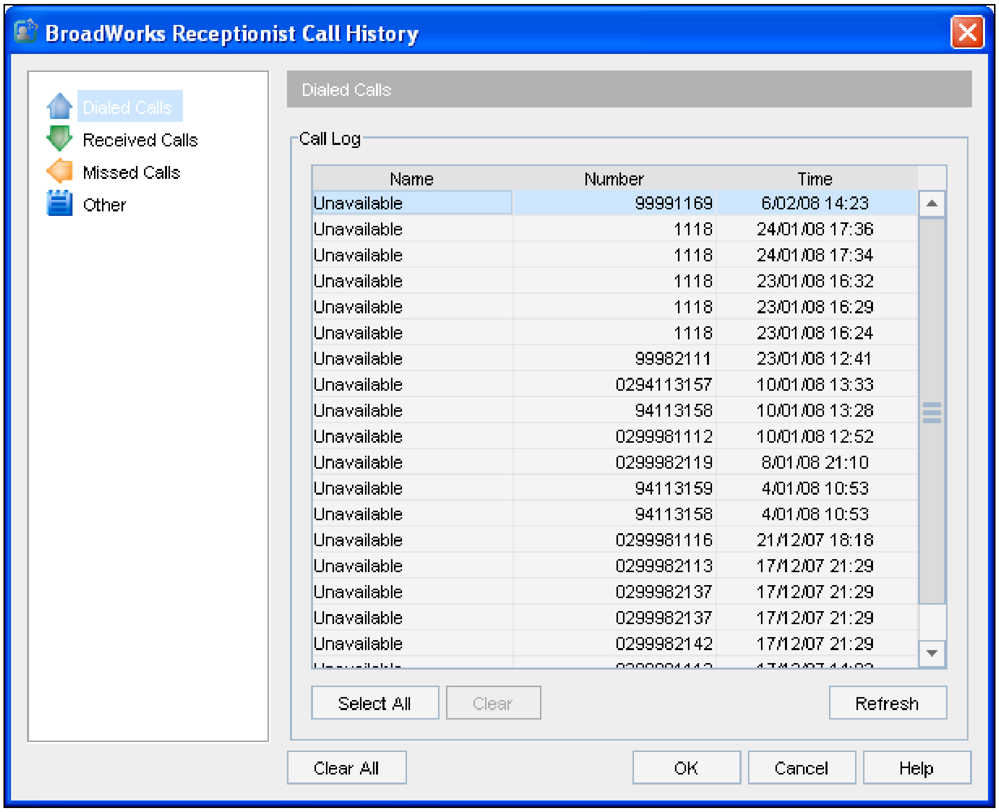


Figure 37 Call History – Dialed Calls

The record contains the following information:

- *Name* is the name of the call recipient for internal numbers (where available from the company directory). It could also be the number of the call recipient for external numbers or for internal numbers when no name is available.
- *Number* is the number of the call recipient.
- *Time* is the time of the call.

2.3.2 Received Calls Tab

To see received calls, click the *Received Calls* tab.

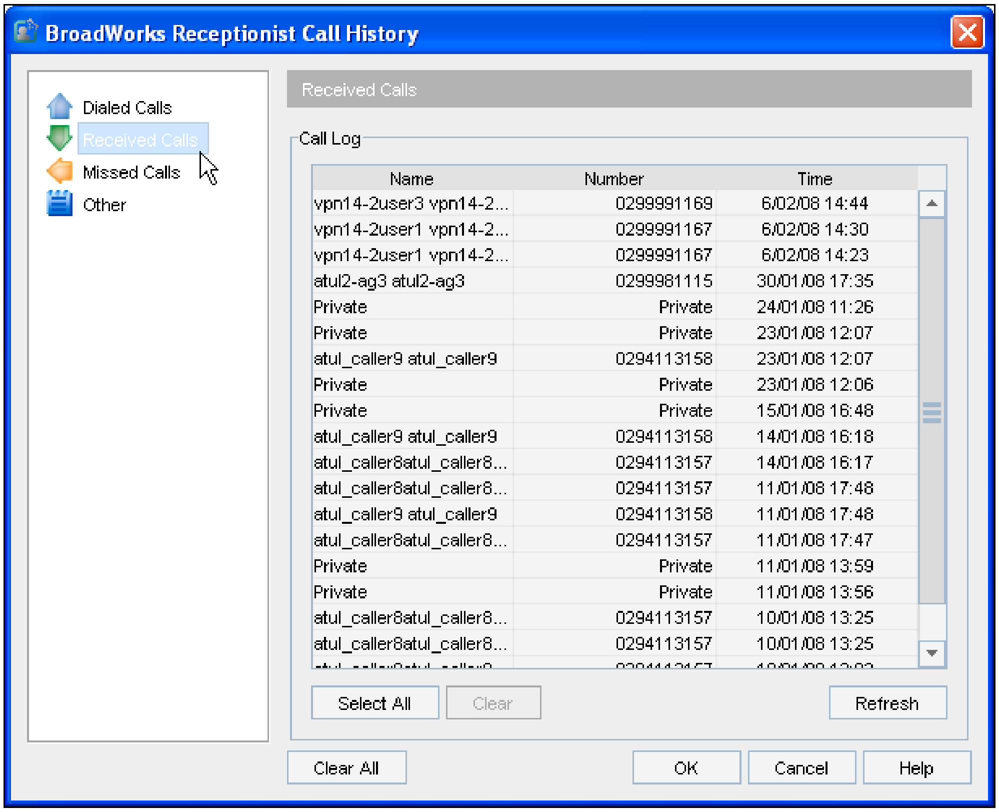


Figure 38 Call History – Received Calls

The records contain the following information:

- *Name* is the name of the caller for internal numbers (where available from the company directory). It could also be the number of the caller for external numbers, or for internal numbers when no name is available.
- *Number* is the number of the caller.
- *Time* is the time of the call.

2.3.3 Missed Calls Tab

To see missed calls, click on the *Missed Calls* tab.

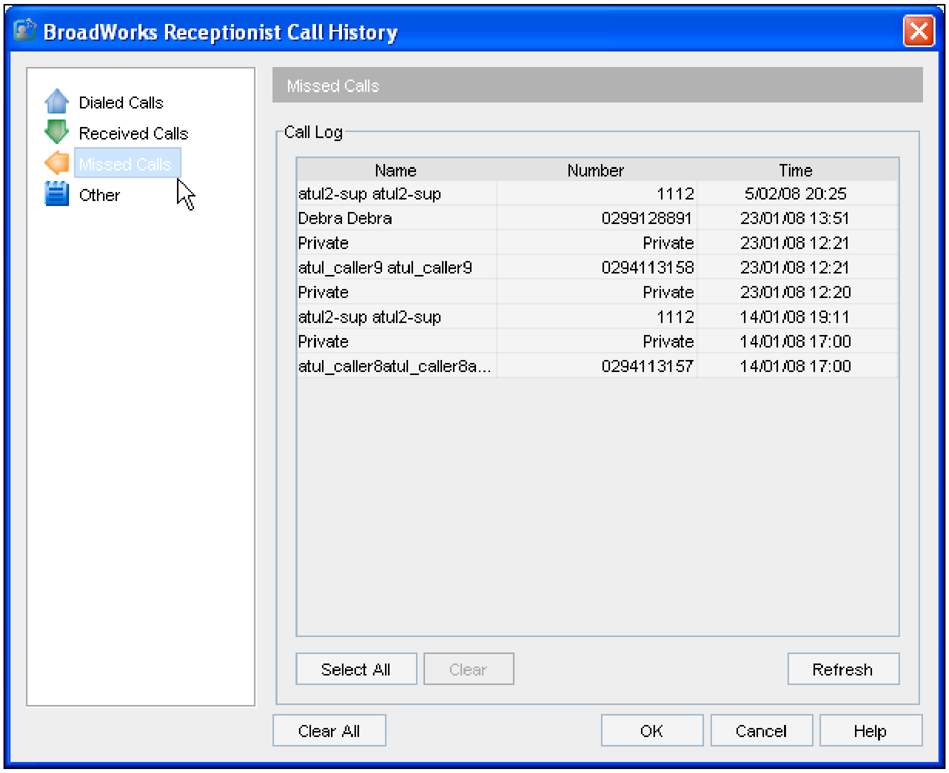


Figure 39 Call History – Missed Calls

The record contains the following information:

- *Name* is the name of the caller for internal numbers (where available from the company director). It could also be the number of the caller for external numbers or for internal numbers when no name is available.
- *Number* is the number of the caller.
- *Time* is the time of the call.

2.3.4 Other Tab

Click the *Other* tab to view your average hold time and the number of times you have transferred a call. Click **Refresh** to update the statistics.

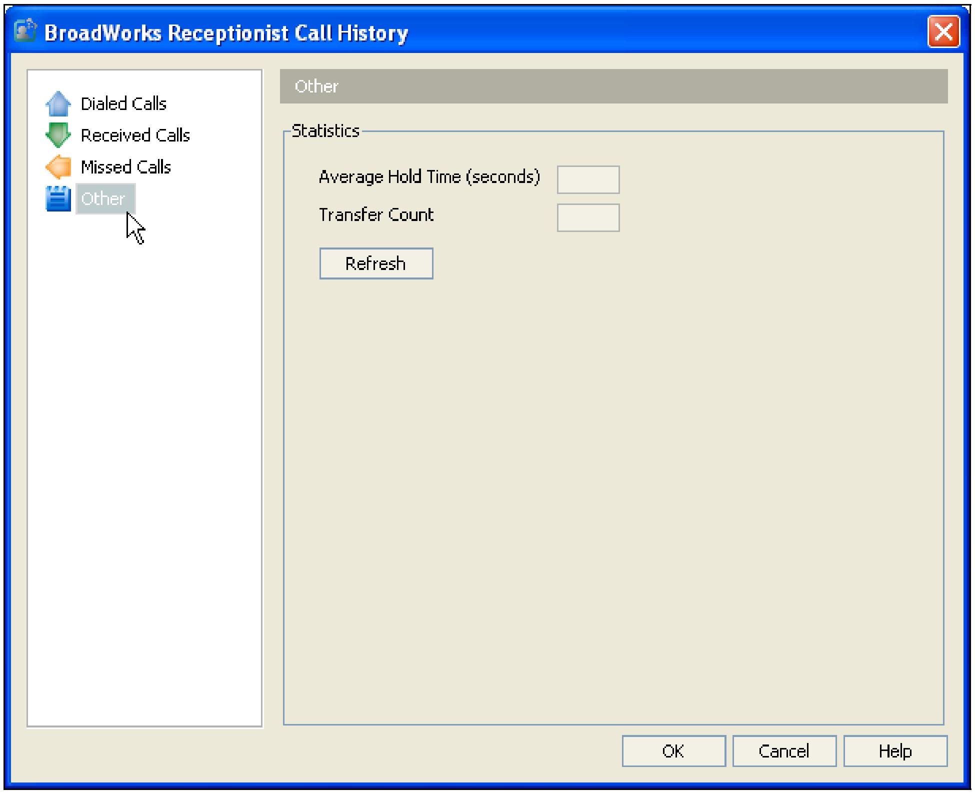


Figure 40 Call History – Other

2.3.5 Delete Call History Logs

You can delete one entry, multiple entries, or all entries in the *Call History* tab. To delete the call logs, do the following:

1) Select the call entry by clicking on it with the mouse or holding down TAB and using the arrow keys. For selecting consecutive entries, hold down SHIFT while selecting the calls. If you want to select multiple calls that are not together, hold down CTRL and select the desired calls. To select all the calls in the open dialog, whether that includes the dialed, received, or missed calls, click the **Select All** button.

Figure 41 Select All Button

Alternatively, if you wish to delete all of the call history entries, click the **Clear All** button.

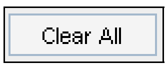


Figure 42 Clear All Button

2) A warning message asks for your confirmation. Select **Yes**.

Figure 43 Call History Confirmation Message

The entries are now cleared.

NOTE: This functionality is only available if you have been assigned this service by your group/system administrator. If you do not have sufficient permission to perform this action, a service error message informs you of this.

2.4 Managing Calls

You manage calls using a combination of the panels in a top to bottom work flow style. You should be able to distribute calls typically using this work flow for most of the activities in the following sub-sections.

2.4.1 Dial Contact

To make a call to a contact:

1) Find the contact you wish to call by searching the Contact Directory. For more information, see section *2.13.5 Search Directory*.

2) Select the contact by clicking on the contact in your directory.

Figure 44 Contact Directory Panel

3) Select the option you wish to use for this contact. These are found on the Options panel and include the extension, mobile, or voice mail. In most cases, an option (usually the contact's extension) is selected by default. To change the selected option, simply click on another option once. Unavailable options are dull in appearance.

4) To dial the contact, click the **DIAL** button on the Control panel. Alternatively, click **Actions** on the Menu panel, and select *Dial* from the drop-down list.

Figure 45 Dial Button

NOTE: The contact's extension is dialed in preference to the number field when both are populated. If there is no extension field provided, Receptionist attempts to dial using the number field.

5) The called party phone rings and the call appear on the Switchboard panel as "Ringing (Out)". When the call is answered by the destination number, the call is connected and you talk to the contact at that number.

NOTE: Alternatively, you can double-click a contact to dial the contact's default call option (automatically selects extension, mobile, voice mail, in order of availability).

2.4.2 Dial Ad Hoc Number

To make a call to an ad hoc number (a person not listed in your Contact Directory):

1) Select *other* from the Options panel. The dial pad appears.

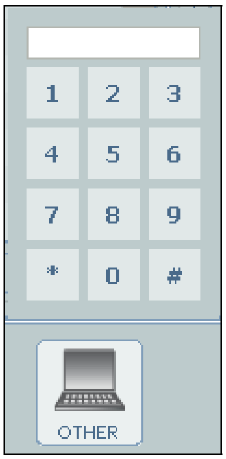


Figure 46 Other Button

2) Enter the number you wish to call either by typing the number on the keyboard or by selecting each number in turn from the dial pad using your mouse.

3) Click the **DIAL** button on the Control panel. Alternatively, click **Actions** on the Menu panel, and select *Dial* from the drop-down list.

Figure 47 Dial Button

The called part phone rings and the call appear on the Switchboard panel as "Ringing Out". When the call is answered by the destination number, the call is connected and you talk to the contact at that number.

2.4.3 Dial Speed Dial

Speed Dial is only available in Receptionist Enterprise and Receptionist Small Business.

To make a call via Speed Dial, perform the following steps:

1) Select the speed dial grid from the Contact Directory section of Receptionist. This displays the Speed Dial Directory.

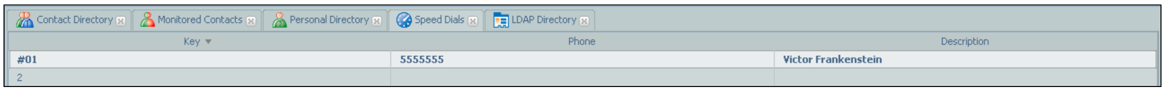


Figure 48 Speed Dial Directory

2) Select the Speed Dial number you want to use from the list.

3) Click the **DIAL** button on the Control panel. Alternatively, click **Actions** on the Menu panel, and select *Dial* from the drop-down list.

Figure 49 Dial Button

The called party phone rings and the call appears on the Switchboard panel as "Ringing (Out)". When the call is answered by the destination number, the call is connected and you talk to the contact at that number.

NOTE: Double-click the Speed Dial entry to make a call to the saved number. For more information, see section *2.13.8 Add Speed Dial Entry*.

2.5 Answer Call

NOTE: You must have a phone from the supported phone's list; otherwise, undesirable behavior may occur. For further information, contact your service provider.

To answer a call:

1) Select the call you wish to answer from the Switchboard panel.

Figure 50 Linked Switchboard

2) Click **Answer** on the Control panel. Alternatively, click **Actions** on the Menu panel, and select *Answer* from the drop-down list.

Figure 51 Answer Button

NOTE: You can answer the longest waiting incoming call by clicking the space bar key. Consecutive presses of the space bar place the previous active call on hold and answer the oldest incoming call. This does not work if you are clicking on a text field.

2.5.1 Hold Call

To place a call on hold:

1) Select the call you wish to end from the Switchboard panel.

Link	Line	Call To	Extn	Call From	Status	Time
	1		1021	Mary Shelley	Incoming	00:53
	2			Guy Fawkes	Incoming	00:05

Figure 52 Linked Switchboard

2) Click **Hold** on the Control panel to hold the call. Alternatively, click **Actions** on the Menu panel, and select *Hold* from the drop-down list.

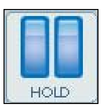


Figure 53 Hold Button

2.5.2 Unhold Call

To take a call off hold:

1) Select the call you wish to remove from being on hold from the Switchboard panel.

Link	Line	Call To	Extn	Call From	Status	Time
	1		1021	Mary Shelley	Incoming	00:53
	2			Guy Fawkes	Incoming	00:05

Figure 54 Linked Switchboard View

2) Click **UNHOLD** on the Control panel. Alternatively, click **Actions** on the Menu panel, and select *Unhold* from the drop-down list.

Figure 55 Unhold Button

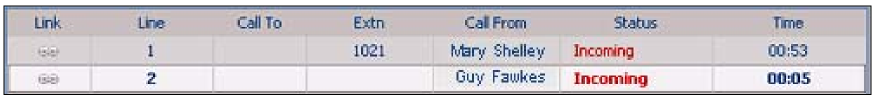
The call becomes active and the call status on the switchboard panel changes from "On Hold" to "Active".

NOTE: Alternatively, double-click on the held call on the switchboard panel.

2.6 End Call

To end a call:

1) Select the call you wish to end from the Switchboard panel.



Link	Line	Call To	Extn	Call From	Status	Time
	1		1021	Mary Shelley	Incoming	00:53
	2			Guy Fawkes	Incoming	00:05

Figure 56 Linked Switchboard

2) Disconnect the calling party by clicking **End** on the Control panel. Alternatively, click **Actions** on the Menu panel, and select *End* from the drop-down list.

Figure 57 End Button

The calling party is disconnected when the **End** button is clicked.

2.7 Transfer Call

There are a number of ways in which you can transfer a call to another contact.

2.7.1 Blind Transfer Call

A blind transfer occurs when a call is transferred without an introduction. Calls may be blind transferred while active, held, or ringing (in) on your phone. If a call is ringing (in), the blind transfer activity allows the call to be redirected before it is answered. This can be done via "drag and drop" or through the control panel.

To conduct a blind transfer using drag and drop:

1) Click the call you wish to transfer from the Switchboard panel with your left mouse button. Your cursor changes to a hand grip to indicate the call is moveable.

Figure 58 Hand Grip Cursor

2) To scroll up or down a list, move the cursor over the corresponding corner of the contact directory. To cancel the move at any time, press **Esc**.

3) Drag the call to the target contact in your Contact Directory or Customized Directory, and let go of the left mouse button. The call is now transferred. If the target contact is busy, the call is camped.

To conduct a blind transfer:

1) Select the call you wish to transfer from the Switchboard panel.

2) Select the option to which you wish to blind transfer the call. This number may be the option for a contact from the Contact Directory, a speed dial, or another number of your choice using the Other dial pad.

3) Click **Blind Transfer** highlighted on the Control panel. If the Blind Transfer button is not highlighted, click **Actions** on the Menu panel, and then select *Blind Transfer*.

Figure 59 Blind Transfer Button

The call is now transferred and then removed from the Switchboard panel.

2.7.2 Supervised Transfer of Call

When you have an active inbound call that you wish to transfer to another contact, do the following:

1) Make sure that the first call is answered and active.

2) Dial the number you wish to transfer over to. For more information, see the directions in section *2.4 Managing Calls*. The first call is automatically held.

3) The last incoming call and dialed call are automatically linked on the switchboard panel.

4) Click on the **Blind Transfer** button on the Control panel to blind transfer. If the Blind Transfer button is not highlighted, click **Actions** on the Menu panel, and then select *Blind Transfer*.

Figure 60 Blind Transfer Button

NOTE: If the dialed contact is busy, you can re-try or dial another contact. The call is transferred to the first available dialed contact.

2.7.3 Conduct Consulted Transfer

A consulted transfer allows the operator to announce or introduce the call to the called party. A call may be consult-transferred while active, held, or ringing (out).

To conduct a consulted transfer:

1) Link the two calls to be transferred together by clicking in the *Link* Column on the switchboard panel. You must do this for both calls, thereby identifying the calls being linked.

Link	Line	Call To	Extn	Call From	Status	Time
	1			Mary Shelley	On Hold (00:21)	07:42
	2	Guy Fawkes			Outgoing	00:08

Figure 61 Linked Switchboard

2) To transfer the calls, click **CONSULTED TRANSFER** highlighted on the Control panel. Alternatively, click **Actions** on the Menu panel, and select *Consulted Transfer* from the drop-down list.

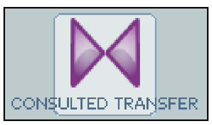


Figure 62 Consulted Transfer Button

The calls are now transferred and removed from the Switchboard panel.

NOTE: If you have an active call and place another call, these two callers are automatically linked on the switchboard panel.

2.7.4 Transfer to Voice Mail

To transfer a call to Voice Mail:

1) Select the call you wish to end from the Switchboard panel.

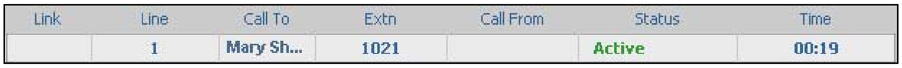


Figure 63 Switchboard

2) Select the call option by clicking **VOICEMAIL** on the Options panel.

3) Transfer the call to Voice Mail by clicking **VOICEMAIL TRANSFER** on the Control panel. Alternatively, click **Actions** on the Menu panel, and select *Voicemail Transfer* from the drop-down list.

Figure 64 Voice Mail Button

The calling party is transferred to your voice mail.

2.7.5 Transfer to Queue

To transfer to a queue:

1) Select the call from the switchboard. Click on the call to transfer on the switchboard panel.

Figure 65 Switchboard

2) Identify the target queue position. Click **QUEUE** on the Options panel. A pop-up menu appears. Select **Front of Queue** to move the call to the front of the queue or **Back of Queue** to move the call to the back of the queue.

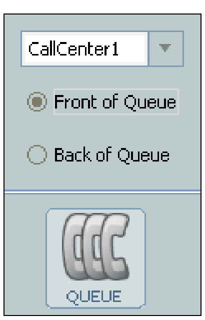


Figure 66 Queue Selection Button

3) To transfer the call, click **QUEUE TRANSFER** on the Control panel. Alternatively, click **Actions** on the Menu panel, and select *Queue Transfer* from the drop-down list.

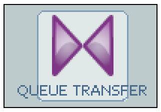


Figure 67 Queue Transfer Button

2.7.6 Busy Camp On

Busy Camp On can only work if the user has Camp On activated and the party the user wants to transfer to is busy. It allows the operator to hold and automatically transfer a call to a contact when the contact is available to take the call. Camping a call to a contact can only occur if the call is active or held, and if the destination contact status is either "On the Phone" or "Call Incoming". This can be done via drag and drop or using Control buttons. The Camp function is only available in Receptionist Enterprise and Receptionist Small Business.

NOTE: Busy Camp On is provisioned through the BroadWorks Web Portal.

2.7.6.1 Application Managed Mode

This mode ensures the call stays on the user's line. Thus, the user has the option of un-holding a camped call. To find out which mode you have, contact your group/system administrator.

To camp a call using drag and drop:

1) Click the call you wish to transfer from the Switchboard panel with your left mouse button. Your cursor changes to a hand grip to indicate the call is moveable.

2) To cancel the move at any time, press **Esc**.

3) Drag the call to the target busy contact in your Contact Directory or Customized Directory and let go of the left mouse button. The call is now camped at the contact's extension and shows Camped status against the call on the Switchboard panel. The calling party is muted while camped and hears the Music on Hold. Once the contact is ready to take the call (contact status becomes "Online"), the call is automatically transferred and is removed from the Switchboard panel.

To camp a call:

1) Select the call that you wish to camp on the Switchboard panel.

2) Open a directory in the Contact Directory panel and click a contact name that you wish to camp.

Figure 68 Switchboard View

3) Click **EXTN** on the Options panel.

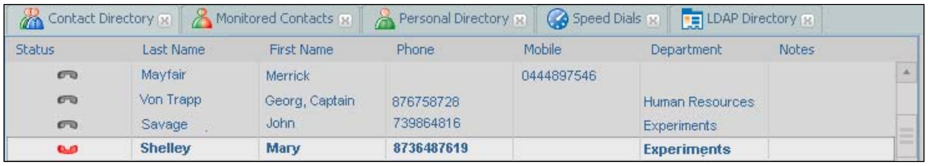


Figure 69 Directory Panel

4) Click **CAMP ON** highlighted on the Control panel. Alternatively, click **Actions** on the Menu panel, and select *Camp-On* from the drop-down list.

Figure 70 Camp On Button

The call is now camped at the contact's extension and shows Camped status against the call on the Switchboard panel. The calling party is muted while camped and hears the Music on Hold. Once the contact is ready to take the call (contact status becomes "Online"), the call is automatically transferred and is removed from the Switchboard panel.

5) If you wish to uncamp the call, select it on the switchboard panel, if you have not done this. Click **UNCAMP**, which should be highlighted on the Control panel. Alternatively, click **Actions** on the Menu panel, and select *Uncamp* from the drop-down list.

Figure 71 Uncamp Button

The call is now uncamped from the destination contact and shows "On Hold" status on the switchboard panel. This is useful if, for any reason, you want to retrieve a call from being camped.

2.7.6.2 Service Managed Mode

This mode ensures that the BroadWorks service manages the camped call. This functionality is only available if you have been assigned this service by your group/system administrator.

To transfer a call to a busy user:

1) Select the call from the Switchboard.

Figure 72 Switchboard View

2) Select a busy contact from the Contact Directory.

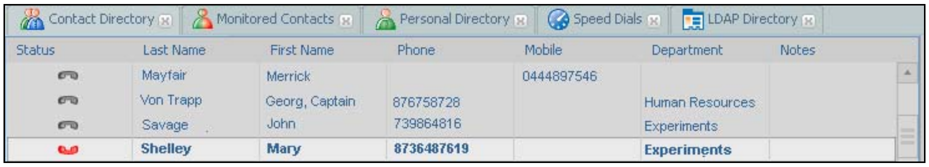


Figure 73 Directory Panel

3) Click the **Camp On** button. Alternatively, click **Actions** on the Menu panel, and select *Camp-On* from the drop-down list. The call is held on your device and displays the Camped status in the Switchboard.

Figure 74 Camp On Button

The call is transferred after the receiving party becomes available and they are alerted.

If the camped call reaches the designated expiration timer, the call is recalled to the original user and flagged in the Switchboard as Recalled.

2.8 Conduct Group Call Park

Group Call Park, when selected, searches within a pre-defined hunt group for an available line to park a call. After a designated time, the call returns to the originating operator. If the parking attempt fails for any reason, the call remains on the Switchboard. This is only available in Receptionist Enterprise.

To perform a Group Call Park:

1) Select an active or held call from the Switchboard.

2) Click the **Group Call Park** button. Alternatively, click **Actions**. Then select *Group Call Park* from the drop-down list.

Figure 75 Group Call Park Button

3) The parked line shows the following information:

- *Line No:* The Line Number is dependent on the other calls on the Switchboard.
- *Call To*: Empty, unless the call was previously diverted.
- *Call From:* Is the name and number of the original calling party.
- *Status*: Parked. In brackets, is the parked extension.
- *Time*: Is displayed in minutes and seconds (mm:ss).

If designated, there is a parked announcement.

4) The call is released after the display time expires or the parked announcement has finished and the call is now parked.

2.9 Conduct Directed Call Pickup

Directed Call Pickup allows the operator to pick up a call that is incoming on a contact. This is useful for when you want to answer a call on the contact's behalf, or if the contact is currently not on hand to answer the call. This functionality is only available if you have been assigned this service by your group/system administrator.

To conduct a directed call pickup:

1) Select a contact who you wish to pick up the call for. The contact's status must be "Ringing".

2) Click **CALL PICKUP** highlighted on the Control panel. Alternatively, click **Actions** on the Menu panel, and select *Call Pick-Up* from the drop-down list.

3) You answer the call on the contact's behalf and the Switchboard panel shows a new "Active" line representing this call.

2.10 Conduct Operator Call Barge-In

Operator Call Barge-In allows the operator to barge in on a contact's call. This is useful for when you want to enter an already established call between two other people. This functionality is only available if you have been assigned this service by your group/system administrator.

To conduct a call barge-in:

1) Select a contact who you wish to barge in on. The contact's status must be "On the Phone".

Link	Line	Call To	Extn	Call From	Status	Time
	1			Shelley, Mary	On Hold (00:20)	06:03
	2	Fawkes, G			Active	00:42

Figure 76 Linked Switchboard Panel

2) Click **CALL BARGE-IN** highlighted on the Control panel. Alternatively, click **Actions** on the Menu panel, and select *Call Barge-In* from the drop-down list.

Figure 77 Call Barge-In Button

You enter the contact's call that has already been established, thereby establishing a Three-Way Conference. The Switchboard panel shows that you are in a conference with two other calls.

2.11 Conference Calls

Click **Conference** so you are allowed to participate in Three-Way Conference calls. The button is dull in appearance when this action is not an option. Alternatively, click **Actions** on the Menu panel, and select *Conference* from the drop-down list.

Figure 78 Conference Button

2.11.1 Start Conference Call

To start a conference:

1) Select the calls. Choose both parties with whom you wish to conduct a conference from the Switchboard panel.

2) Link the two calls by clicking on both their “LINK” entries. One chain link should appear in each respective entry.

Link	Line	Call To	Extn	Call From	Status	Time
	1			Shelley, Mary	On Hold (00:20)	06:03
	2	Fawkes, G			Active	00:42

Figure 79 Linked Switchboard Panel

The CONFERENCE button should light up.

3) Click on the **CONFERENCE** button to begin the conference. Alternatively, click **Actions** on the Menu panel, and select *Conference* from the drop-down list.

Figure 80 Conference Button

Both calls become “Active”.

2.11.2 Hold Conference Call

To hold an active conference:

Click **HOLD CONFERENCE** on the Control panel. Alternatively, click **Actions** on the Menu panel, and select *Hold Conference* from the drop-down list.

Figure 81 Hold Conference Button

Link	Line	Call To	Extn	Call From	Status	Time
	2		333	Mary Shelley	Active	04:45
	2			Guy Fawkes	Active	03:31

Figure 82 Held Conference Switchboard Panel

The conference link icon changes when this button is pressed. The conference is held.

Link	Line	Call To	Extn	Call From	Status	Time
	2		333	Mary Shelley	Active	09:49
	2			Guy Fawkes	Active	08:35

Figure 83 Active Conference Switchboard Panel

2.11.3 Unhold Conference Call

To re-activate a held conference:

When a conference is held, the call status for the parties involved shows “On Hold”.

Figure 84 Unhold Conference Button

Click **UNHOLD CONFERENCE** on the Control panel. Alternatively, click **Actions** on the Menu panel, and select *Unhold Conference* from the drop-down list. Both call states change to “Active” when the action is complete.

Link	Line	Call To	Extn	Call From	Status	Time
	2		333	Mary Shelley	Active	09:49
	2			Guy Fawkes	Active	08:35

Figure 85 Active Conference Switchboard Panel

2.11.4 Leave Conference Call

To exit from a conference, click **LEAVE CONFERENCE** on the Control panel. Alternatively, click **Actions** on the Menu panel, and select *Leave Conference* from the drop-down list.

Figure 86 Leave Conference button

This removes the user from the conference call, although the two other parties involved in the conference call are still connected. The two parties are removed from the Switchboard panel.

2.11.5 End Conference Call

To end a conference call, click **END CONFERENCE** on the Control panel. Alternatively, click **Actions** on the Menu panel, and select *End Conference* from the drop-down list.

Figure 87 End Conference Button

The calls are removed from the switchboard and terminated.

2.12 Managing Queues

You manage queues using a combination of the panels in a top to bottom work flow style. To manage the queues you are assigned to perform the tasks in the following sub-sections.

2.12.1 Change your Join Status

To change your status to Joined:

From the *Joined* drop-down list, select *Joined*. Your status is now available to receive calls from the queues configured in the *Options – Queues* dialog box. You start to receive calls.

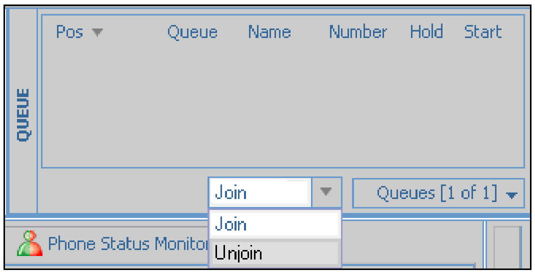


Figure 88 Queue – Join Drop-down List

To change your status to Unjoined:

From the *Joined* drop-down list, select *Unjoin*. Your status is now unavailable to receive calls from the queues configured in the *Options – Queues* dialog box. You no longer receive calls.

2.12.2 View Queue Panel

Managing and joining queues allows you to monitor the queues.

To view the queue panel:

Display the Queue panel by clicking *Queue* from the View menu.

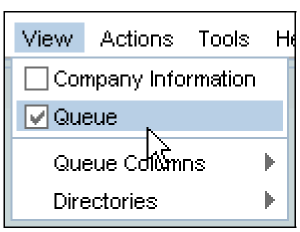


Figure 89 View Menu – Queue Check Box

2.12.3 Display Calls in Queue Panel

You can monitor queues by displaying the calls for those queues in the *Queues* drop-down list.

To display queues:

Click on the Queue list and check each queue that you want to display as configured in the *Options – Queues* dialog box.

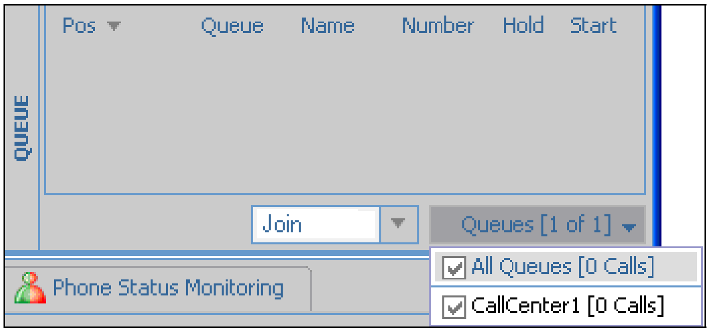


Figure 90 Queue – Checked Monitoring

NOTE: Check *All Queues* to display calls from all of the queues you have configured to monitor.

2.12.4 Filter Calls in Queue Panel

You cannot monitor queues by filtering the calls for those queues in the *Queues* drop-down list.

To filter out queues:

Click on the Queue list and uncheck the queue name to filter all calls related to the unchecked queues previously configured in the *Options - Queues* dialog box.

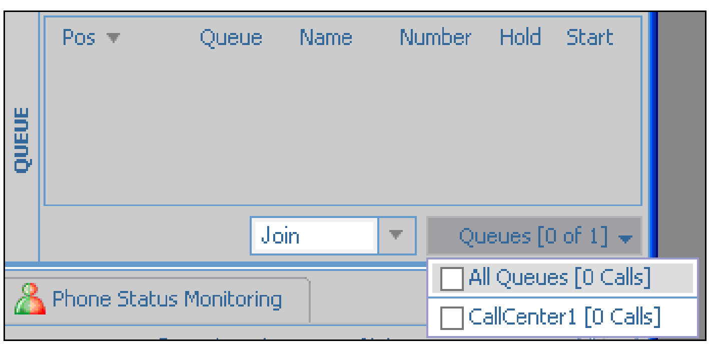


Figure 91 Queue – Unchecked Monitoring

2.12.5 Change Position of Calls in Queue

To change the position of a call in a Queue panel:

1) Select a call in the Queue panel by clicking on it.
2) Specify the new position by clicking the *POS* column corresponding to the selected call in the Queue panel. A drop-down list appears, containing the available positions for the call. Select a position from the list.
3) Click **Apply** to reposition the call. Click **Reset** instead to cancel your changes.

2.13 Using Directory

The Contact Directory panel in Receptionist allows you to view, search, and edit a variety of different types of directories.

The *Status* column of the Contact Directory and any custom contact directory shows the contact's phone on/off hook state. The color of the state is customizable through the *Tools – Options – Themes* dialog box. The following colors represent the different automated states:

Status	Icon	Description
Green Handset Down		Contact phone is on-hook (available to receive a call) *(previously this was a green triangle).*
Red Handset Up		Contact phone is off-hook (on a call, busy) *(previously this was a red triangle).*
Orange Handset Down		Contact phone is ringing *(previously this was a blue triangle).*
Do Not Disturb		Contact phone has status set to DND *(previously this was an orange triangle).*
Grey Handset Down		Contact phone state is currently unavailable or unknown *(previously there was no triangle or it was blank).*
Private		Contact phone state is set to "private".
Call Forward Always		Contact has the Call Forward Always service turned on. By hovering your mouse over the contact, the user can see the phone number the contact has set the Call Forward to.

2.13.1 View Directory

To view a directory, click **View** in the Menu panel.

From the *Directories* drop-down list, check the directory you want visible. This includes custom contact directories.

2.13.2 Hide Directory

To hide a directory, click **View** in the Menu panel.

From the *Directories* drop-down list, uncheck the directory you want invisible.

Alternatively, click the **x** on the *Directory* tab.

2.13.3 Select Directory

Use the *Contact Directory* tab list to select the directory displayed in the Contact Directory panel.

Figure 92 Directory Heading Tabs

2.13.4 Order Columns (with Alphabetical Filter)

To order a directory by column:

1) Click the top of a column in the Contact Directory to arrange the contacts in ascending order for that column. Words are ordered alphabetically; numbers are ordered numerically.

2) Click the column again to arrange the contacts in descending order.

   Ascending

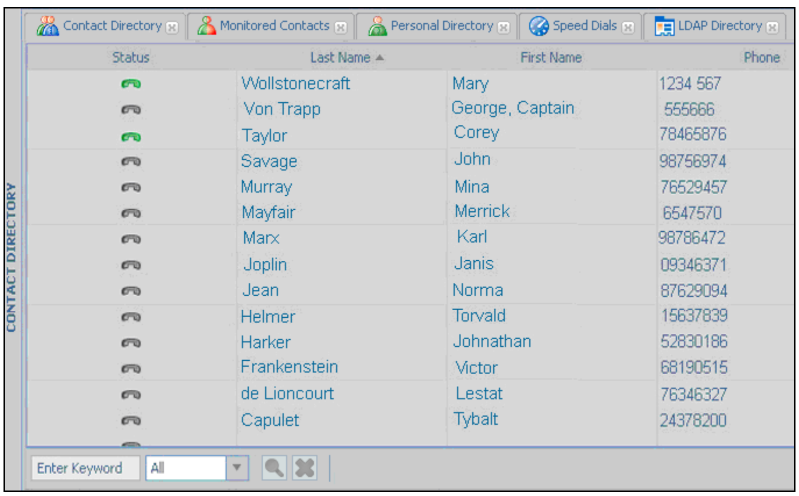


Figure 93 Contact Directory Panel – Sort Ascending

Descending

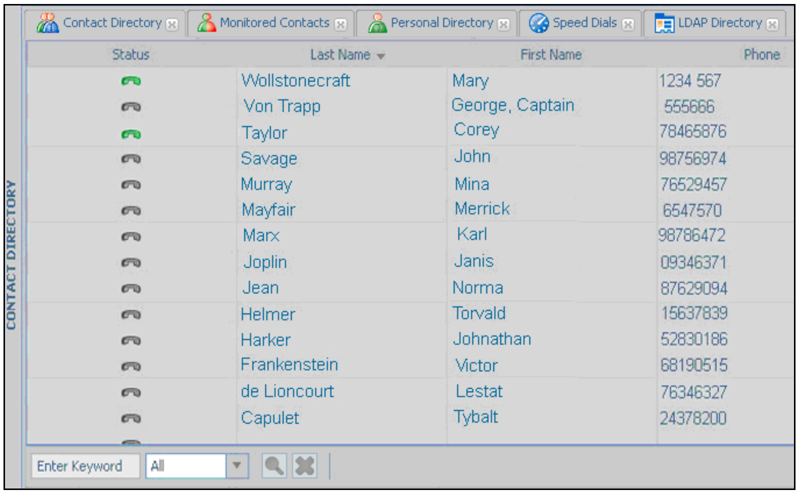


Figure 94 Contact Directory Panel – Sort Descending

To filter a directory alphabetically:

You can refine the search via the alphabet display, by pressing the starting letter of the contact's name (or title, or department in the case of sorting by those columns respectively). This is only available in Receptionist Enterprise.

For example, to display all contacts with a first name beginning with the letter "M", click **M** on the alphabetic index.

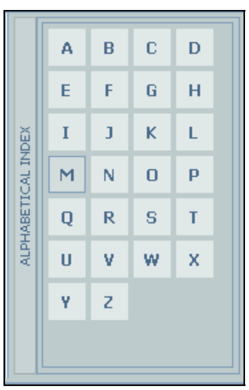


Figure 95 Alphabetical Index

2.13.5 Search Directory

The keyword search feature is located below the Contact Directory list area.

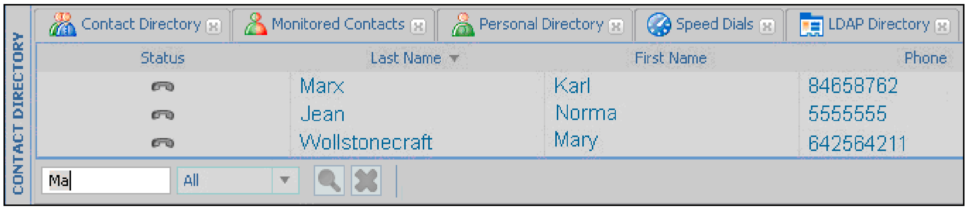


Figure 96 Search Directory

To conduct a keyword search:

1) Select the search by clicking inside the *Text Search* area of the Contact Directory.

2) Enter a keyword (or part of a keyword).

3) Select the directory from the *Contact Directory* drop-down list.

4) Select the search criteria filter from the *Keyword Search Filter* drop-down list section of the Contact Directory. Available criteria filters are All (default), Full Name – a combination of the first and last name, First Name, Last Name, Title, Department, Extension, Phone Number, and Notes.

5) Click **Search**. Receptionist returns filters to the contacts matching the search criteria in the Contact Directory. To return to the full directory, click **Reset**.

2.13.6 Create Custom Directory from Search Results

Use the custom search feature to create a custom directory from a set of search results. Once created, the custom directory is displayed in the *Contact Directory* drop-down list, and can be used until you click **CLOSE** in the Contact Directory panel while viewing the custom directory.

To create a custom search filter:

1) Select the type of search by clicking inside the *Text Search* area of the Contact Directory.

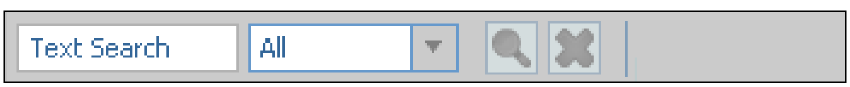


Figure 97 Contact Directory – Text Search Box

2) Enter a keyword (or part of a keyword).

3) Select a directory from the *Contact Directory* drop-down list.

4) Select the search criteria filter from the *Keyword Search Filter* drop list section of the Contact Directory. Available criteria filters are All (default), Full Name – a combination of the last and first name, Last Name, First Name, Title, Department, Extension, Phone Number, and Notes.

5) Press Ctrl and click **Search** or Enter.

The definition of this search is appended to the current directory in the Contact Directory drop-down list. For example, a search for the keyword “operations” within the Contact Directory would display the following:

Contact Directory: Operations

To perform a search within an existing custom directory:

1) Click inside the *Text Search* area of the Contact Directory.

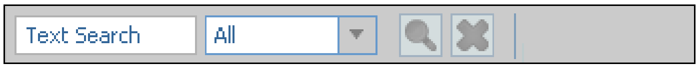


Figure 98 Contact Directory – Text Search Box

2) Enter a keyword (or part of a keyword).
3) Select the custom directory from the *Contact Directory* drop-down list.
4) Select the search criteria filter from the *Keyword Search Filter* drop-list section of the Contact Directory. Available criteria filters are All (default), Full Name – a combination of the last and first name, Last Name, First Name, Title, Department, Extension, Phone Number and Notes.
5) Click **Search**. The results of the search appear in the Contact Directory panel.

2.13.7 Edit Contact Notes

You can create and edit notes for user accounts in the Contact directory from the Contact Directory panel.

1) Select *Contact Directory* tab.

Figure 99 Edit Icon

2) Click the desired entry in the Contact Directory.

   Receptionist opens a new window in which you can edit and save notes for the selected user account.

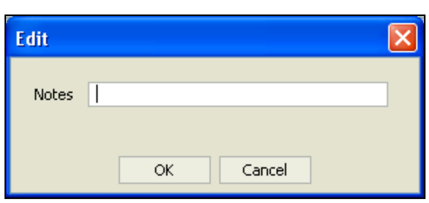


Figure 100 Edit Dialog Box

3) Edit the notes by changing the displayed value as desired.

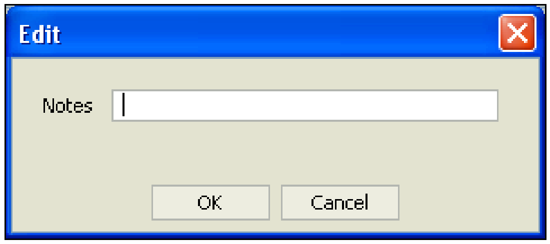


Figure 101 Edit Dialog Box

4) Save the entry by clicking **OK**. Click **Cancel** to exit without saving your changes.

Receptionist opens a new window in which you can edit and save notes for the selected user account.

2.13.8 Add Speed Dial Entry

The Speed Dial directory is only available in Receptionist Enterprise and Receptionist Small Business.

You can add a Speed Dial entry from the Contact Directory panel.

1) Select *Speed Dials Directory tab*.

2) Click on the **Add New Contact** button located on the bottom right-hand corner of the Contact Directory panel.

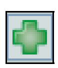


Figure 102 Add New Contact Button

An *Add* dialog box appears.

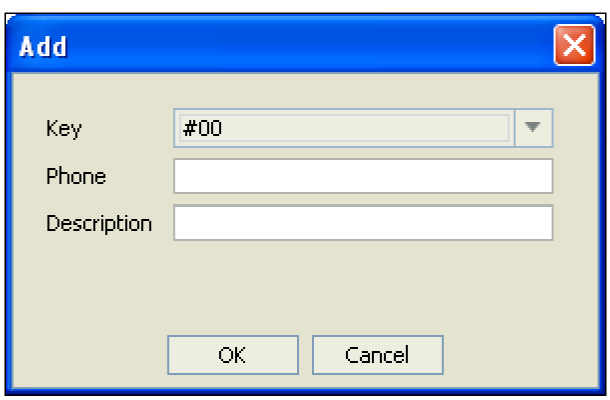


Figure 103 Add Speed Dial Dialog Box

3) Select a key value from the drop-down list. The key value determines what numbers you have to press on your phone to dial this Speed Dial entry.

4) Specify the phone number by entering the number in the *Phone* field.

5) Enter the description in the *Description* field.

6) Save the new Speed Dial entry by clicking **OK**. Click **Cancel** to exit without creating the new entry.

NOTE: Speed Dial 8 entries are created in Receptionist for you. These can only be edited. When you add a speed dial it is always in the Speed Dial 100 range.

2.13.9 Edit Speed Dial Entry

The Speed Dial directory is only available in Receptionist Enterprise and Receptionist Small Business.

You can edit an existing Speed Dial entry from the Contact Directory panel.

1) Select *Speed Dial Directory* tab.
2) Click the desired entry in the Contact Directory.
3) Click the **Edit** button at the bottom right-hand corner.

Figure 104 Edit Speed Dial Button

4) Receptionist opens a new window in which you can edit the notes saved for the selected user account.

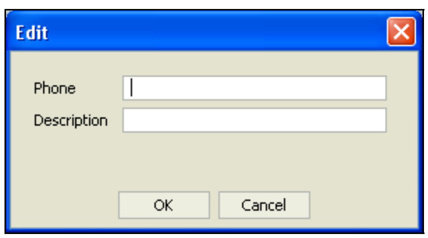


Figure 105 Edit Speed Dial 8

5) Change the displayed value as desired.
6) To save the entry, click **OK**. Click **Cancel** to exit without saving your changes.

2.13.10 Delete Speed Dial Entry

The Speed Dial directory is only available in Receptionist Enterprise and Receptionist Small Business.

You can delete an existing Speed Dial entry from the Contact Directory panel.

1) Select the *Speed Dial Directory* tab.
2) Click the desired entry in the Speed Dial Directory.
3) Click the **Delete** button located at the bottom right-hand corner of the Contact Directory panel.

   Receptionist opens a Delete dialog box that verifies your action.

4) Click **Yes** to ensure that Receptionist deletes the Speed Dial entry.

Figure 106 Delete Dialog Box

2.14 Keeping Notes

Receptionist incorporates two areas in which the operator can retain different types of notes. Company Notes and Company Profile is only available in Receptionist Enterprise.

2.14.1 Company Notes

Company Notes are located at the right-hand side of the Switchboard panel. To view the Company Notes, go to View menu, and then check *Company Information* on the drop-down list.

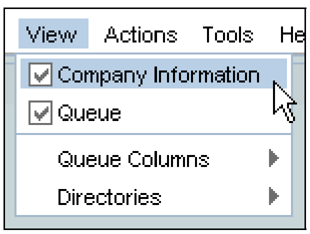


Figure 107 View Menu – Company Information

To modify content in the Company Notes area:

1) Open the Company Notes area by clicking the slider that contains the words **COMPANY NOTES**.

2) To add, edit, or delete content, click the text area and type to change content.

   The content is saved and is available when Receptionist is started the next time.

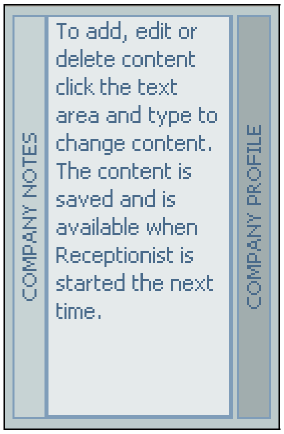


Figure 108 Company Notes – Modified

2.14.2 Company Profile

The Company Profile area is located at the right-hand side of the Switchboard panel. By default, this is hidden. To view the Company Profile, go to View menu, and then check *Company Information* on the drop-down list.

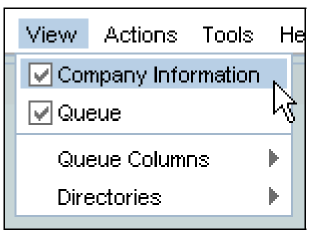


Figure 109 View Menu – Company Information

To modify content in the Company Profile area:

1) Open the Company Profile area by clicking on the slider that contains the words **COMPANY PROFILE**.
2) To add, edit, or delete content, click the text area and type to change content. The content is saved and is available when Receptionist is started next time.

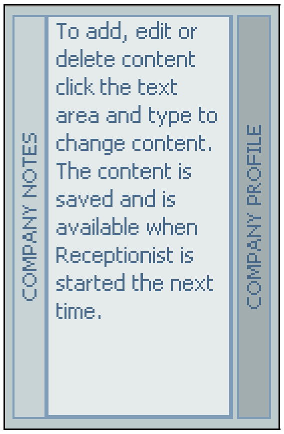


Figure 110 Company Notes – Modified

2.15 Messaging Contacts

Receptionist allows you to select and message contacts that have e-mail configured in the system. You must also have messaging enabled within Receptionist options. The MESSENGER button lights up when selecting a contact who has e-mail configured. Clicking the MESSENGER button displays a messaging pop-up.

To message a contact:

1) Find the contact you wish to call and select this contact by clicking on the contact in the directory.

Figure 111 Message Button

2) Click **MESSENGER**. This displays a Message pop-up with two editable fields, one for the subject of the message, and one for the body.

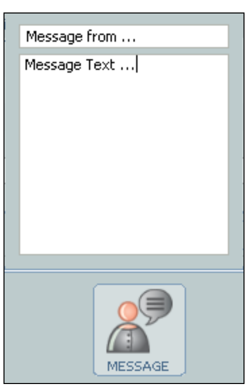


Figure 112 Send Message

3) The subject area is pre-populated if you have a default subject for your messages configured on the *Messaging* tab of the *Options* dialog box. Otherwise, enter a subject for the message you wish to send.

4) Edit the message body by clicking the *Main Message Body* field and enter the text for the message.

5) Click **SEND** from the Control panel to send the message.

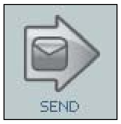


Figure 113 Send Button

3 Glossary

Name	Description
Active Call	This is the call you are currently talking to or dealing with.
Ringing (In)	This is the equivalent to a phone ringing locally.
Calling Party	This is the party who you are receiving a call from.
Called Party	This is the party that you have dialed.
Music on Hold	This is music that is streaming from the service provider for a held call.
Ringing (Out)	This is equivalent to a phone ringing on the called party’s phone.

4 Keyboard Shortcuts

The following is a listing of keystrokes (shortcut keyboard entries) that are available in Receptionist.

4.1 General Control Keys

Key Strokes	Equivalent Mouse Action	Function
ESCAPE	Click OK/CANCEL/EXIT.	Exits from the active window.
Ctrl + P	Click on Company Notes or *Company Notes* tab.	Toggles between *Company Notes* and *Company Profile*.

4.2 Menu Bar Control Keys

Key Strokes	**Equivalent Mouse Action**	**Function**
Alt + O	Click on Tools and then Tools.	Displays *Tools* dialog box.
Alt + R	Click on **Tools** and then **Call History**.	Displays *Call History* dialog box.
Alt + H	Click on **Help** and then **User** Guide.	Opens *BroadWorks Receptionist User Guide*.
Alt + L	Click on **File** and then **Logout**.	Logs out current user from Receptionist and returns to login screen.
F11	Click on **Full Screen**.	Toggles full screen mode on and off for the application window.

4.3 Switchboard Control Keys

Key Strokes	**Equivalent Mouse Action**	**Function**
Ctrl + F1…F10	Click on the *Link* column for a call on the switchboard.	Displays the link symbol in the *Link* column for the call. F1 links the first call, F2 links the second call, and so on. Two calls must be selected for a successful link.
Shift + F1…F10	Click on a call on the switchboard.	Select the call. F1 selects the first call, F2 selects the second call, and so on.

4.4 Contact Directory Control Keys

Key Strokes	Equivalent Mouse Action	Function
Ctrl + F	Click on text entry space for keyword search.	Cursor appears in text entry space for entry of search keyword.
Ctrl + R	Click on **Reset**.	Resets the search filter and shows the current directory.
Ctrl + Shift + <alpha>	Enter a single alphabetical character in the *Search* field and then select a filter from the search filter drop-down list.	Apply filter on sorted column.
Ctrl + S	Click List View or Detail View.	Toggles between the two displayed views of the Contact Directory panel.
Ctrl + UP/DOWN	Select a filter from the Search Filter.	Traverses through the Search Filter values.
UP/DOWN ARROW	Click on each contact on the Contact panel in Detail view.	Selects the contacts on the list.
UP/DOWN/RIGHT/LEFT ARROW	Click on each contact on the Contact panel in List view.	Selects the contacts on the list.
Page UP/DOWN	Scroll through the contact list.	Pages through the contacts on the list.

4.5 Option Control Keys

Key Strokes	Equivalent Mouse Action	Function
<Number Pad />	Click on **Extension**.	Selects the extension number of the selected contact.
<Number Pad *>	Click on **Mobile**.	Selects the mobile number of the selected contact.
<Number Pad ->	Click on **Voice Mail**.	Selects the voice mail number of the selected contact.
Home	Click on **Messenger**.	Selects the messenger for the selected contact.
<Number Pad 0,1…9>	Click on **Number Pad 0, 1,…9**.	Enters the corresponding number in the dialing pad.

4.6 Control Keys

Key Strokes	Equivalent Mouse Action	Function
ENTER	Click on **Dial**.	Dials the selected number.
+	Click on **Transfer**.	Transfers the selected call.
Shift + <Number Pad +>	Click on **Camp On/Camp Off**.	Camps on/off the selected call.
.	Click on **End**.	Ends the selected call.
Space Bar	Click on **Answer** after selecting a call on the switchboard, or double-click an incoming call on the Switchboard panel.	Answers the longest waiting incoming call. Multiple presses of the space bar answers the next call while placing the previous active call on hold.
F1…F10	Click on **Answer** after selecting a call on the switchboard, or double-click an active call on the Switchboard panel.	Sets a call to Active from Ringing. F1 applies to the first call listed on the switchboard; F2 applies to the second call and so on.
F1…F10	Click on **Hold** after selecting a call on the switchboard, or double-click an active call on the Switchboard panel.	Sets a call to On Hold from Active. F1 applies to the first call listed on the switchboard; F2 applies to the second call and so on.
F1…F10	Click on **Unhold** after selecting a call on the switchboard, or double-click a held call on the Switchboard panel.	Sets a call to Active from On Hold. F1 applies to the first call listed on the switchboard; F2 applies to the second call, and so on.
Shift + Ctrl + F1…F10 OR <Number Pad/Del>	Click on a call on the switchboard to select it and then click on **End** to end the call.	Ends the call. F1 ends the first call; F2 ends the second call and so on.
<Number Pad +>	Click on **Blind Transfer/Consult Transfer/Queue Transfer/Voice Mail Transfer/Exit Conference**.	Blind Transfers/Voice mail transfers/Camps/Uncamps/Exits conferences to selected call or call option.
Ctrl + <Number Pad +>	Click on **Conference/Call Pickup/Barge-In**.	Initiates a conference with linked call lines. Performs Pickup/Barge-In on selected contact.
Ctrl + Alt + <Number Pad +>	Click on **Conference Hold/Conference Unhold**.	Toggles a conference from Held to Active state.
Ctrl + Shift + <Number Pad +>	Click on **End Conference**.	Ends a conference. Releases all parties from the conference.

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