Clearspan Hosted Thin Receptionist User Guide

RELEASE 21.0.43

October 2017

NOTICE

TRADEMARKS

Clearspan Hosted Thin Receptionist User Guide
Release #21.0.43
2854-006
October 2017

REVISION HISTORY

The following represents the revision history of this publication.

REVISION NUMBER	DATE COMPLETED	POINT OF CONTACT	DESCRIPTION
006	10/2017	Velvet Moore	Updated for R21.0.43
005	11/2016	Velvet Moore	Updated for R21.0.33
004	03/2015	Velvet Moore	Updated for R20.0.33; rebranded
003	08/2014	Velvet Moore	R20
002	08/22/2013	Bev Marsh	R19.0
001	11/30/2011	Bev Marsh	New Document for R17.0

INTRODUCTION TO RECEPTIONIST

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

Clearspan Receptionist delivers the following real benefits to users:

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

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

Note: For information about the web browsers supported by Receptionist, contact your administrator.

This document describes the Clearspan Hosted Thin Receptionist client.

RECEPTIONIST ENTERPRISE

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

USER INTERFACE

Figure 1 shows the main interface of Receptionist Enterprise.

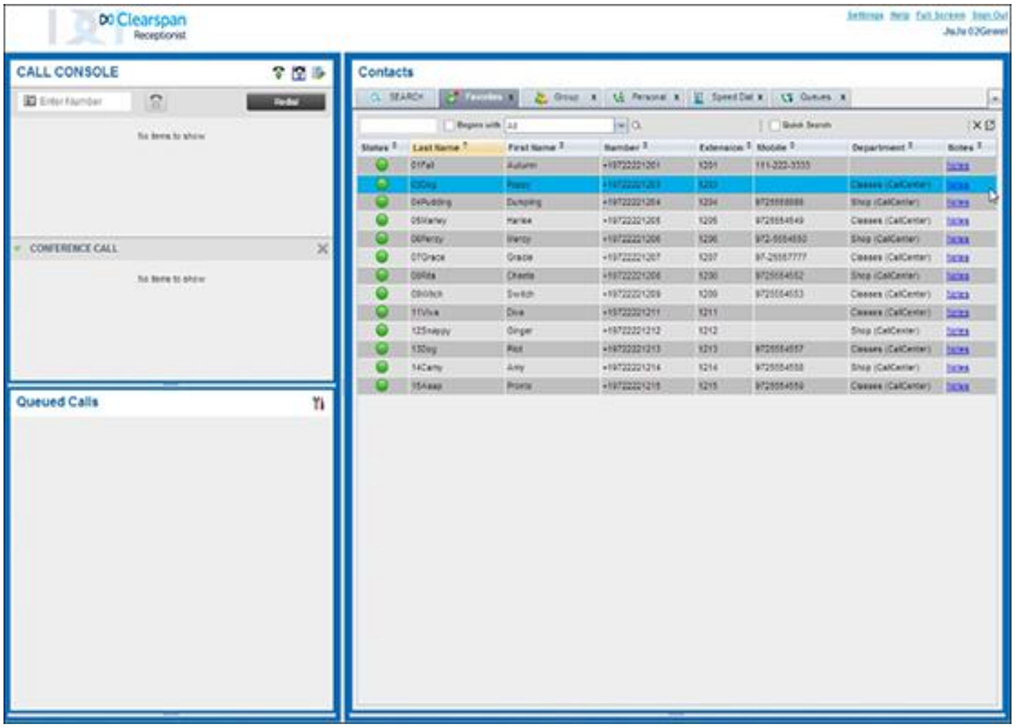


Figure 1 Receptionist Enterprise Main Interface

The interface contains the following main work areas:

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

For more information, see section *Explore Workspace*.

CONTACT DIRECTORIES

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

DIRECTORY NAME	CONTENTS	COMMENTS
Favorites	This consists of the contacts whose phone status you are currently monitoring. The list of contacts to monitor must be configured for you or by you on the web portal.	Monitoring is limited to 200 static contacts enterprise-wide.
Group/Enterprise	This consists of all contacts in your Clearspan group or enterprise directory. This is the same directory that you can access through the web portal. However, if your enterprise administrator restricted your access to your enterprise directory, you can only see the contacts in your group.	You can dynamically monitor contacts in your Group/Enterprise directory. The maximum number of contacts you can dynamically monitor is configured by your administrator and it cannot exceed 100..
Group/Enterprise Common	This consists of all contacts in your group's or enterprise's common phone list configured by your administrator on Clearspan.	The directory may be empty if your administrator has not configured any contacts.
Monitored Contacts	This consists of contacts whose phone status you are currently dynamically monitoring.	If the directory is empty, it is not shown.
Personal	This consists of all contacts in your personal directory on the Clearspan web portal.	
Speed Dial	This consists of all speed dial codes configured for you or by you for your Speed Dial services.	You need to have Speed Dial 8 and/or Speed Dial 100 services assigned.
Instant Message	This consists of the IM&P users that you are subscribed to.	You need to have the Integrated IM&P or Third-Party IM&P service assigned.
Queues	This consists of the call centers and associated DNIS numbers that you are staffing as an agent or supervising. It allows you to transfer calls into queues quickly.	You need to have Call Center service assigned.
LDAP (search only)	This consists of all users found in the configured LDAP directory. Receptionist provides you with search access to LDAP and results are displayed in the *Search* tab.	The directory needs to be configured by your system administrator. Otherwise, it is not visible.
Custom: <custom contact directory	This consists of all contacts in your custom contact directories configured	You may not have any contact

DIRECTORY NAME	CONTENTS	COMMENTS
name>	by your administrator on the web portal. Each custom directory is displayed in a separate tab.	directories or you may have several.
Outlook	This consists of all your Outlook contacts.	

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

CALL MANAGEMENT FUNCTIONS

The Receptionist Enterprise provides the following call management functions:

FUNCTION	QUICK REFERENCE
View Call Details	View Call Information
Dial Contact	Dial Contact
Dial Ad Hoc Number	Dial Ad Hoc Number
Redial	Redial Number
Speed Dial	Speed Dial
Dial From Call History	Dial from History
Answer Call	Answer Call
Hold Call	Put Call on Hold
Resume Held Call	Resume Held Call
End Call	End Call
Blind Call Transfer	Blind Transfer Call
Supervised Call Transfer	Conduct Supervised Transfer
Consulted Call Transfer	Transfer with Consultation
Transfer to Voice Mail	Transfer to Voice Mail
Transfer to Queue	Transfer to Queue
Busy Camp On	Conduct Busy Camp On
Group Call Park	Conduct Group Call Park

FUNCTION	QUICK REFERENCE
Directed Call Pickup	Pick Up Call
Operator Call Barge-in	Barge in on Call
Start Conference Call	Start Three-Way Conference
Add Participant	Add Participant to Conference
Hold Conference Call	Hold Conference
Resume Conference Call	Resume Held Conference
Put Participant on Hold	Put Conference Participant on Hold
Take Participant off Hold	Resume Conference Participant
End Participant	Remove Conference Participant
Leave Conference Call	Leave Conference
End Conference Call	End Conference

For more information, see section *Manage Calls*.

GETTING STARTED

Receptionist is hosted on Clearspan and is accessed over the network either from your web portal or from a web browser. The sign-in procedure is the same for all Receptionist editions.

Notes: The minimum required screen resolution for Receptionist is 1024 x 768 pixels.

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

When using the Outlook Integration feature with Microsoft Outlook 2010 or Outlook 2013 (32- or 64-bit edition), make sure Outlook is running before Receptionist is launched; otherwise, Outlook Integration functionality does not work.

LAUNCH RECEPTIONIST FROM WEB PORTAL

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

To access Receptionist from the web portal:

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

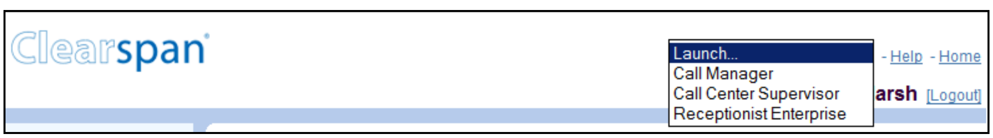


Figure 2 Clearspan Web Portal Logo Pane – Launching Receptionist

You are automatically signed in. As Receptionist starts, a Java Network Launch Protocol (JNLP) file required to run some of the Receptionist features is downloaded to your machine. You must agree to run the file; otherwise, the features will not be available. For more information, see section *Launch JNLP File*.

SIGN IN FROM WEB BROWSER

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

To access Receptionist from a web browser:

1. In your web browser, enter the URL of the Receptionist client on Clearspan. The Receptionist *Sign-in* page appears.

Figure 3 Receptionist Sign-in Page

2. Enter your Clearspan user ID in *user@domain* format and your password.

   If you are unsure of your user ID and password, contact your company (group or enterprise) administrator.

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

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

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

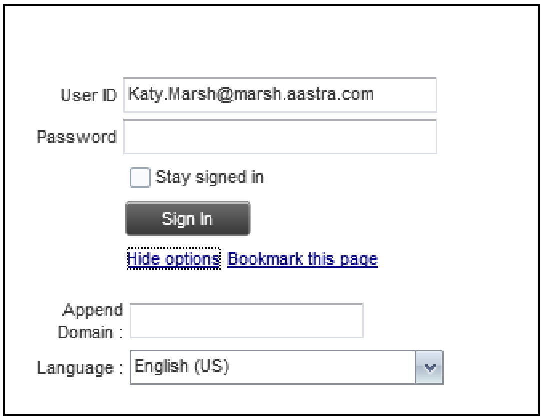


Figure 4 Receptionist Sign-in Page – Advanced Options

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

   This should generally be enabled to help mitigate intermittent internet connections. When disabled, the client signs out the user when the connection is lost.
7. To add a bookmark to the *Receptionist Sign-in* page in your browser, click **Bookmark this page** and follow the instructions of your browser.
8. Click **Sign In**.

   You are signed in. As Receptionist starts, a JNLP file required to run some of the Receptionist features is downloaded to your machine. You must agree to run the file; otherwise, the features will not be available. For more information, see section *Launch JNLP File*.

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

LAUNCH JNLP FILE

Receptionist needs the Java HTTPS server to run its desktop integration features. To view the list of desktop integration features available in Receptionist, see section *Settings—Plug-ins*. To configure the browser certificate required run HTTP server, see section *Certificate for Desktop Integration Features*.

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

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

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

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

   NOTE: Desktop integration features will not be available if you click Cancel.

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

SIGN-IN RESTRICTIONS

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

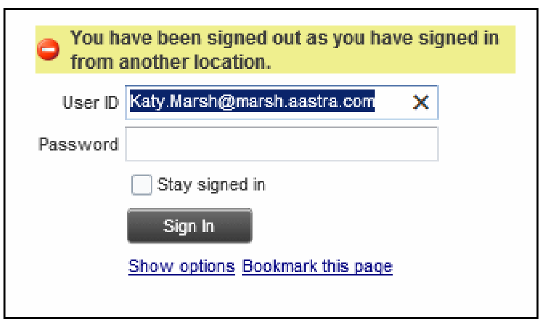


Figure 5 Sign-in Dialog Box with Error Message

GET HELP

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

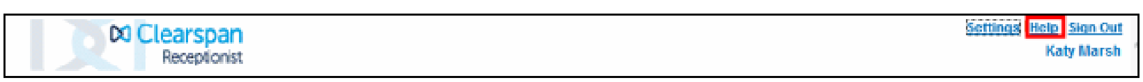


Figure 6 Main Interface (Top of Page) – Help Link

To access this document:

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

SIGN OUT

To sign out of Receptionist:

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

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

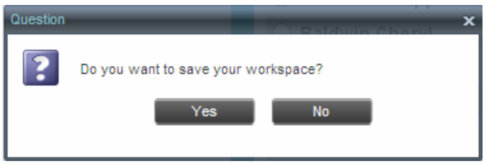


Figure 7 Question Dialog Box

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

SET UP YOUR ENVIRONMENT

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

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

For information about other Receptionist configuration options, see section *Configure Receptionist*.

CHANGE YOUR IM&P PRESENCE STATE

When you sign in to Receptionist, Receptionist connects to the Instant Messaging and Presence (IM&P) server and sets your presence state to "Available".

Subsequently, Receptionist displays your unified instant messaging presence, which reflects your presence in various instant messaging clients when you are logged in through several devices and applications.

Your unified presence state can change either when you manually change it or when Receptionist receives information about your presence state change from other clients.

The possible states are *Available*, *Busy*, *Away*, and *Offline*. When you are in the *Available*, *Busy*, or *Away* state, you are considered to be online.

Receptionist also allows you to provide a status message to display to your contacts.

IM&P capabilities are only available when you are online. For more information about the IM&P capabilities of Receptionist, see section *Monitor IM&P Contacts and Chat with Contacts*.

To change your presence state:

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

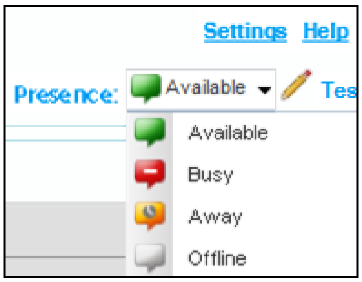


Figure 8 Logo Pane – IM&P Presence State Control

When you are online, you can set a status message to display to your contacts.

To set an IM&P status message:

1. Click the **Edit** button  next to the *Presence* box. The *Set IM Status* dialog box appears.

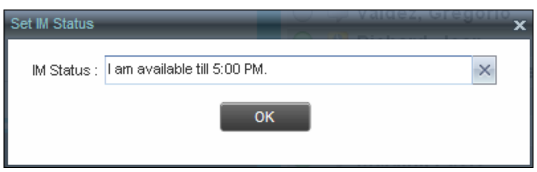


Figure 9 Set IM Status Dialog Box

2. Enter your message and click **OK**.

3. To see your message, move the mouse over the Edit button . A ToolTip with your presence massage appears.

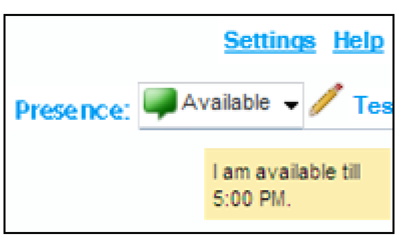


Figure 10 IM&P Status Message

CHANGE YOUR PASSWORD

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

To change your password:

1. At the top right-hand side of the main interface, click the **Settings** link. The *Settings – General* page appears.

2. In the *Account* area, click the **Change Password** link. The area expands allowing you to change your password.

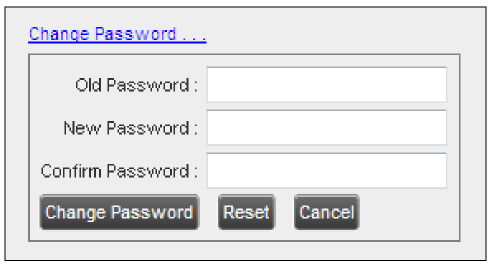


Figure 11 Account – Change Password

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

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

EXPLORE WORKSPACE

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

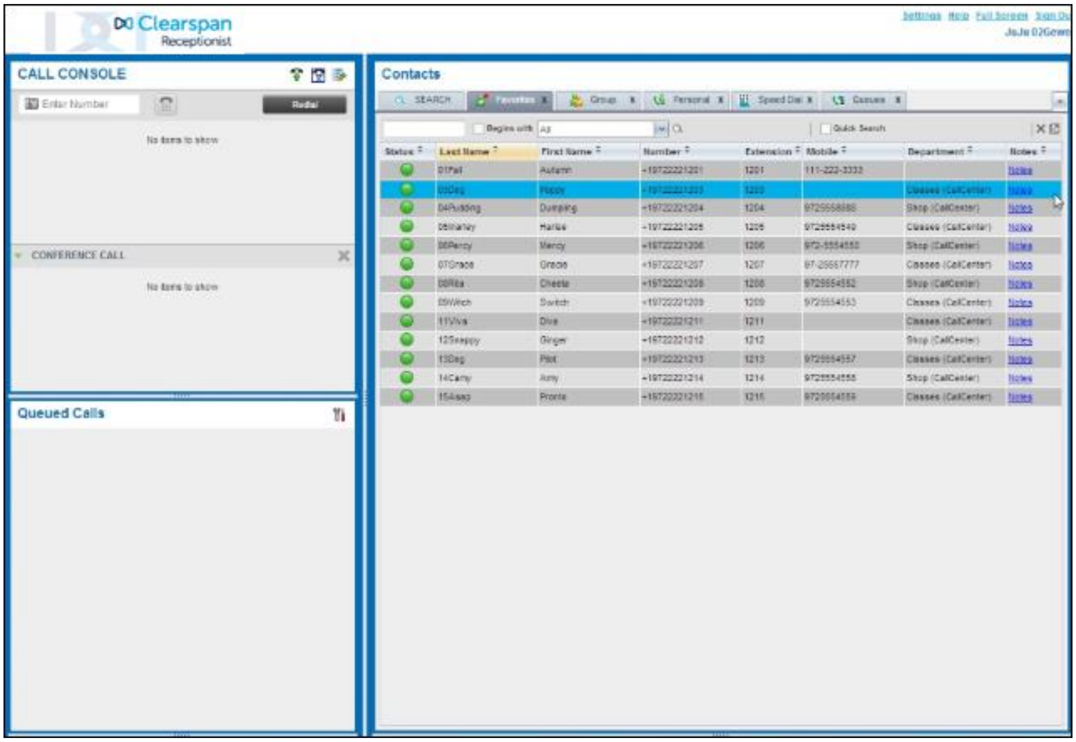


Figure 12 Receptionist Enterprise Main Interface

Many visual aspects of Receptionist are configurable. For example, you can decide which windows should be open and change the size and placement of windows on the screen. You can then save your workspace and retrieve it the next time you log in. For more information on saving your settings, see section *Workspace*.

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

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

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

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

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

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

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

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

The *Settings* pages, accessed via the Settings link and used to configure Receptionist, are described in section *Configure Receptionist*.

The *Call History* dialog box is described in section *Manage Call History*.

The *Chat* windows are described in section *Monitor IM&P Contacts and Chat with Contacts.*

LOGO PANE

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

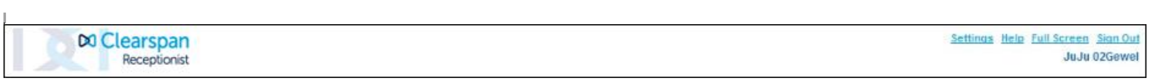


Figure 13 Receptionist Logo Pane

GLOBAL MESSAGE AREA

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

SETTINGS, HELP, AND SIGN OUT LINKS

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

SIGNED-IN USER INFORMATION

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

Figure 14 Signed-in User Information

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

- Presence – This is your unified IM&P presence state. The possible states are *Available* ( ), *Busy* ( ), *Away* ( ), or *Offline* ( ).
- Information about the following services and features:
  - Calendar Presence Integration
  - In a Meeting – Your Exchange calendar shows that you are currently busy (in a meeting).
  - Away – Your Exchange calendar shows that you are out of the office.
  - Call Forwarding Always (CFA) – You have activated the Call Forwarding Always service.
  - Do Not Disturb (DND) – You have activated the Do Not Disturb service.
  - Voice Messaging .

  The information is presented in the following format:

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

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

  If your Exchange calendar state is not *In a Meeting* or *Away* and DND and CFA services are not turned on, this icon is not displayed.

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

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

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

CALL CONSOLE

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

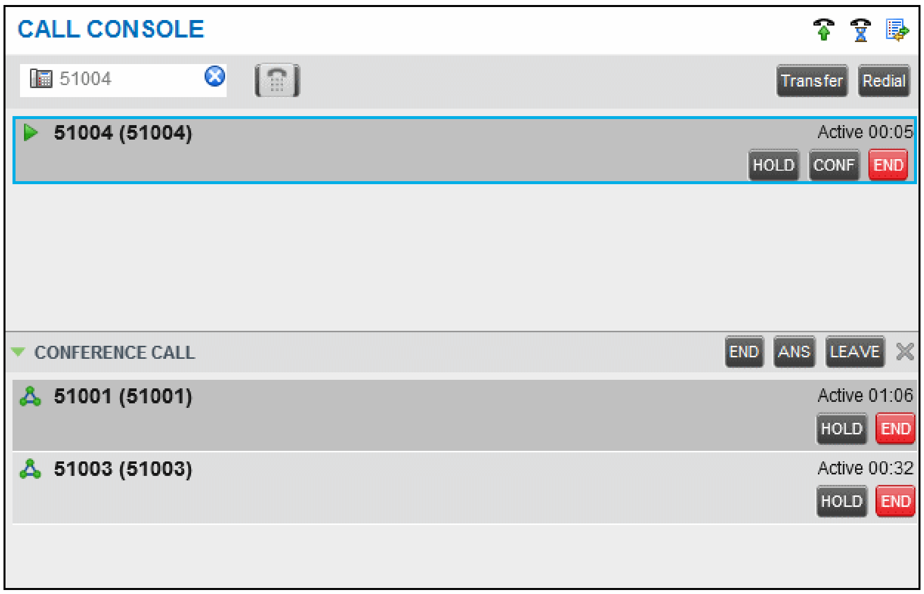


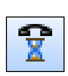
Figure 15 Call Console

The *Call Console* contains the following areas:

- Header
- Dialer
- Current Calls
- Conference Call Panel

HEADER

The Call Console header contains the following controls:

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

- Auto Answer button  – This allows you to answer your calls automatically.

DIALER

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

Figure 16 Call Console – Dialer

- The *Enter Number* text box is where you enter the number to dial.
- The buttons to the right, called action buttons, change depending on the context, and allow you to perform operations on calls.

CURRENT CALLS

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

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

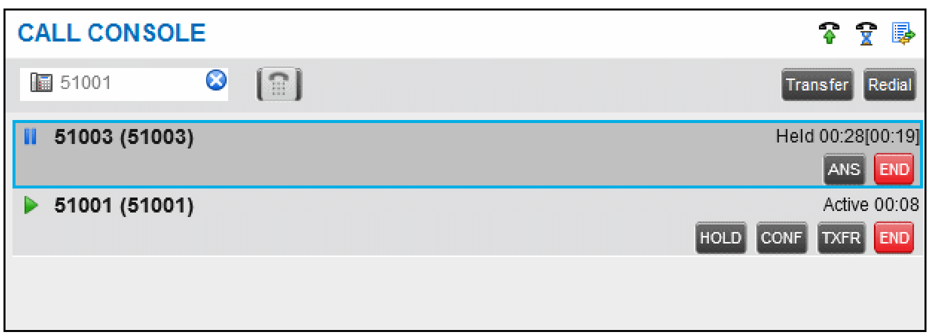


Figure 17 Call Console – Current Calls

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

- Remote CLID – This is the name of the remote party (if available) and the phone number in parenthesis.

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

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

- Call State icon – This is a visual representation of the current state of the call. .
- Call State name – This is the display name of the state the call is currently in.
- Call duration [Held duration] – This is the duration of the call from the time the call was received from Clearspan and it accurately reflects how long the call has been present in the system. In addition, for held calls, the time a call has been on hold is also displayed.
- Security Classification (if applicable) – This is the security classification level of the call.
- Action buttons – These buttons are for the operations that you can currently take on the call.

CONFERENCE CALL PANEL

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

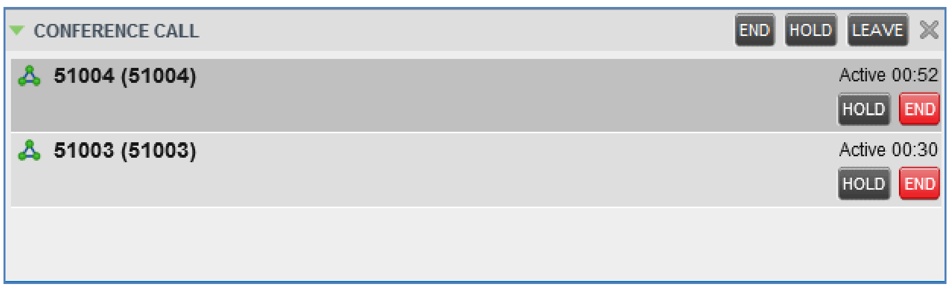


Figure 18 Conference Call Panel

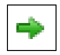
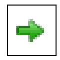
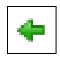
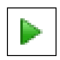
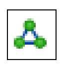
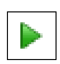
The header bar contains various controls that allow you to manage the conference:

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

The panel lists the call legs that make up your current conference. Each two-way call is displayed on a separate line. The information displayed for each call leg is the same as the information displayed for a two-way call.

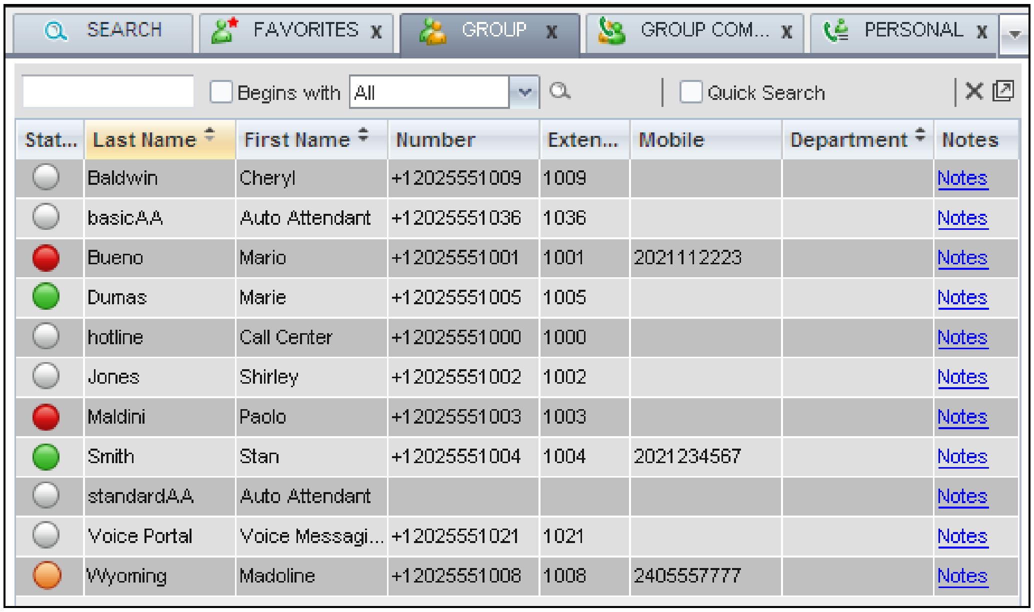
CALL STATES AND ACTIONS

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

CALL STATE	DISPLAY NAME	DISPLAY ICON	CALL PERSONALITY	CALL ACTIONS
Ringing In (Local)	Incoming Local		Click-To-Dial	Answer, End
Ringing In (Remote)	Incoming		Terminator	Answer, Conference, End
Ringing Out, Outgoing	Outgoing		Originator	Conference, End
Active	Active		Any	Transfer, Hold, Park, Camp, End, Conference
On Hold	Held		Any	Transfer, Resume, Park, Camp, End, Conference
On Hold (Remote)	Remote Held		Any	Transfer, Hold, End, Conference
Active (In Conference)	Active		Conference	Transfer, Hold, End
Held (In Conference)	Held		Conference	Resume, Transfer, End
Ringing In (Recalled Call)	Recalled		Terminator	Answer, Conference, End
Parked Call	Parked (<DN>)		Any	Answer, End

CONTACTS PANE

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



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

Figure 19 Receptionist Enterprise Contacts Pane

The tabs you see depend on your Receptionist edition, system configuration, as well as the services assigned to you. For information, see section *Introduction to Receptionist* or see your administrator.

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

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

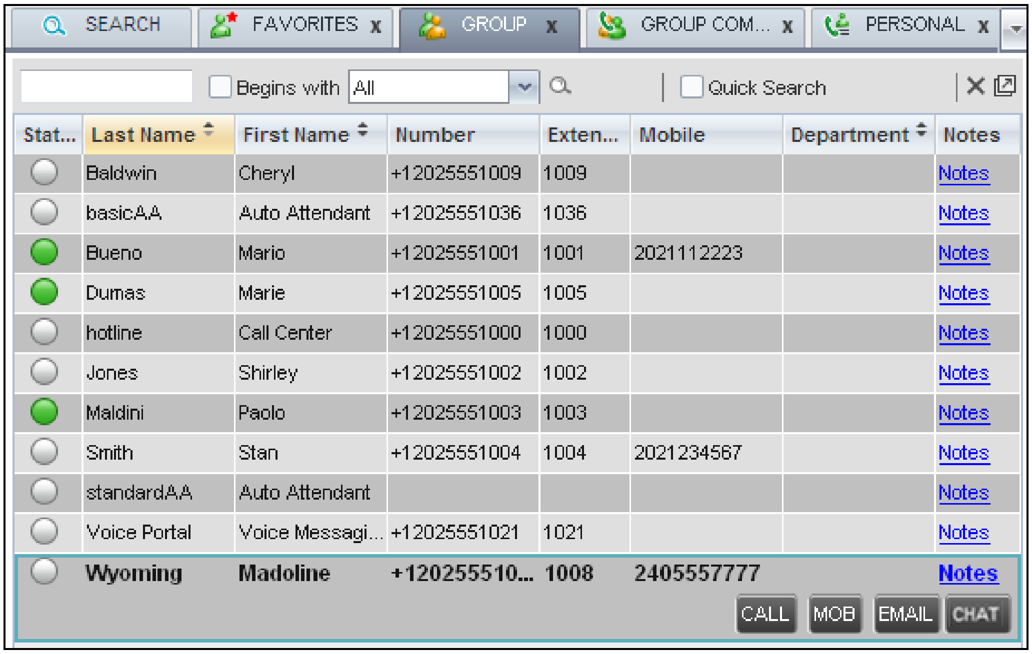


Figure 20 Group Tab – Contact in Focus with Action Buttons

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

DIRECTORY MANAGEMENT BAR

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

Directories Management Bar

DIRECTORIES LIST

The drop-down arrow  to the right of the directories tabs, when clicked, displays the list of directories available to you, and allows you to select directory tabs to display in the Contacts pane. When the tabs to display do not fit in the window, scroll arrows appears and allows you to scroll left and right to show hidden tabs.

SEARCH TAB

You use the *Search* tab to look for specific contacts in all your contacts directories and, if available, in the configured *LDAP* directory. For information on performing directory searches, see section *Search Contacts*.

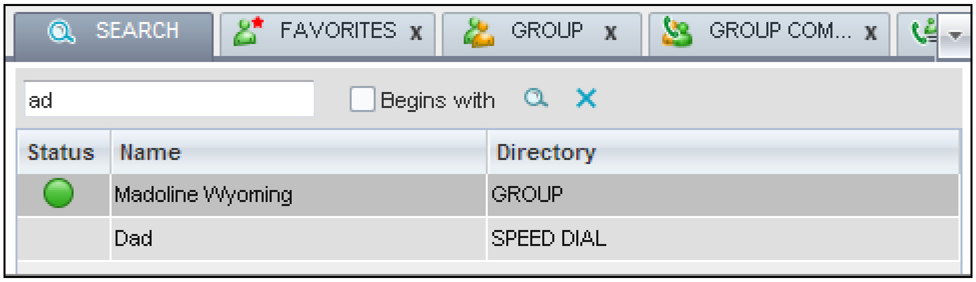


Figure 21 Contacts Pane – Search Tab

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

FAVORITES TAB

You use the *Favorites* tab to monitor the phone state of selected contacts. The *Favorites* directory provides the following information for each contact (as applicable): call state, last and first name, phone number, extension, mobile number, department, and link to notes. Depending on your services and system settings, a contact's state information may also include the unified IM&P presence state and the Exchange calendar state. (The Exchange calendar state is only visible when you expand the contact.)

The contacts to monitor must be configured on the web portal. This is referred to as static monitoring. For more information, see section *Monitor Contacts*.

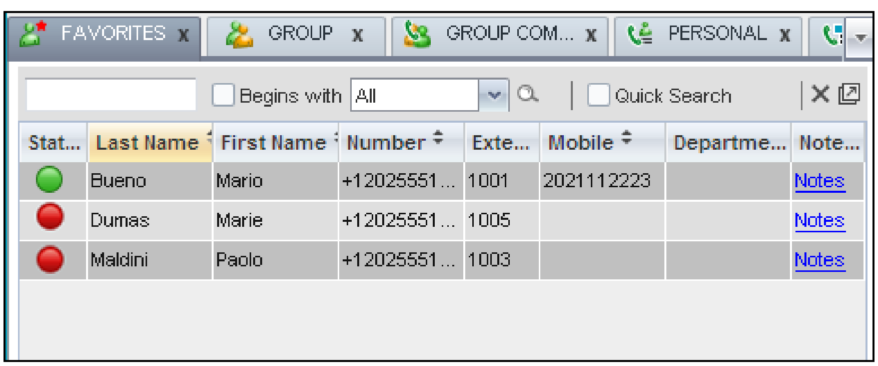


Figure 22 Contacts Pane – Favorites Tab

ENTERPRISE/GROUP TAB

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

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

Depending on your services and system settings, a contact's state information may also include the unified IM&P presence state and the Exchange calendar state. (The Exchange calendar state is only visible when you expand the contact.)

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

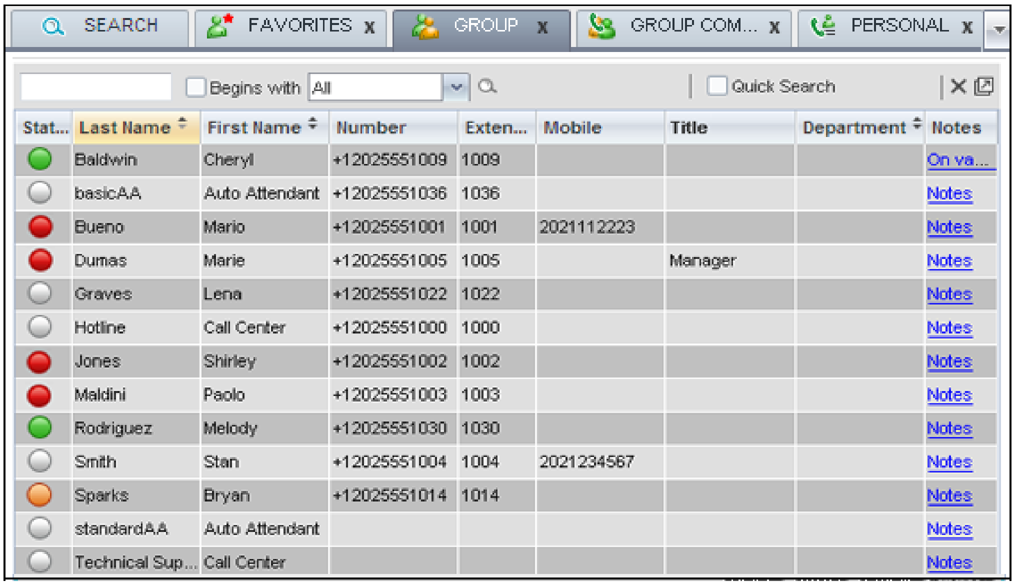


Figure 23 Contacts Pane – Group Tab

GROUP/ENTERPRISE COMMON TAB

The *Group/Enterprise Common* directory contains the contacts in your group's common phone list (if your group is part of a service provider) or your enterprise's common phone list (if your group is part of an enterprise) configured by your administrator on Clearspan.

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

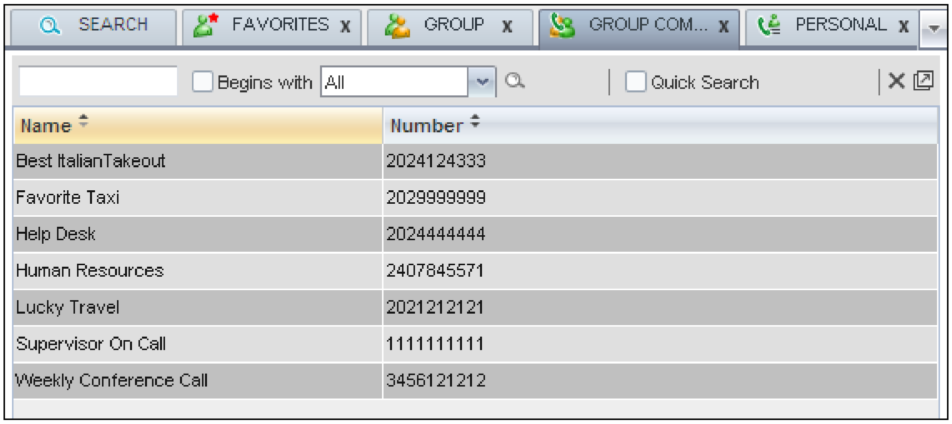


Figure 24 Contacts Pane – Group Common Tab

MONITORED CONTACTS TAB

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

The following information is displayed for each contact (as applicable): call state, last and first name, phone number, extension, mobile number, department, and link to notes. Depending on your services and system settings, a contact's state information may also include the unified IM&P presence state and the Exchange calendar state. (The Exchange calendar state is only visible when you expand the contact.)

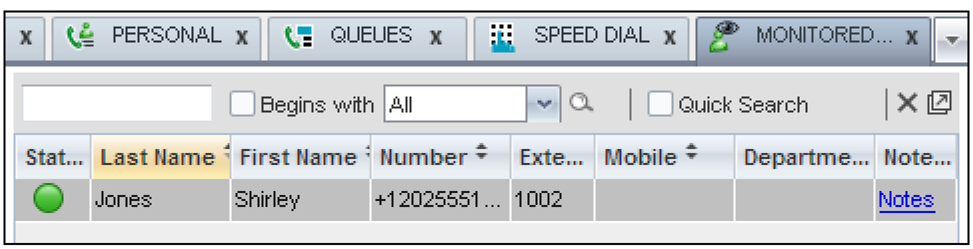


Figure 25 Contacts Pane – Monitored Contacts Tab

PERSONAL TAB

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

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

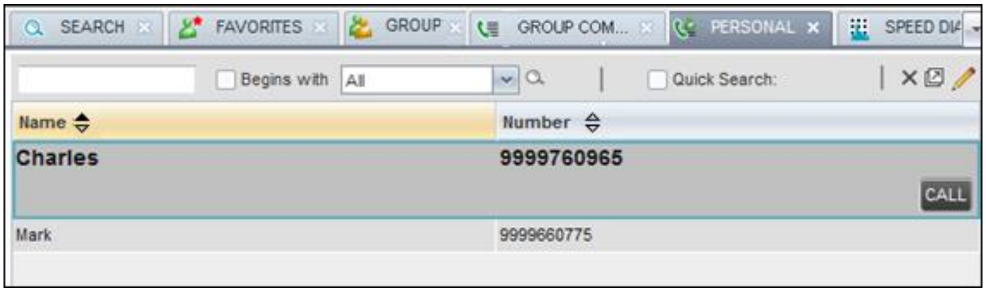


Figure 26 Contacts Pane – Personal Tab

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

SPEED DIAL TAB

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

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

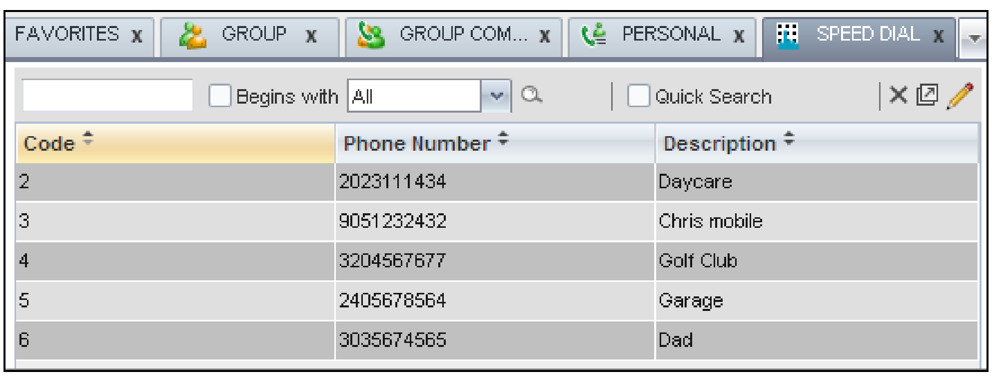


Figure 27 Contacts Pane – Speed Dial Tab

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

QUEUES TAB

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

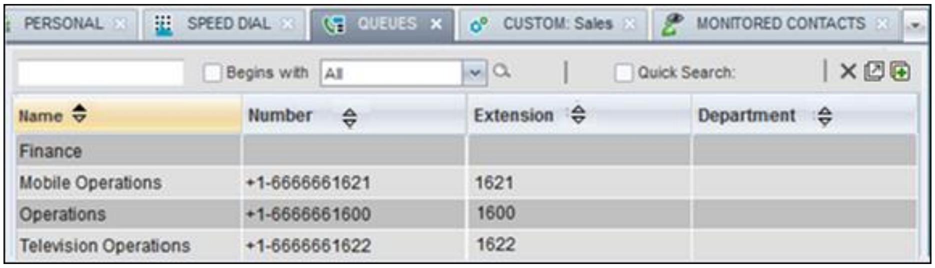


Figure 28 Contacts Pane – Queues Tab

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

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

CUSTOM DIRECTORIES TABS

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

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

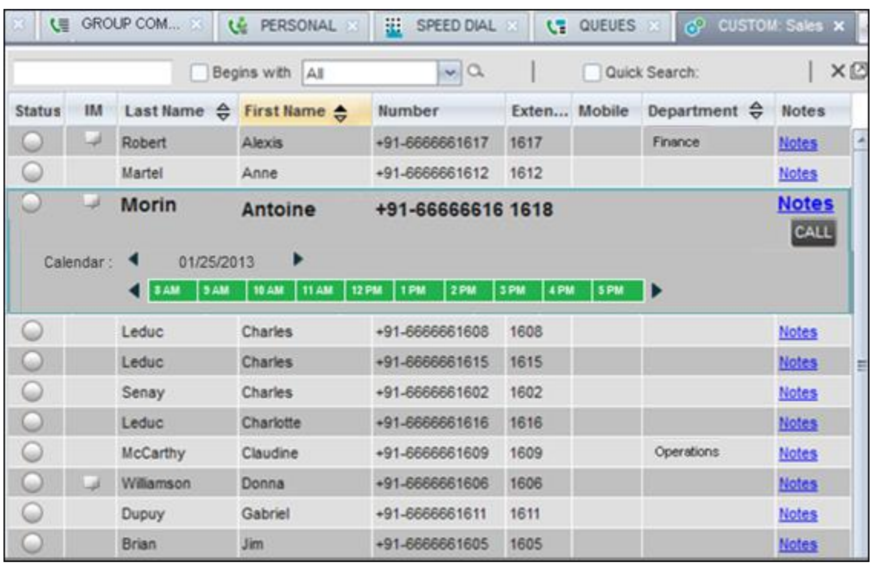


Figure 29 Contacts Pane – Custom (Directory) Tab

INSTANT MESSAGE TAB

The *Instant Message* tab displays IM&P contacts you are subscribed to. The information displayed for each contact includes the contact's name, IM&P ID and unified IM&P

presence state. For information on subscribing to and chatting with IM&P contacts, see section *Monitor IM&P Contacts and Chat with Contacts*.

The tab appears if you have been assigned the *Integrated IM&P* or *Third Party IM&P* service.

When your presence state is set to "Offline", the tab is empty. To change your IM&P presence state, see section *Change Your IM&P Presence State*.

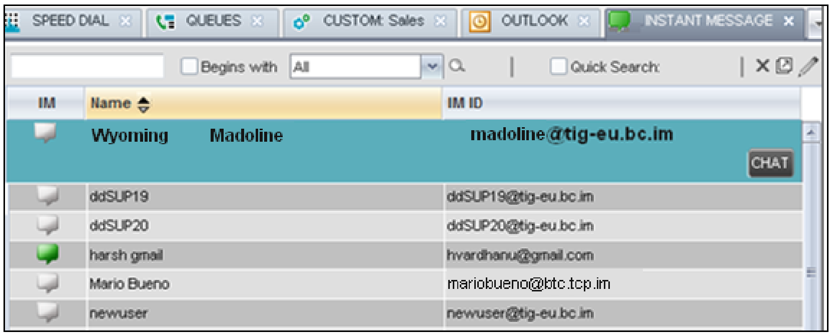


Figure 30 Contacts Pane – Instant Message Tab

OUTLOOK TAB

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

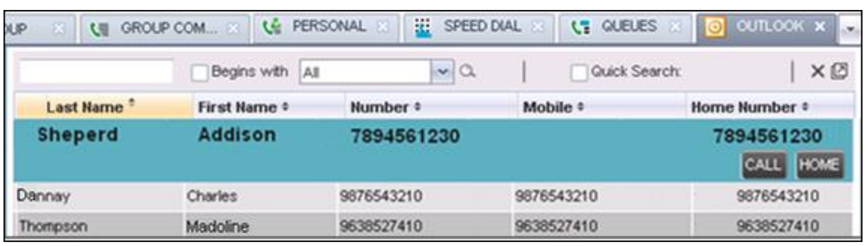
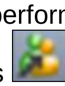


Figure 31 Contacts Pane – Outlook Tab

SEARCH RESULTS TABS

When you perform a search on a directory, you can keep the results of the search and save them in a new contacts directory. The name of the new directory is the same as the name of the directory on which the search was performed, but the directory icon has an arrow similar to the arrow used on shortcut icons .

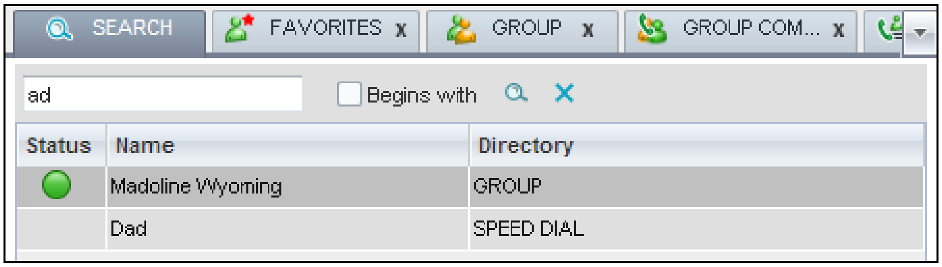


Figure 32 Contacts Pane – Search Results Tab

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

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

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

QUEUED CALLS PANE

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

Figure 33 Queued Calls Pane

The pane lists queued calls for the selected call centers. For information on selecting call centers to display, see section *Select Call Centers to Manage*.

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

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

- The number of calls in queue against the queue length

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

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

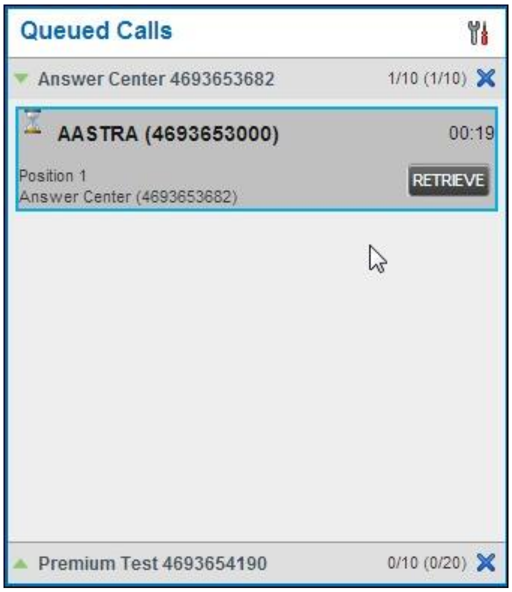


Figure 34 Queued Calls Pane – Call Center Panel (Expanded)

The following information is provided for each call:

- Call Status icon – A graphic representation of the state of the queued call, which can be one of the following:
  - Waiting  – The call is queued, waiting to be answered.
  - Announcement  – An announcement is being played to the caller.
  - Reordered  – The position of the call in the queue has been changed.
  - Bounced  – The call has been bounced.
- Name (if available) and phone number of the calling party.
- The total call time, including the time in the current priority bucket (in parentheses).

Clicking a call expands the call to show additional data:

- Position of the call in the queue.
- Priority of the call (Premium Call Center).

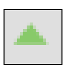
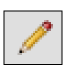
- The name (if available) and the phone number of the call center (or DNIS, if applicable) that was called.

When you move the mouse over a queued call, the action buttons that can be applied to the call appear. For information, see section *Call Action Buttons*.

CONTROLS

Receptionist controls are designed in a contextual manner, that is, most controls appear only when the action they represent can be taken. For example, when you select a call and enter a number or select a contact, the Transfer button appears, allowing you to transfer the call. The controls that correspond to call operations, such as Dial, Transfer, or Hold are called action buttons. They are described in section 0*Call Action Buttons*.

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

NAME	DESCRIPTION
Common Controls	
 Options	This allows you to organize items in lists.
 Expand/Collapse	This shows or hides the contents of a window, panel, or tab.
 Close	This closes an interface element, such as window, pane, tab, or panel.
 Edit	This allows you to edit contacts in some directories.
Call Console Controls	
 Call History	This displays your call logs.
 Call Waiting	This allows you to turn Call Waiting on or off.
 Auto Answer	This automatically answers your incoming calls.
 End Conference	This ends a conference call.
 Leave Conference	This allows you to leave the conference while allowing other participants to continue the call.
 Hold Conference	This places a conference call on hold.

NAME	DESCRIPTION
Resume Conference	This resumes a held conference.
Web Pop URL	This opens a page in your browser at the configured URL to provide additional information about the caller.
Pull Out	This places directory search results in a new tab.
Clear Search	This clears the search results.
Group Queues	This groups queues by call center.
Call Notification Pop-up Window	
Web Pop URL	This opens a page in your browser at the configured URL to provide additional information about the caller.
vCard	This saves the caller's phone number and personal information as a vCard in Microsoft Outlook.
Transfer to Voice Mail	This transfers an incoming call to your voice mail.
Chat Window	
Call	This places a call to your chat partner.
Add User to Chat	This allows you to select users to add to the chat.
Invite	This invites selected users to the chat.
Pop-out	This takes a chat window out of the main interface and makes it a free-floating window.
Pop-in	This anchors a free floating chat window inside the main interface.
Minimize	This minimizes the chat window.
Close	This closes the chat window.

CALL ACTION BUTTONS

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

Action buttons are contextual, that is, they appear on a line/entry only when you move the mouse over that entry and when the corresponding action can be performed on that entry (with the exception of the Mon button on virtual user entries).

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

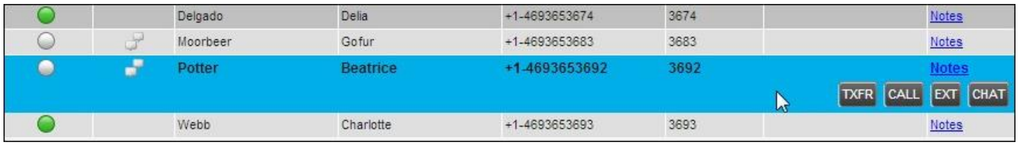
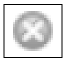


Figure 35 Group Directory – Contact in Focus with Action Buttons

The following table lists action buttons available in Receptionist.

BUTTON	DESCRIPTION
Dial	This dials the number you entered in the *Dialer*.
CALL	This places a call to the selected contact or to a number from Call History. This button is used when there is only one number available for the contact.
CALL split Call	When there is more than one number available for a contact, the split Call button is displayed for the contact. Clicking the Call button, places a call to the default destination number of the contact. Clicking the drop-down arrow (the right Call button), displays the list of available numbers for the contact. Selecting a number places a call to that number.
Redial Redial	This redials the last dialed number.
MOB Mobile	This dials the contact's mobile number.
EMAIL E-mail	This brings up a new e-mail message window with the contact's e-mail address, allowing you to send an e-mail to the contact.
Transfer Transfer	This transfers a call to an ad hoc number entered in the Dialer.
TXR Transfer	This transfers a call to a selected number or contact. This button is used when there is only one number available for the contact..
TXR split Transfer	When there is more than one number available for a contact, the split Transfer button is displayed for the contact. Clicking the Transfer button, transfers the call to the default destination number of the contact.

BUTTON	DESCRIPTION
	Clicking the drop-down arrow (the right Transfer button), displays the list of available numbers for the contact. Selecting a number transfers the call to that number.
VM Transfer to Voice Mail	This transfers a call to the selected contact's voice mail.
ANS Answer	This answers an incoming call, answers an unanswered call for a contact, or resumes a held call.
HOLD Hold	This places a call on hold.
END End	This ends a call.
CONF Conference	This establishes a conference call or adds a call to a conference.
CAMP Camp	This camps the call on a busy contact.
BARGE Barge In	This barges in on a contact's call.
PARK Park	This parks a call on a contact.
RECORD Record	This records a call.
PAUSE Pause	This pauses call recording.
RESUME Resume	This resumes call recording.
STOP Stop	This stops recording a call.
MON Monitor	This starts monitoring the state of the selected contact, except when the contact is a virtual user. Virtual users cannot be monitored.
CHAT Chat	This opens a chat window allowing you to chat with an IM&P contact.
PROMOTE Promote	This promotes a selected call to the next higher priority bucket.
RETRIEVE Retrieve	This retrieves a selected call from the queue to the supervisor's device.
REORDER Reorder	This changes a selected call's position in the queue.

BUTTON	DESCRIPTION
 Web Pop URL	This opens a page in your browser at the configured URL to provide additional information about the caller.
 Delete Call Log	This deletes a call log from Call History.

MANAGE CALLS

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

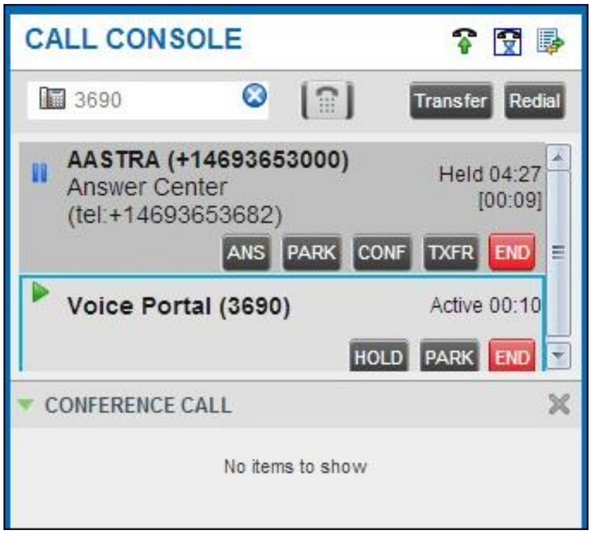


Figure 36 Call Console

DRAG AND DROP CALL ONTO CONTACT

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

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

However, you can enable automatic call transfer on *Drag and Drop* (if available). If automatic transfer is enabled, then the call is transferred to the contact's phone number when you drop the call on the contact.

Figure 37 Dragging Call and Dropping it on Contact

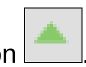
VIEW CALL INFORMATION

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

VIEW CURRENT CALLS

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

To view your conference call:

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

VIEW INCOMING CALL DETAILS

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

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

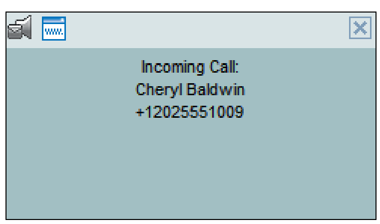


Figure 38 Call Notification Pop-up Window for Non-ACD Call

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

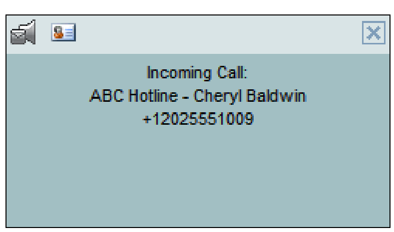


Figure 39 Call Notification Pop-up Window – Call from Call Center

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

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

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

SAVE VCARD

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

To save caller's information as a vCard:

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

This button is present only when Outlook is running.

OPEN URL

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

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

This feature is configured on the *Settings – General* configuration page. For more information, see section *Settings – General*.

To open a URL for the incoming call:

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

To open a URL for any call:

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

VIEW AND CHANGE SECURITY CLASSIFICATION OF CALLS

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

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

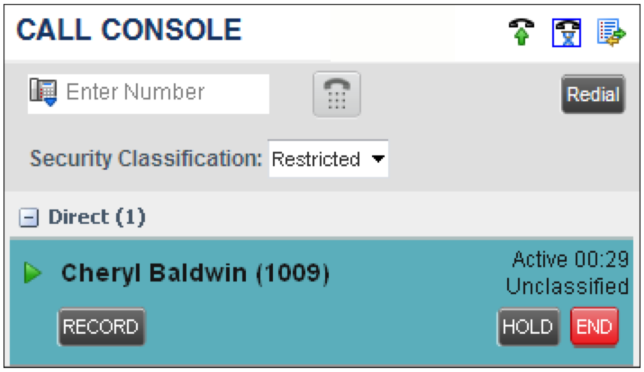


Figure 40 Security Classification of Calls

CHANGE SECURITY CLASSIFICATION

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

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

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

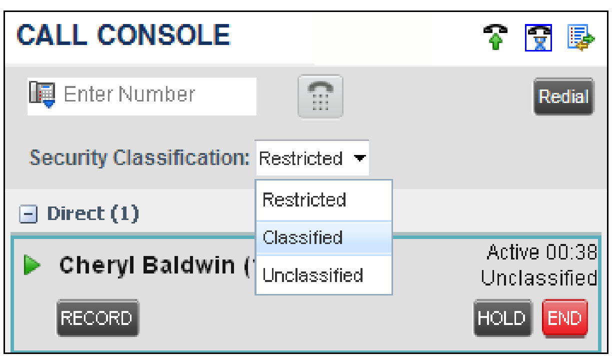


Figure 41 Security Classification Levels

To change your current security classification:

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

ANSWERING CALLS

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

ANSWER CALL

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

To answer an incoming call:

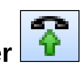
Move the mouse over the call and click **Answer** . The call state changes to *Active*.

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

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

Click anywhere on the text in the window.

To answer calls automatically:

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

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

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

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

PICK UP CALL

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

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

To answer a call for a contact:

1. Expand your *Group/Enterprise* or *Favorites* directory and click the target contact to expand it. The contact's state must be *Ringing*.

2. Move the mouse over the contact and click **Answer** ANS.

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

HOLD AND RESUME CALLS

You can only put an active call on hold.

PUT CALL ON HOLD

To put a call on hold:

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

RESUME HELD CALL

To resume a held call:

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

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

MAKE AND END CALLS

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

DIAL AD HOC NUMBER

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

Figure 42 Dialer

To dial an ad hoc number:

1. In the *Dialer*, enter the phone number and click **Dial** . The call appears in the *Call Console* as *Incoming Local* and your phone rings.

2. Click **Answer** for that call. An outbound call is placed and the call state changes to *Outgoing*.

REDIAL NUMBER

Receptionist keeps up to ten most recently dialed numbers.

To redial one of the recently dialed numbers:

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

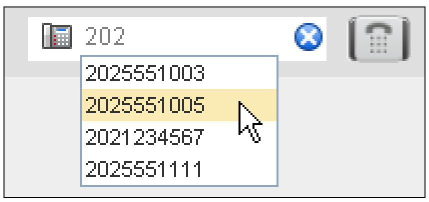


Figure 43 Dialer – Select Recently Dialed Number

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

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

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

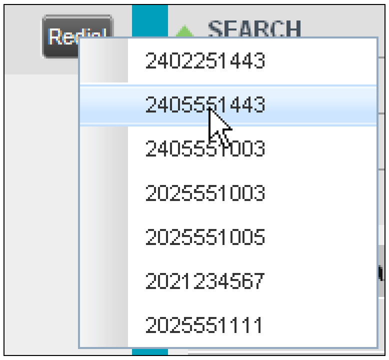


Figure 44 Dialer – Redialing Number

DIAL CONTACT

You can dial contacts from any directory available in Receptionist.

To dial a contact:

1. In the *Contacts* pane, expand the directory from which you want to dial a contact.
2. Click the contact to expand it and click **Call** 

for that contact. A Click-To-Dial action is initiated and your phone rings.

   Figure 45 Group Directory – Contact in Focus with Split Call Button

3. Answer the phone. An outbound call is placed.
4. Alternatively, to dial the contact's alternate number, if available, click the right **Call** button and select the number from the list.

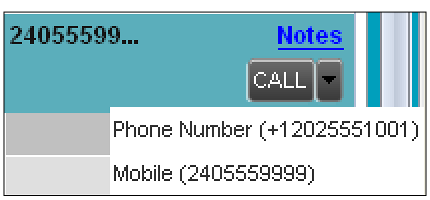


Figure 46 Split Call Button – List of Contact's Alternate Numbers

SPEED DIAL

To speed dial a contact:

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

.

DIAL FROM HISTORY

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

To dial from Call History:

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

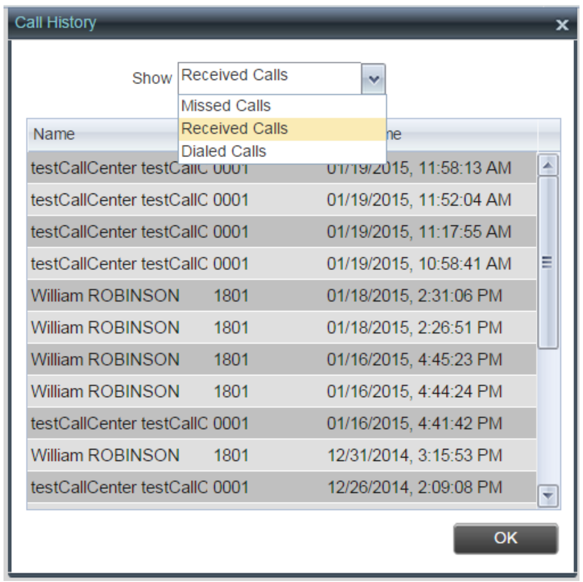


Figure 47 Call History Dialog Box

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

END CALL

To end a call:

Click **End** END for that call.

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

TRANSFERRING CALLS

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

BLIND TRANSFER CALL

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

To blind transfer a call to an ad hoc number:

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

To blind transfer a call to a contact:

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

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

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

CONDUCT SUPERVISED TRANSFER

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

To conduct a supervised transfer:

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

TRANSFER WITH CONSULTATION

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

To transfer a call with consultation:

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

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

TRANSFER TO VOICE MAIL

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

To transfer a call to voice mail:

1. In the *Call Console*, select the call to transfer.
2. In the *Contacts* pane, expand the *Group/Enterprise* or *Favorites* directory and find the contact. Find yourself if you want to transfer the call to your voice mail.
3. Click the contact and click **Transfer to Voice Mail** VM for that contact.

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

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

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

To transfer an incoming call to your voice mail:

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

TRANSFER TO QUEUE

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

To transfer a call to a queue:

1. In the *Call Console*, select the call to transfer.
2. Click the *Queues* tab.
3. Click the destination queue and click **Transfer** TXR.

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

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

PARKING AND CAMPING CALLS

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

CONDUCT BUSY CAMP ON

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

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

To camp a call on a busy contact:

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

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

CONDUCT GROUP CALL PARK

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

To perform a Group Call Park:

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

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

MANAGE CONFERENCE CALLS

You manage your conferences in the *Call Console*.

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

You can only have one active conference at a time.

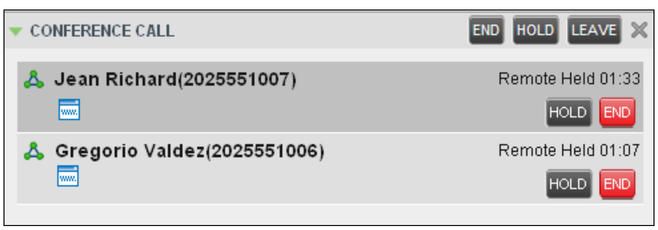


Figure 48 **Call Console – Conference Call Panel**

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

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

START THREE-WAY CONFERENCE

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

To start a conference:

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

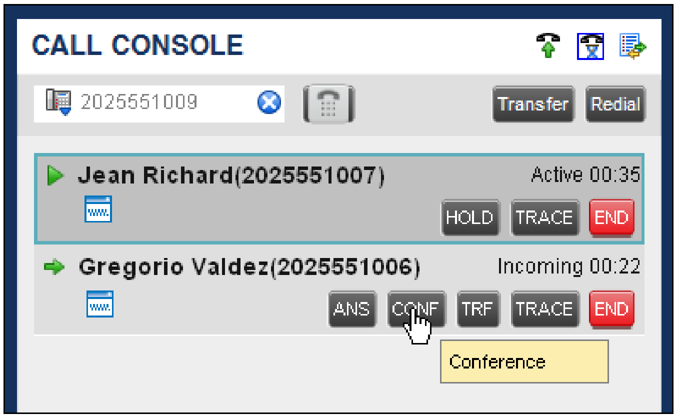


Figure 49 Starting Conference

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

ADD PARTICIPANT TO CONFERENCE

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

To add participants to a conference:

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

HOLD CONFERENCE

To put an active conference on hold:

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

RESUME HELD CONFERENCE

To resume a held conference:

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

PUT CONFERENCE PARTICIPANT ON HOLD

To put a specific conference participant on hold:

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

RESUME CONFERENCE PARTICIPANT

To resume a conference participant:

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

LEAVE CONFERENCE

To leave the conference:

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

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

REMOVE CONFERENCE PARTICIPANT

To end a selected call in the conference:

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

END CONFERENCE

To end the conference:

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

BARGE IN ON CALL

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

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

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

To barge in on a call:

1. Expand the *Group/Enterprise* or *Favorites* directory.

2. Click the target contact and click **Barge In** 

. The contact's status must be *Busy*.

   You enter an ongoing call, thereby establishing a Three-Way Conference. The calls appear in the *Conference Call* panel.

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

for that contact.

You can now perform any conference operation on the call.

RECORD CALLS

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

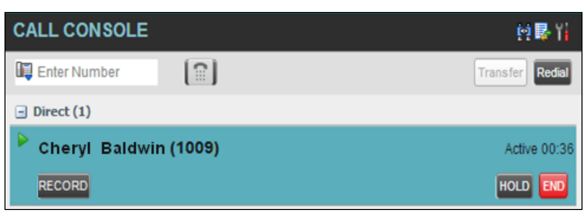


Figure 50 Call in Call Console with Record Button

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

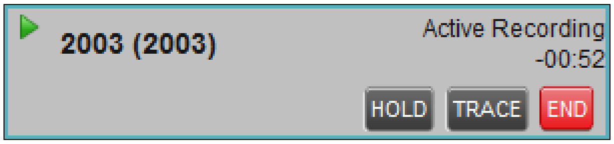


Figure 51 Call Being Recorded

START CALL RECORDING

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

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

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

PAUSE AND RESUME CALL RECORDING

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

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

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

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

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

STOP CALL RECORDING

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

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

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

MESSAGE CONTACTS

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

SEND E-MAIL TO CONTACT

To send an e-mail message to a contact:

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

for the contact. This shows a new e-mail window for the configured Messaging service.
3. Type your message and click **Send**.

MONITOR IM&P CONTACTS AND CHAT WITH CONTACTS

When you have an IM&P service assigned on Clearspan, you can chat with other IM&P users and see the unified IM&P presence state of selected IM&P users directly from Receptionist.

The unified presence state of a contact is their combined instant messaging presence state when they are logged in through multiple devices or applications. For more information, see *View Presence State of Contacts*.

You have to be online to use IM&P capabilities of Receptionist. For information on setting your IM&P presence state, see section *Change Your IM&P Presence State*.

MONITOR IM&P CONTACTS

To view the presence state of an IM&P contact, you have to first subscribe to the contact. Otherwise, Receptionist displays the contact's state as *Unsubscribed*. When you send a subscription request to a contact and are waiting for a reply, Receptionist displays the contact's state as *Pending Subscription*.

The following directories display the IM&P state of contacts: Instant Message, Agent, Supervisor, Enterprise/Group, Favorites, Custom, and Search (for contacts from directories that display in the IM&P state).

Note: The Instant Message panel does not include IM&P contacts in the *Unsubscribed* state.

You can subscribe to a contact either by sending a subscription request to the contact or by adding the contact to the *Instant Message* directory.

For information about the operations related to subscribing to contacts and viewing their presence state, see the following sections:

- Subscribe to Contact
- Add Contact to Instant Message Directory
- Modify Contact
- Unsubscribe from Contact
- Accept or Reject Subscription Request
- View Presence State of Contacts

SUBSCRIBE TO CONTACT

To send a subscription request to a contact:

1. Click the IM&P presence icon of an unsubscribed contact in any directory where the presence state of contacts is displayed. The *Contact (IM) Subscribe* dialog box appears.

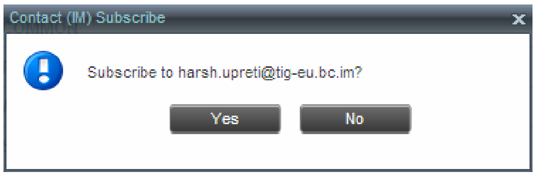


Figure 52 Contact (IM) Subscribe Dialog Box

2. Click **Yes**.

   A subscription request is sent to the contact, and the contact is added to the *Instant Message* directory. The contact's state is set to "Pending Subscription" .

   When the subscription is accepted, the contact's presence state is updated to their actual presence state.

3. To resend a subscription request at any time, click the contact's presence icon again and click **Resend** in the dialog box that appears.

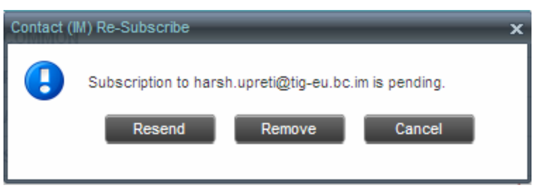


Figure 53 Contact (IM) Re-Subscribe Dialog Box

ADD CONTACT TO INSTANT MESSAGE DIRECTORY

When you add a contact to the *Instant Message* directory, the system automatically sends a subscription request to the contact.

To add a contact to the Instant Message directory:

1. In the *Instant Message* tab, click **Edit** . The *Edit Instant Message Contacts* dialog box appears.
2. Click **Add**. A new line is added below the existing entries, allowing you to define a new entry.

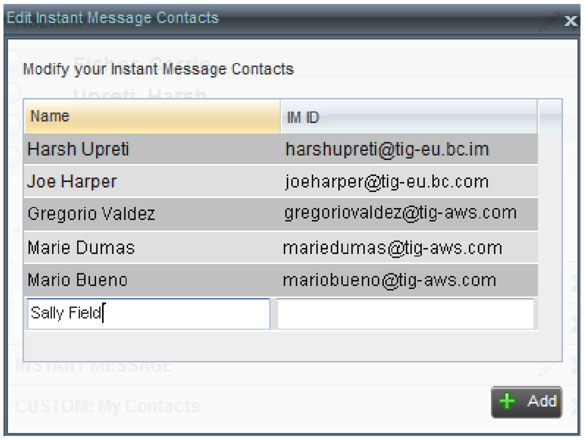


Figure 54 Edit Instant Message Contacts Dialog Box – Add Contact

3. In the *Name* text box, enter the display name of the contact to add.
4. In the *IM ID* text box, enter a valid IM&P ID of the contact.
5. To save the changes, click anywhere in the dialog box outside the entry.

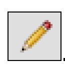
A subscription request is sent to the contact, the contact's presence state is set to "Pending Subscription", and the contact is added to the *Instant Message* tab.

If the contact accepts your request, then the contact's state changes to the actual presence state.

MODIFY CONTACT NAME

You can modify the display name of an existing contact.

To modify the display name of a contact:

1. In the *Instant Message* tab, click **Edit** . The *Edit Instant Message Contacts* dialog box appears.
2. Double-click the contact and enter the new name in the *Name* text box.
3. To save your changes, click anywhere in the dialog box outside the entry.

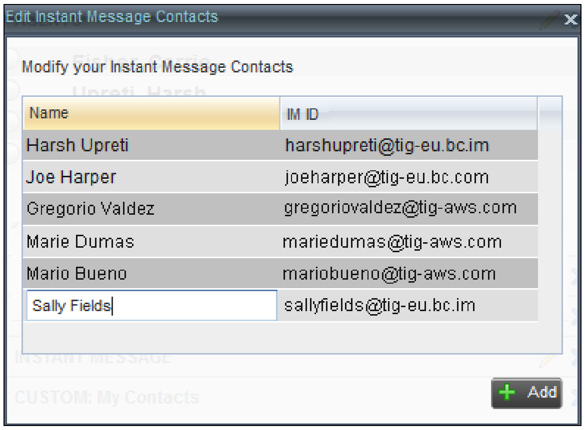


Figure 55 Edit Instant Message Contacts Dialog Box – Modify Contact

UNSUBSCRIBE FROM CONTACT

To stop monitoring a contact:

1. Click the presence icon of the contact. The *Contact (IM) Unsubscribe* dialog box appears.

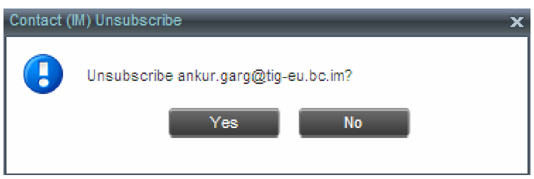


Figure 56 Contact (IM) Unsubscribe Dialog Box

2. Click **Yes**. The contact is removed from the *Instant Message* directory and its presence status changes to *Unsubscribed* in other directories.

ACCEPT OR REJECT SUBSCRIPTION REQUEST

When you receive a request from another user, a dialog box appears allowing you to accept or deny the request.

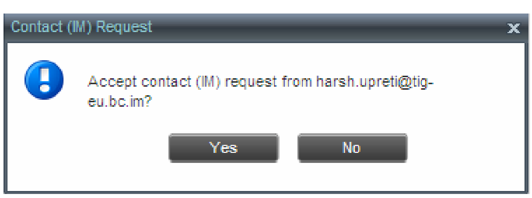


Figure 57 Contact (IM) Request Dialog Box

To accept the request, click **Yes**. If the contact is not yet in your *Instant Message* directory, a request is sent to add the user to the directory.

To reject the request, click **No**.

You can also close the dialog box and ignore the request. If you ignore the request, the dialog box will reappear the next time you go online.

VIEW PRESENCE STATE OF CONTACTS

You can view the presence state of IM&P contacts in the *Instant Message, Agent*, *Supervisor*, *Enterprise/Group*, *Favorites*, *Custom,* and *Search tabs*. The presence icon is displayed to the left of the contact's name.

Receptionist displays the unified instant messaging presence states, which indicates your contacts' availability to communicate using client applications such as Hosted Thin Call Center, Hosted Thin Receptionist, Clearspan Communicator Desktop, or Clearspan Communicator Mobile.

The actual unified presence state of a contact is displayed only if you are subscribed to the contact. Otherwise the contact's state is displayed as *Unsubscribed* or *Pending Subscription*.

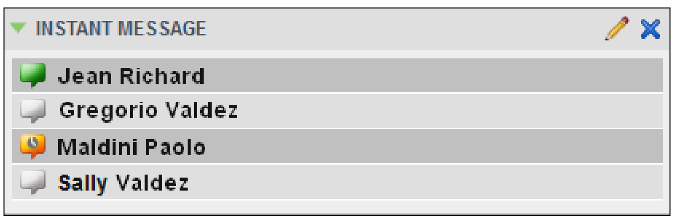


Figure 58 Instant Message Tab – Unified Presence State of Contacts

The following table lists the possible unified presence states of contacts in Receptionist:

IM&P STATE	ICON	DESCRIPTION
Subscribed states		
Available		The contact is online, available on one or more devices, and not busy on any device.
Busy		The contact is online, but currently busy on one or more devices. Do not disturb.
Away		The contact is connected but away from one or more devices and not busy on any device.
Offline		The contact is offline on all devices.
Unsubscribed states		
Pending Subscription		You sent a subscription request to the contact, but it has not yet been accepted. Clicking the icon resends the request.
Not subscribed		The contact has the IM&P service but you are not subscribed to monitor their state. The contact does not appear in the *Instant Message* tab. Clicking this icon sends a subscription request to the contact.

CHAT WITH IM&P CONTACTS

You can chat with more than one contact at the same time, either in one-on-one sessions or by participating in multiuser chats. Each session requires a separate window.

Chat windows appear at the bottom-right hand side of the Receptionist main interface. Subsequent windows open to the left of the latest opened *Chat* window.

Chat windows can be taken out of the main interface and placed elsewhere on the screen.

The number of concurrently open *Chat* windows depends on the browser window size and screen resolution. The oldest *Chat* window is closed when there is no more room for a new *Chat* window to open. This only applies to *Chat* windows that are placed within the main interface.

You can start a chat session with a contact or accept a request from another user. A one-on-one session can be converted into a multiuser chat by inviting more participants. You can also receive an invitation to a multiuser chat from another user.

When your IM&P contact is in your group/enterprise, you can phone them directly from the *Chat* window.

The tasks related to instant messaging are described in the following sections:

- Start Instant Messaging Session
- Place Call from Chat Window
- Establish Multi-User Chat Session
- Manage Instant Messaging Sessions

START INSTANT MESSAGING SESSION

You can start an instant messaging session with an IM&P contact from any of the following directories: *Instant Message, Enterprise/Group*, *Favorites*, *Custom,* and *Search*.

To start an instant messaging session with a contact:

1. In the *Contacts* pane, click the target contact. The entry expands displaying available action buttons.

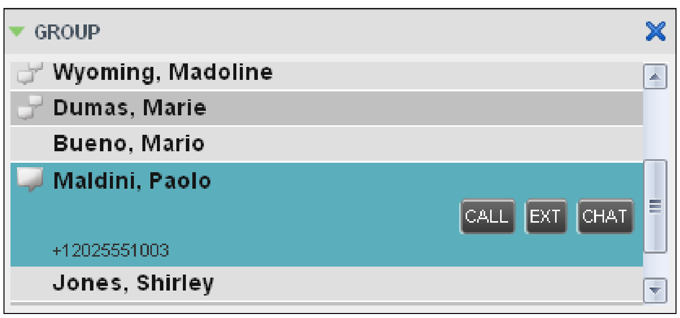


Figure 59 IM&P Contact with Chat button

2. Click **Chat** 

 on the line for the contact. A *Chat* window appears, displaying your contact's information on the title bar.

Figure 60 Chat Window

Note: A *Chat* window also appears when another IM&P user initiates a chat session with you.

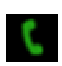
3. Type your message in the text box at the bottom of the window and click ENTER on the keyboard. Your message is sent to your contact.

The messages you send and receive appear in the *Chat Logs* area at the top of the window, below the title bar. Up to 50 messages per contact are kept in the log for the duration of your IM&P session, even if you close the *Chat* window and later start exchanging messages again with the same contact. The messages are cleared when you go offline.

PLACE CALL FROM CHAT WINDOW

If the user with whom you are chatting is also a contact in your *Group/Enterprise* directory, you can call the contact directly from the *Chat* window.

To place a call from the *Chat* window:

Click the **Call** button  at the top right-hand side of the *Chat* window.

The Receptionist client issues a Click-To-Dial attempt to the contact's phone number and the call appears in the *Call Console*.

ESTABLISH MULTI-USER CHAT SESSION

You can invite other contacts to your chat session, thus converting your one-on-one chat to a multi-user chat. An incoming multi-user chat invitation opens a window for a new multi-user chat.

To add users to a chat:

1. Click the **Add User to Chat** button in the *Chat* window. A drop-down list of available contacts appears.

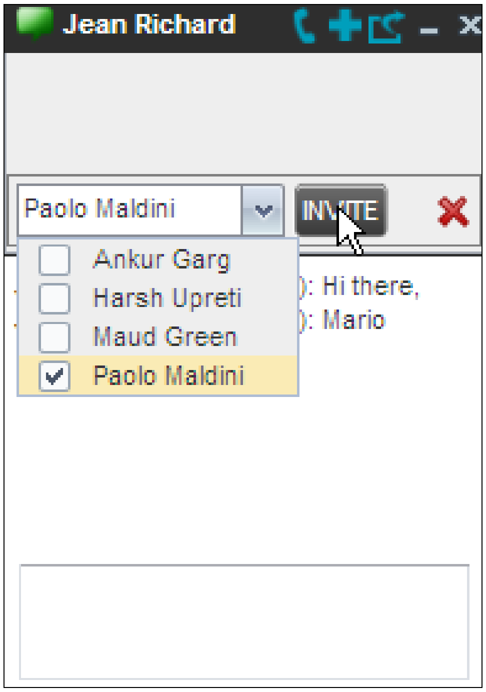


Figure 61 Add Participants to a Chat

2. Select the check box next to each contact to invite and then click the **Invite** button. When a contact joins the chat, a notification appears in the *Chat Logs* area of the *Chat* window. The participants (other than you) are also listed at the top of the window.

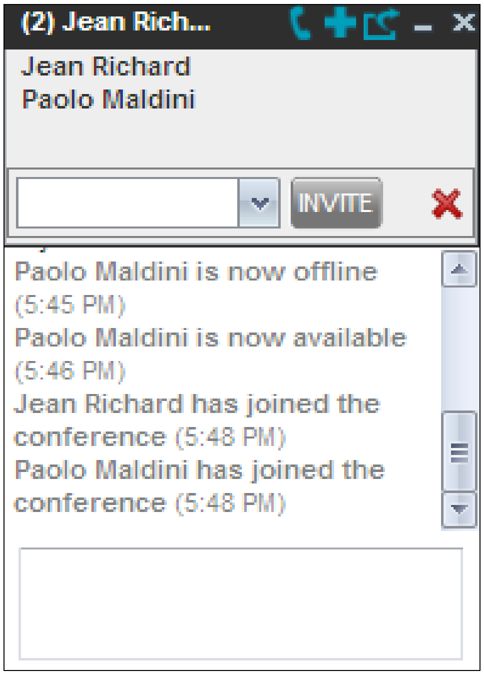


Figure 62 Multiuser Chat

3. To leave the multi-user chat, close the *Chat* window.

MANAGE INSTANT MESSAGING SESSIONS

If a *Chat* window is not in focus and an incoming message is available for you to read, the color of the window is light brown as shown in the following figure. This changes back to black as soon as the window is in focus.

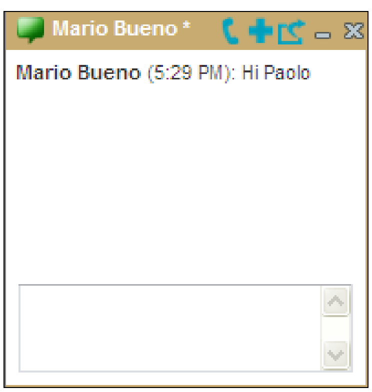


Figure 63 Chat Window

You can also close, minimize, or pop out a *Chat* window, that is, take the *Chat* window out of the Receptionist main interface and place in elsewhere on the desktop.

To pop out a *Chat* window:

Click the **Pop-out** button  at the top right-hand side of the window.

The window is placed on the desktop outside of Receptionist main interface and the Pop-out button becomes the Pop-in button.

To place the window back within the Receptionist main interface:

Click the **Pop-in** button  at the top right-hand side of the window.

To minimize or close a *Chat* window:

Click the **Minimize** or **Close** button at the top right-hand side of the window. When a window is closed, the windows to the left (if present) shift to the right. This only applies to *Chat* windows that are placed within the Receptionist main interface.

MANAGE CONTACTS

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

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

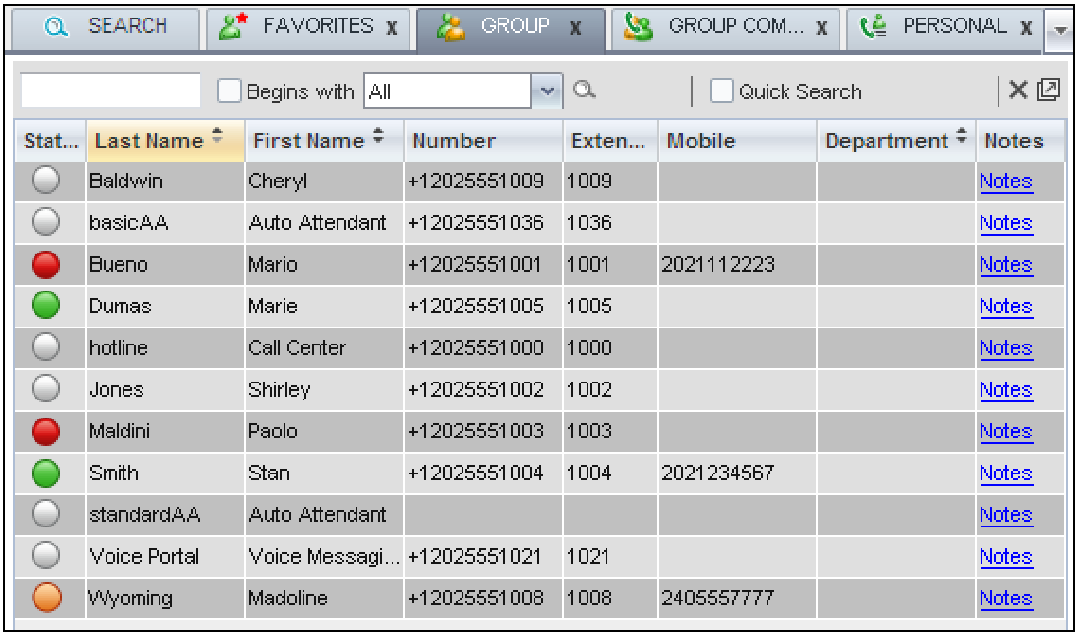


Figure 64 Contacts Pane

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

For information on monitoring contacts, see section *Monitor Contacts*; for information on managing IM&P contacts, see section *Monitor IM&P Contacts*; for information on call-related functions, see section *Manage Calls*.

SHOW/HIDE DIRECTORIES

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

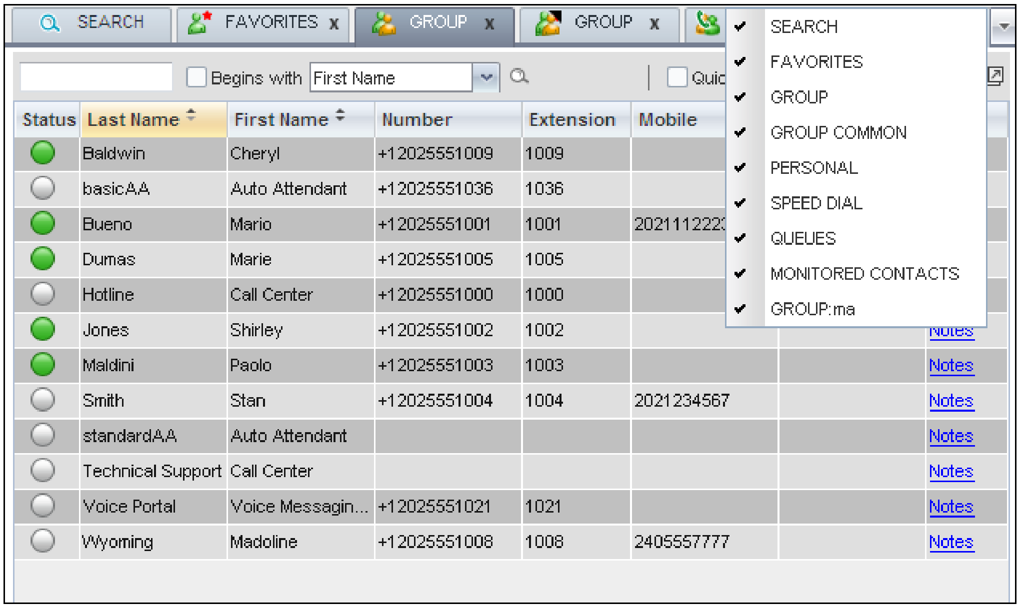


Figure 65 Contacts Pane – Expanded Directories List

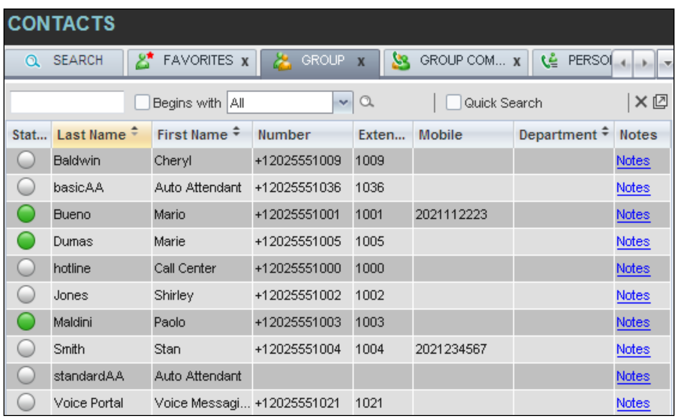
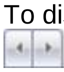


Figure 66 Contacts Pane with Contact Tabs Scroll Arrows

To display or hide a directory tab in the Contacts pane:

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

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

   Note that once you close a directory containing search results, you cannot display it again by selecting it from the list.
3. To display a directory tab that is selected but not visible, click one of the scroll arrows  to move left or right until the directory tab you are looking for becomes visible.

VIEW DIRECTORY CONTENT

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

To view contacts in a directory:

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

To view additional information about a contact:

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

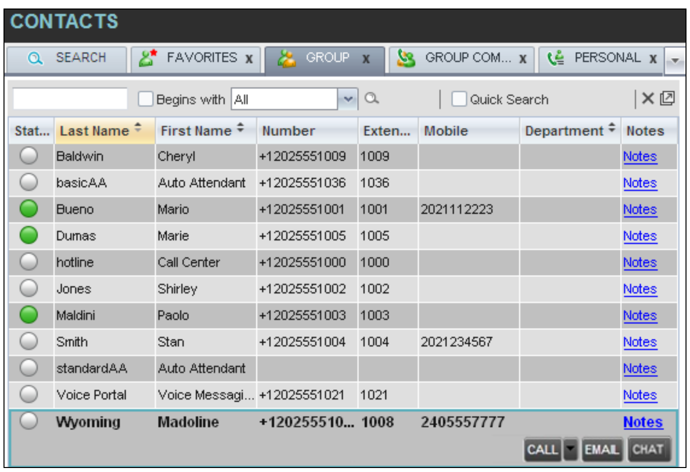


Figure 67 Group Directory – Contact Details

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

SEARCH CONTACTS

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

You use the following procedures to search for contacts:

- Perform Quick Search
- Perform Regular Search

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

PERFORM QUICK SEARCH

A quick search searches on a specific column in a selected directory for entries that start with a character entered by you. The column on which the search is performed is the column by which the directory is currently ordered.

A quick search can be performed on any directory, but is not available in the *Search* tab.

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

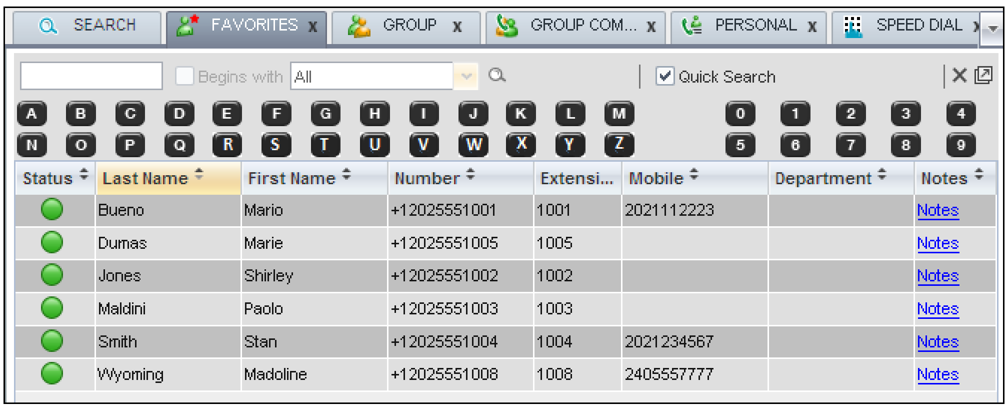


Figure 68 Contacts Pane – Perform Quick Search

To perform a quick search:

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

PERFORM REGULAR SEARCH

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

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

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

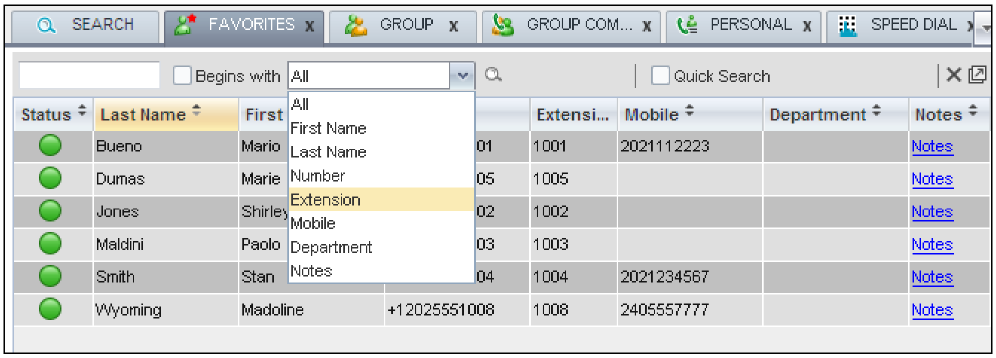
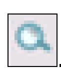


Figure 69 Contacts Pane – Perform Regular Search

To search in a specific directory:

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

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

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

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

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

   Duplicate search results in other directories are displayed.

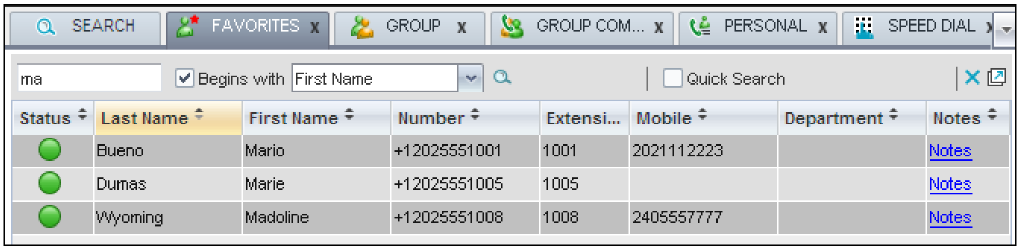


Figure 70 Contacts Pane – Search Results

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

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

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

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

To search in all directories:

1. Click the **Search** tab.

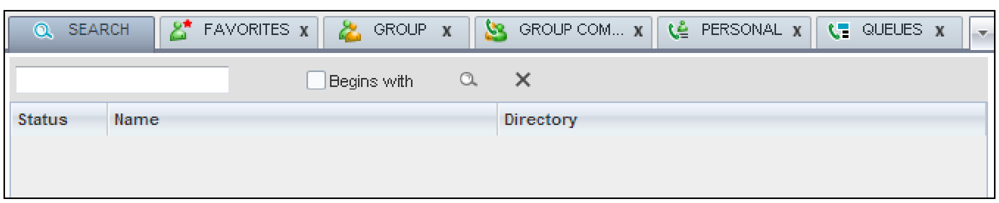
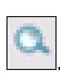


Figure 71 Perform Search Using Search Tab

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

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

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

4. Click the **Search** button .

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

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

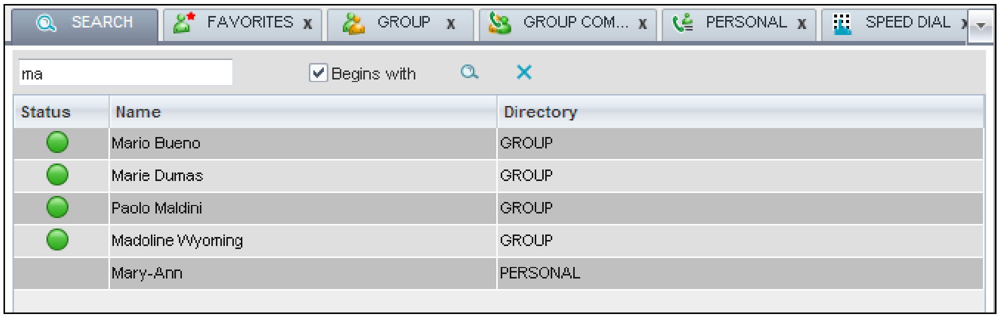


Figure 72 Contacts Pane – Search Results in Search Tab

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

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

CREATE DIRECTORY FROM SEARCH RESULTS

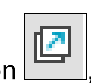
When you perform a search in a directory, you can create a new directory from the search results, using the Pullout button. The button is enabled when a search is performed on a single field.

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

To create a directory from search results:

1. Select the directory where you want to perform the search.

2. Perform a quick search or enter the search criteria.

3. When the results are displayed, click the **Pullout** button , which becomes active. A new tab is created containing the results of the search.

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

PERFORM SEARCH ON SEARCH RESULTS

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

To perform a search on search results:

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

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

ORDER DIRECTORY ENTRIES

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

DIRECTORY	SORT COLUMNS	DEFAULT SORT COLUMN
Enterprise/Group	First Name, Last Name, Department	Last Name
Favorites	First Name, Last Name, Number, Mobile, Extension, Notes, Department, Status, IM, Title	Last Name
Group/Enterprise Common	Name, Number	Name
Personal	Name, Number	Name
Speed Dial	Code, Description, Number	Code
Queues	Name, Number, Extension, Department	Name
Custom	First Name, Last Name, Department	Last Name
Outlook	Last Name, First Name, Number, Mobile, Home Phone	Last Name
Instant Message	Name, IM ID, IM	Name
Monitored Contacts	First Name, Last Name, Number, Mobile, Extension, Notes, Department, Status, IM, Title	Last Name

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

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

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

To order a directory:

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

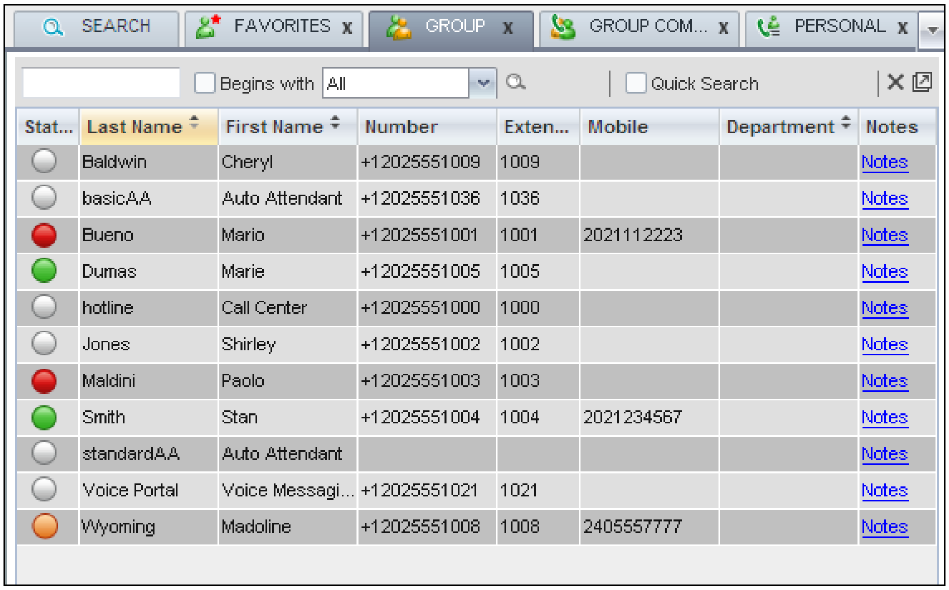


Figure 73 Sort Directory

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

MAKE NOTES ABOUT CONTACT

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

To make a note about a contact:

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

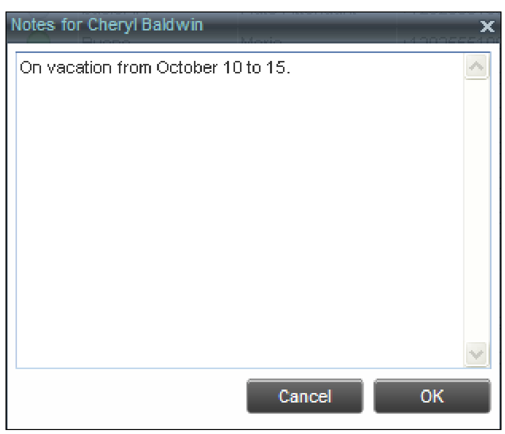


Figure 74 Notes for Cheryl Baldwin Dialog Box

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

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

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

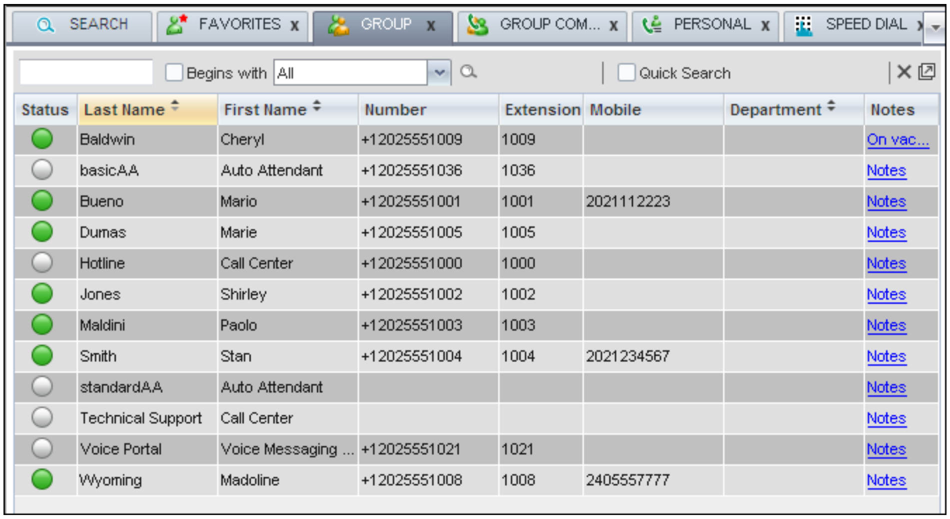


Figure 75 Group Directory – Contact Notes

MANAGE PERSONAL CONTACTS

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

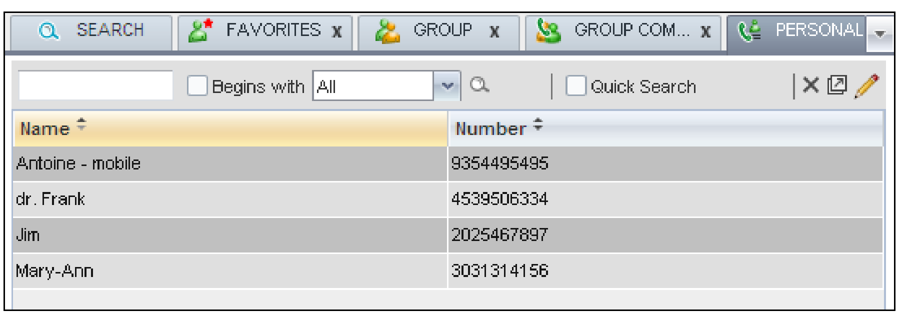


Figure 76 Personal Tab

You can perform the following operations on personal contacts:

- Add Personal Contact
- Delete Personal Contact

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

ADD PERSONAL CONTACT

To add a personal contact:

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

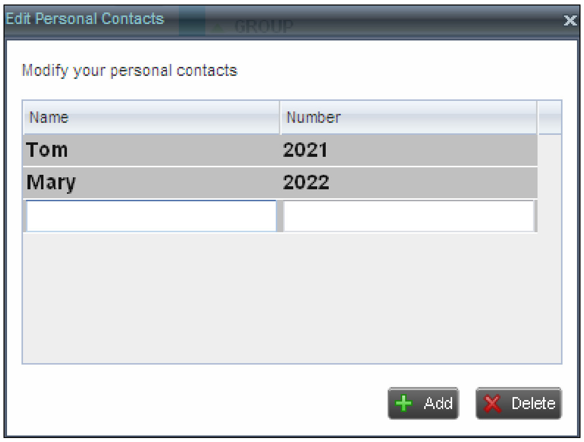


Figure 77 Edit Personal Contacts Dialog Box – Add Entry

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

DELETE PERSONAL CONTACT

To delete a speed dial entry:

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

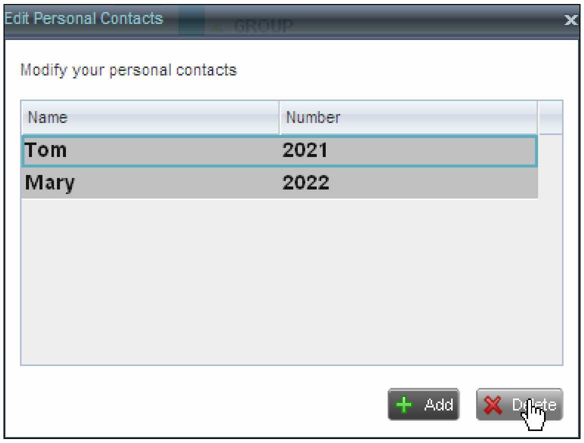


Figure 78 Edit Personal Contacts Dialog Box – Delete Entry

MANAGE SPEED DIAL ENTRIES

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

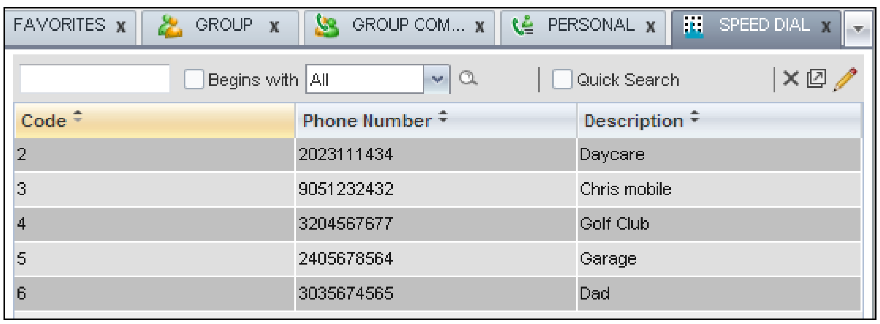


Figure 79 Speed Dial Tab

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

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

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

ADD SPEED DIAL ENTRY

To add a speed dial entry:

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

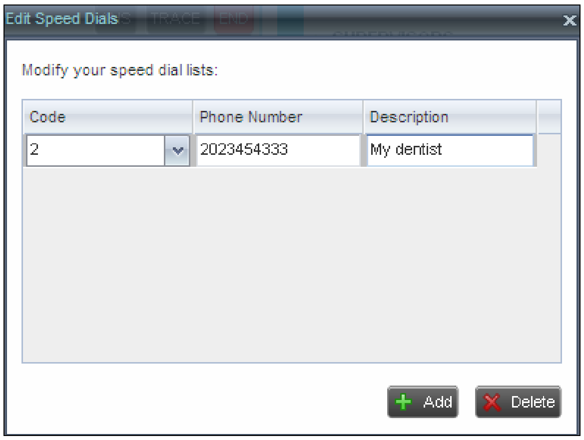


Figure 80 Edit Speed Dials Dialog Box – Add Entry

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

MODIFY SPEED DIAL ENTRY

To modify a speed dial entry:

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

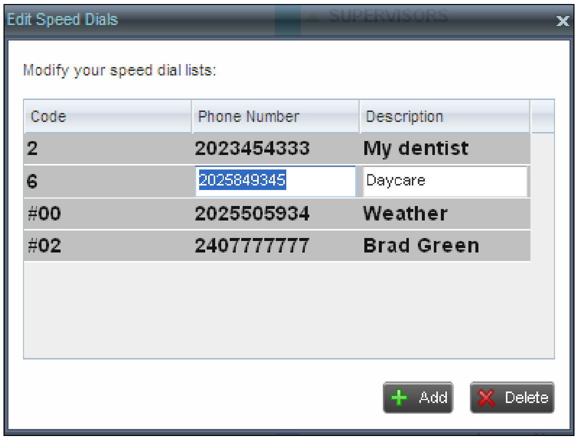


Figure 81 Edit Speed Dials Dialog Box – Modify Entry

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

DELETE SPEED DIAL ENTRY

To delete a speed dial entry:

1. In the *Speed Dial* tab, click **Edit** . The *Edit Speed Dials* dialog box appears.
2. Select the entry to delete and click **Delete**.

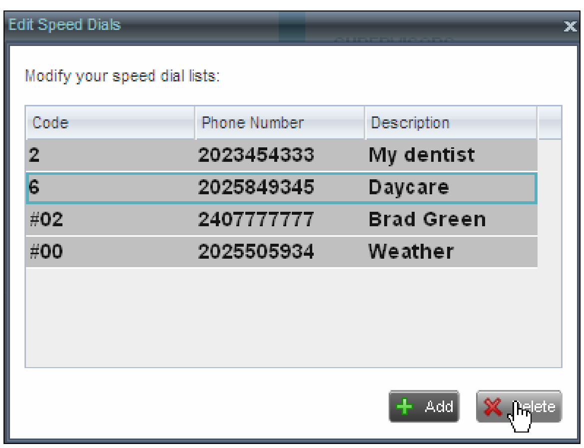


Figure 82 Edit Speed Dials Dialog Box – Delete Entry

MONITOR CONTACTS

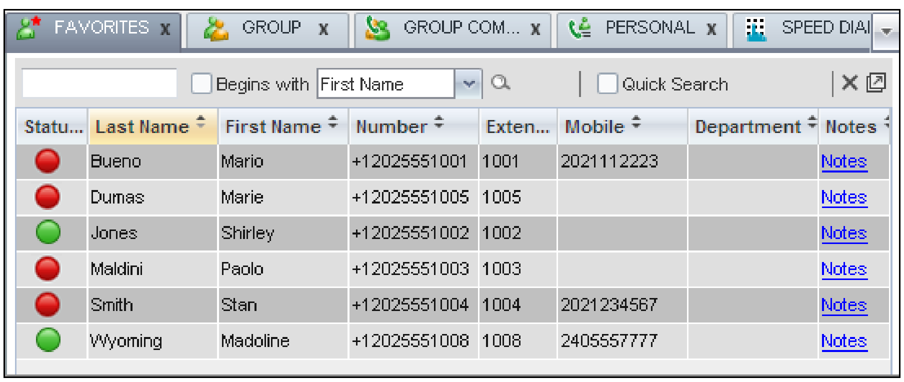
Receptionist allows you to monitor the call state of selected contacts. Receptionist allows you to monitor contacts configured through the web portal. This is referred to as static monitoring. In addition, Receptionist Enterprise allows you to monitor selected contacts dynamically.

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

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

STATIC MONITORING

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



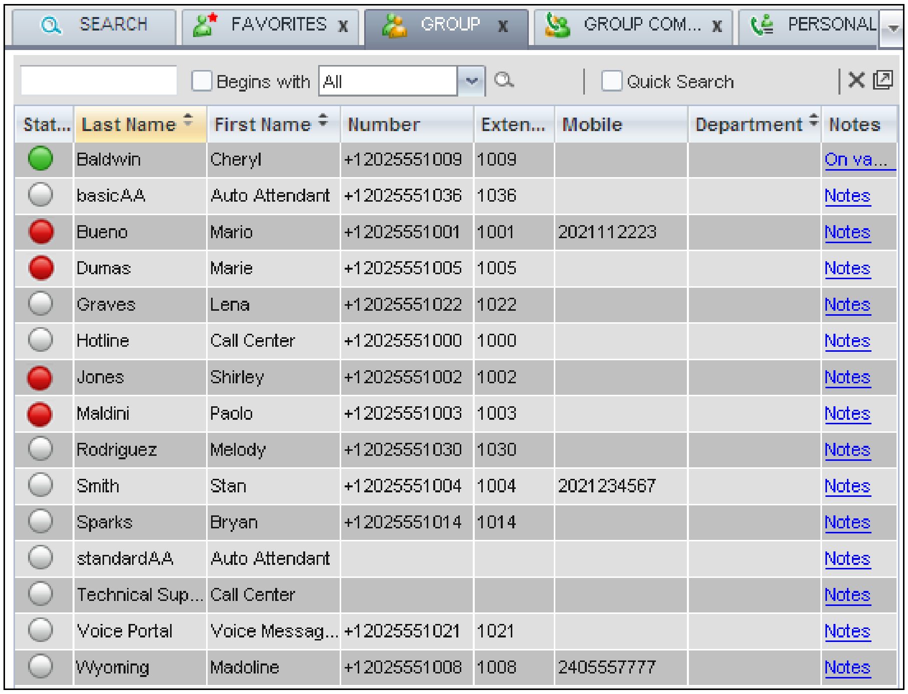
Statu...	Last Name	First Name	Number	Exten...	Mobile	Department	Notes
	Bueno	Mario	+12025551001	1001	2021112223		Notes
	Dumas	Marie	+12025551005	1005			Notes
	Jones	Shirley	+12025551002	1002			Notes
	Maldini	Paolo	+12025551003	1003			Notes
	Smith	Stan	+12025551004	1004	2021234567		Notes
	Wyoming	Madoline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

Figure 83 Favorites Directory with Monitored Contacts

DYNAMIC MONITORING

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

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


SEARCH FAVORITES x GROUP x GROUP COM... x PERSONAL

Begins with All Quick Search

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

Figure 84 Group Directory with Monitored Contacts

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

REQUEST DYNAMIC MONITORING

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

To monitor a contact:

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

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

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

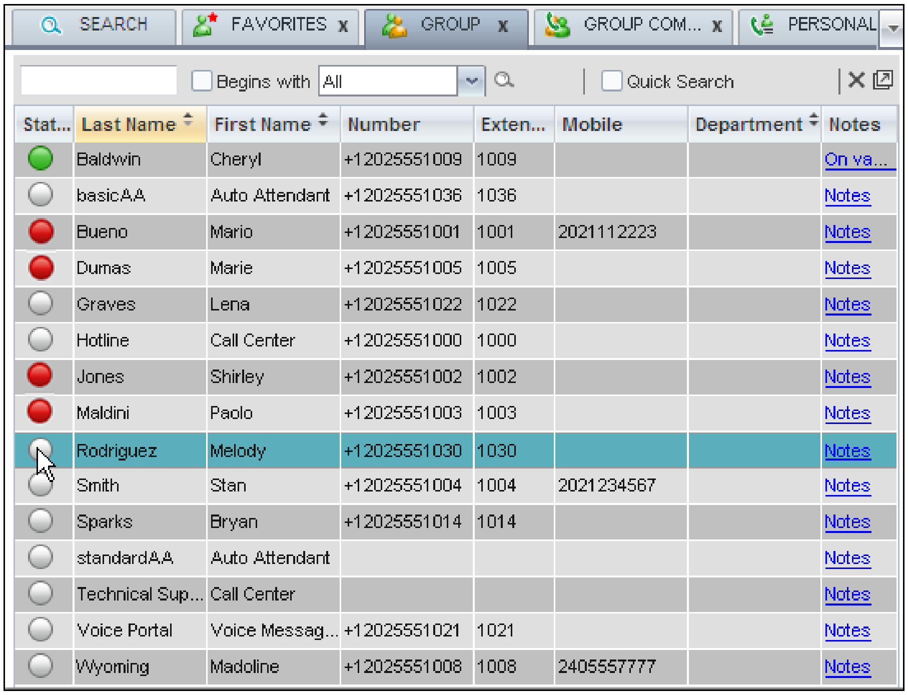


Figure 85 Group Directory – Requesting Contact Monitoring

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

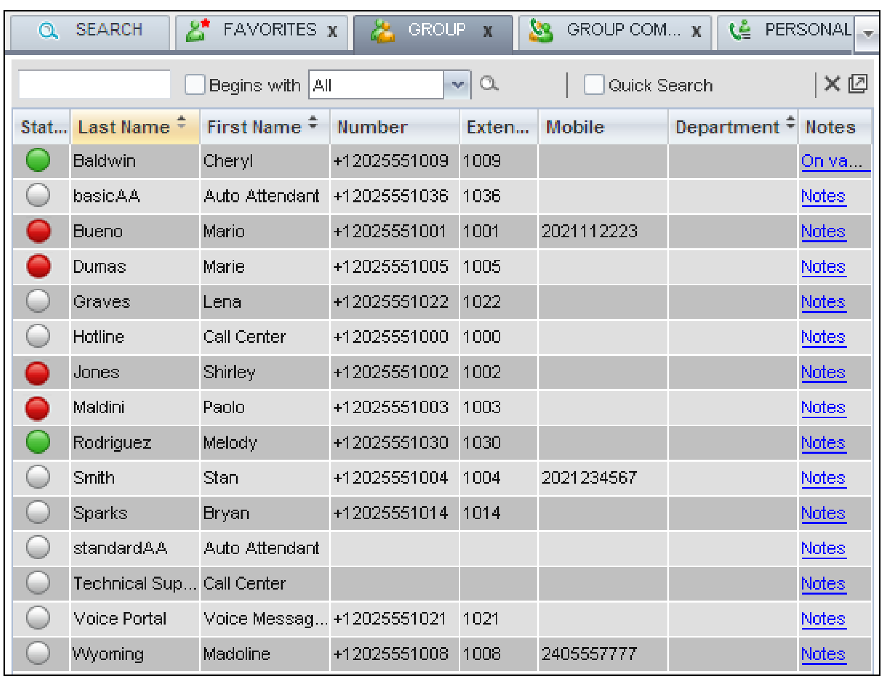


Figure 86 Group Directory – Monitored Contact

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

Figure 87 Dynamic Unmonitoring Dialog Box

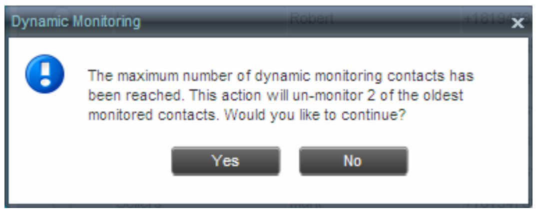


Figure 88 Dynamic Monitoring Dialog Box

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

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

MONITORED CONTACT'S CALENDAR

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

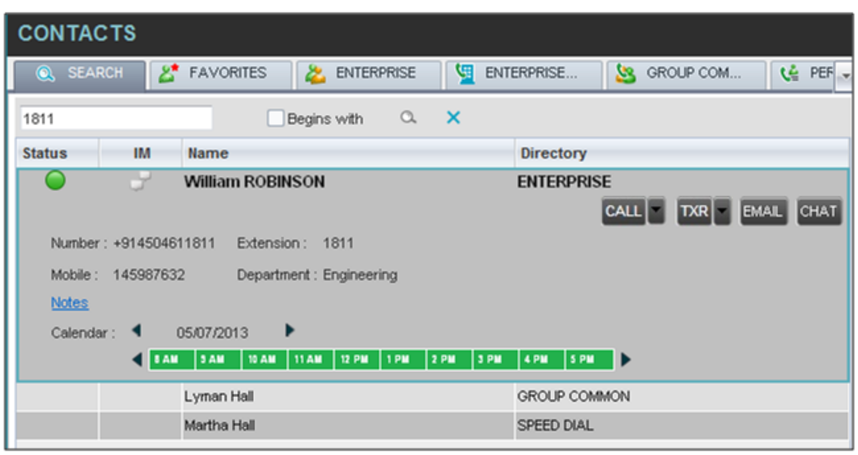


Figure 89 Contacts Pane – Monitored User's Calendar Details

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

By default the calendar displays the time between 8:00 AM and 6:00 PM for the current day. You can change the date and the time displayed on the calendar, by using the Back ◀ and Forward ▶ buttons. Clicking the button shifts the displayed time period by one day/hour.

The calendar details are displayed in the time zone of your local machine.

MONITORED CONTACT'S PERSONAL ASSISTANT STATE

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

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

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

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

CONTACT STATES

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

ICON	STATE IN RECEPTIONIST	DND	CFA	PRIVACY	EXCHANGE CALENDAR	PERSONAL ASSISTANT	CALL STATE
	Private	N/A	N/A	On	N/A	N/A	N/A
	On a Call	N/A	N/A	Off	N/A	N/A	Active call
	Ringing	N/A	N/A	Off	N/A	N/A	Ringing call, no active calls
	Away	N/A	N/A	Off	Out of Office	N/A	No active calls
	Away	N/A	N/A	Off	Free or Tentative	Any state except None, Meeting, or Training,	No active calls
	In a Meeting	N/A	N/A	Off	Busy	N/A	No active calls
	In a Meeting	N/A	N/A	Off	Free or Tentative	Meeting or Training	No active calls
	Call Forwarding Always	N/A	On	Off	Free or Tentative	N/A	No active calls
	Do Not Disturb	On	Off	Off	Free or Tentative	N/A	No active calls
	Available	Off	Off	Off	Free or Tentative	None	No active calls

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

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

TOOLTIP MESSAGE	STATE IN RECEPTIONIST	ADDITIONAL CONDITIONS
Private	Private	
On a Call	On a Call	
Ringing	Ringing	
Away	Away	Contact's calendar shows Out of Office
<Contacts's first an last name> is on a business trip/gone for the day/at lunch/out of the office/temporarily out/on vacation/unavailable [until <date/time>]	Away	Contact's calendar shows Free or Tentative and their Personal Assistant is set to any state except None, Meeting, or Training
In a Meeting	In a Meeting	Contact's calendar shows Busy
<Contacts's first an last name> is in a meeting/training [until <date/time>]	In a Meeting	Contact's calendar shows Free or Tentative and their Personal Assistant is set to Meeting or Training
Call Forwarding Always	Call Forwarding Always	
Do Not Disturb	Do Not Disturb	
Available	Available	

MANAGE CALL HISTORY

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

VIEW CALL HISTORY

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

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

To view your call history:

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

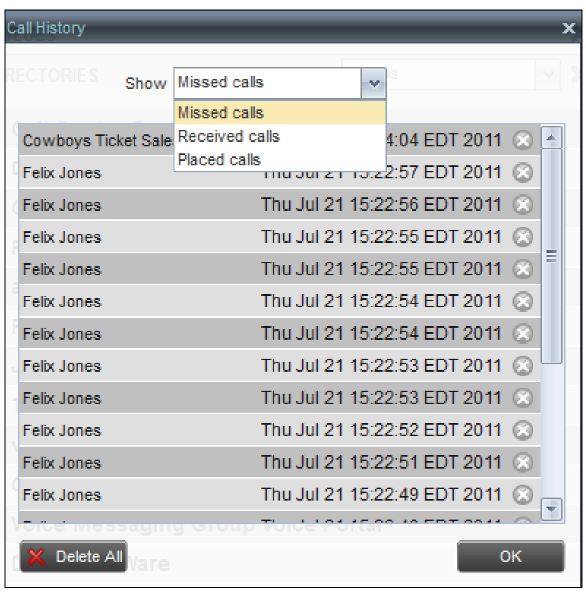


Figure 90 Call History Dialog Box

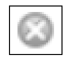
2. To show calls in a specific group, select that group from the *Show* drop-down list.

DELETE CALL HISTORY

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

To delete call logs from Call History:

1. In the *Call Console*, click the **Call History** button . The *Call History* dialog box appears.
2. To delete all call logs, click **Delete All** 

.
3. From the *Show* drop-down list, select a grouping.
4. To delete a selected log, click **Delete Call Log**  for that log.

MANAGE QUEUED CALLS

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

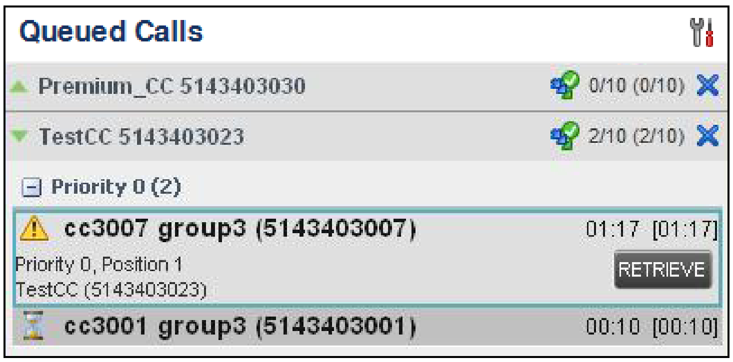


Figure 91 Queued Calls Pane

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

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

SELECT CALL CENTERS TO MANAGE

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

To select call centers:

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

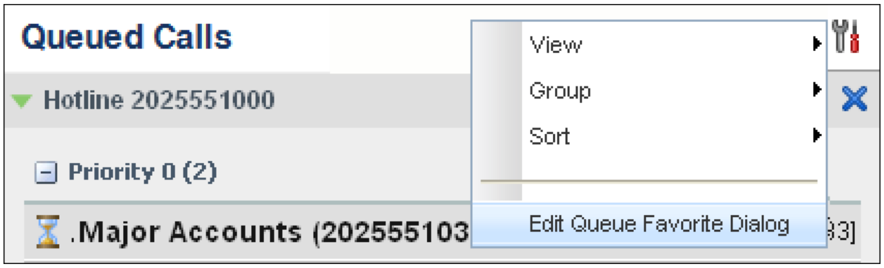


Figure 92 Queued Calls – Options – Edit Queue Favorite Dialog.

The *Edit Queue Favorites* dialog box appears.

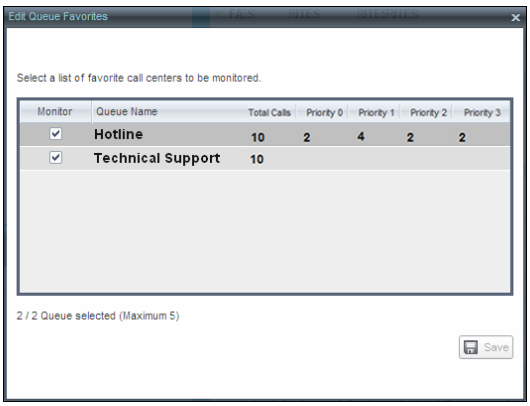


Figure 93 Edit Queue Favorites Dialog Box

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

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

MODIFY NUMBER OF CALLS TO DISPLAY

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

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

VIEW QUEUED CALLS

To view calls in a queue:

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

RETRIEVE CALL FROM QUEUE

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

To retrieve a call from the queue:

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

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

TRANSFER CALL TO AD HOC NUMBER

To transfer a call to an ad hoc number:

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

Figure 94 Ad Hoc Queue Transfer

The call is transferred and removed from the queue.

TRANSFER CALL BETWEEN QUEUES

To transfer a call to another queue:

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

   The call is transferred and removed from the original queue.

CHANGE POSITION OF CALL IN QUEUE

To change the position of a call in the queue:

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

.

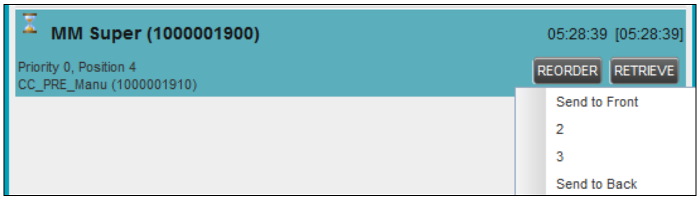


Figure 95 Reordering Queued Call

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

   The call is placed at the new position.

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

TRANSFER CALL TO TOP OF QUEUE (PREMIUM CALL CENTER)

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

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

1. In the *Queued Calls* pane, click the target call to expand it.
2. Click **Reorder** 

 and select *Send to Front* from the list that appears.

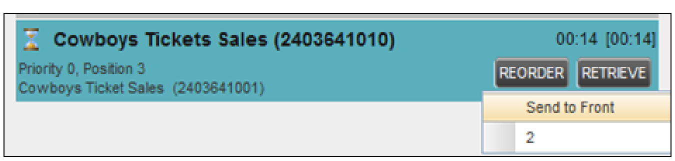


Figure 96 Transferring Call to Top of Queue

PROMOTE CALL IN QUEUE (PREMIUM CALL CENTER)

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

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

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

.

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

GROUP CALLS

You can group queued calls by their priority bucket.

To group or ungroup queued calls:

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

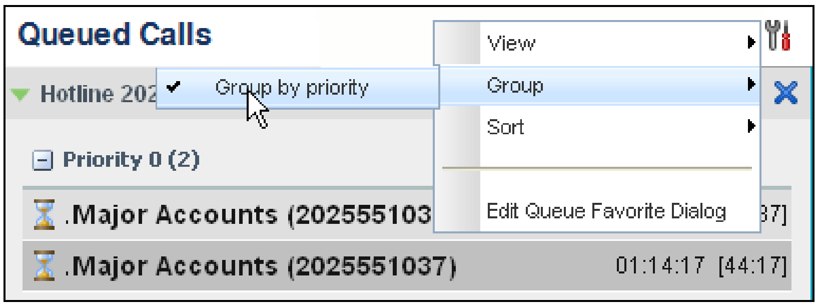


Figure 97 Queued Calls – Options – Group

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

ORDER QUEUED CALLS

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

To order queued calls:

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

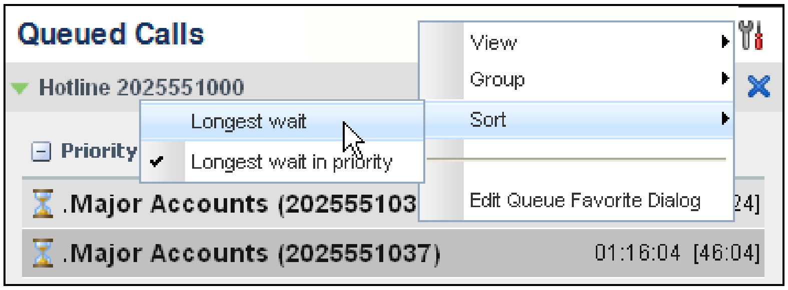


Figure 98 Queued Calls – Options – Sort

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

CONFIGURE RECEPTIONIST

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

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

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

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

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

SETTINGS – GENERAL

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

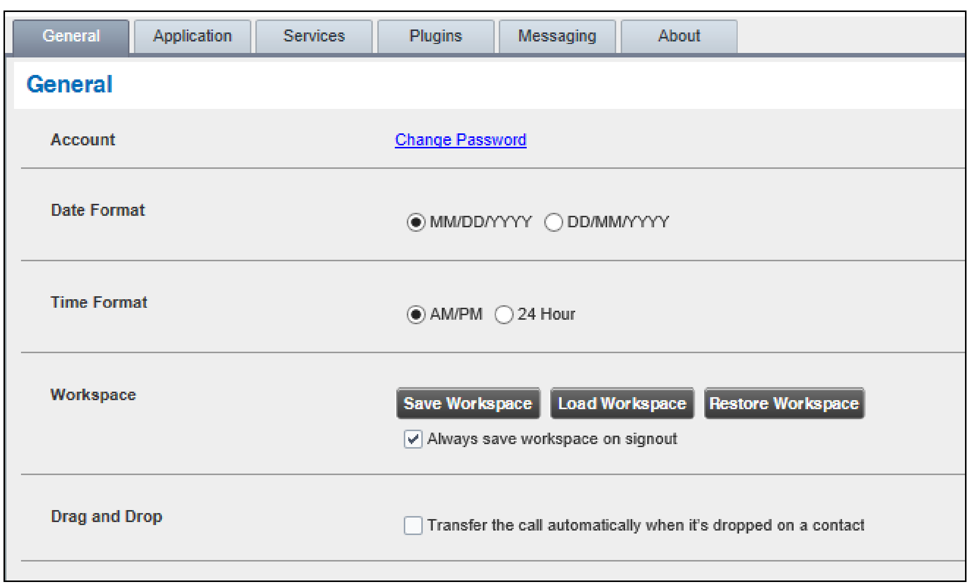


Figure 99 Setting – General

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

ACCOUNT

You use this area to change your Clearspan password.

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

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

To change your password:

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

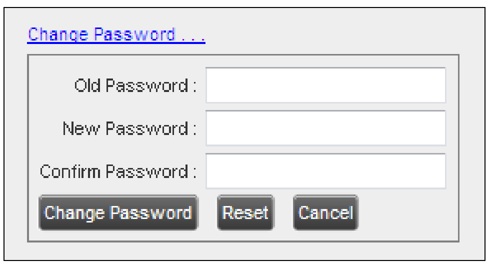


Figure 100 Account – Change Password

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

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

LANGUAGE

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

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

SCREEN POP

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

- *Enter URL* – This text box allows you to enter the URL address of the web page that Receptionist opens using the default browser when you click the Web Pop URL button in the *Call Notification* pop-up window.

- *Auto pop for Incoming Calls* – When this option is checked, Receptionist launches the Web Pop URL without your being required to click the Web Pop URL button in the *Call Notification* pop-up window for each incoming call.

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

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

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

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

- __USER__: The user's Clearspan ID (Note that in this case, the "user" is the Clearspan subscriber.)
- __FIRST__: The first name of the user
- __LAST__: The last name of the user
- __EMAIL__: The e-mail address of the user
- __GROUP__: The name of the Clearspan group to which the user belongs
- __SERVICE_PROVIDER__: The name of the Clearspan service provider to which the user belongs
- __PHONE__: The phone number of the user
- __REMOTE_PHONE__: The phone number of the remote party
- __REMOTE_NAME__: The name of the remote party (when available)
- __CALL_TYPE__: "Incoming" or "Outgoing"
- __DNIS_NAME__: The name of the DNIS on which the call was received
- __DNIS_PHONE__: The phone number of the DNIS on which the call was received
- __CLIENT_SESSION_INFO__: The client session identifier (when available)
- __EXT_TRACKING_ID__: The external tracking ID for the call
- REDIRECTED_NAME_1__ , __REDIRECTED_NAME_2__, and so on: The name of a party to whom the call was redirected prior to being delivered to you, from the most recent to the least recent
- __REDIRECTED_PHONE_1__, __REDIRECTED_PHONE_2__, and so on: The phone number of a party to whom the call was redirected prior to being delivered to you, from the most recent to the least recent
- __REDIRECTED_USERID_1__, __REDIRECTED_USERID_2__, and so on: The user ID of a party to whom the call was redirected prior to being delivered to you, from the most recent to the least recent

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

DATE FORMAT

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

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

TIME FORMAT

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

- AM/PM
- 24 hours

WORKSPACE

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

The following elements can be customized:

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

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

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

Buttons:

- *Save Workspace* – This button, when clicked, saves the current workspace.
- *Load Workspace* – This button, when clicked, arranges your workspace according to the last saved configuration.

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

To customize your workspace:

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

DRAG AND DROP

You use the *Drag and Drop* area to specify whether a call should be automatically transferred when dropped on a contact.

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

SETTINGS – APPLICATION

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

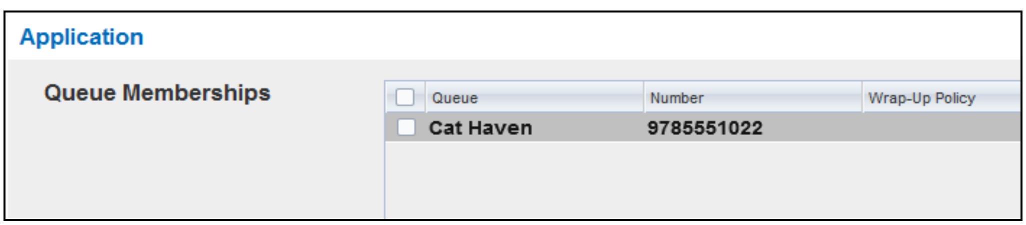


Figure 101 Settings – Application

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

QUEUE MEMBERSHIP

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

To join queues:

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

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

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

OPERATOR POLICIES

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

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

SETTINGS – SERVICES

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

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

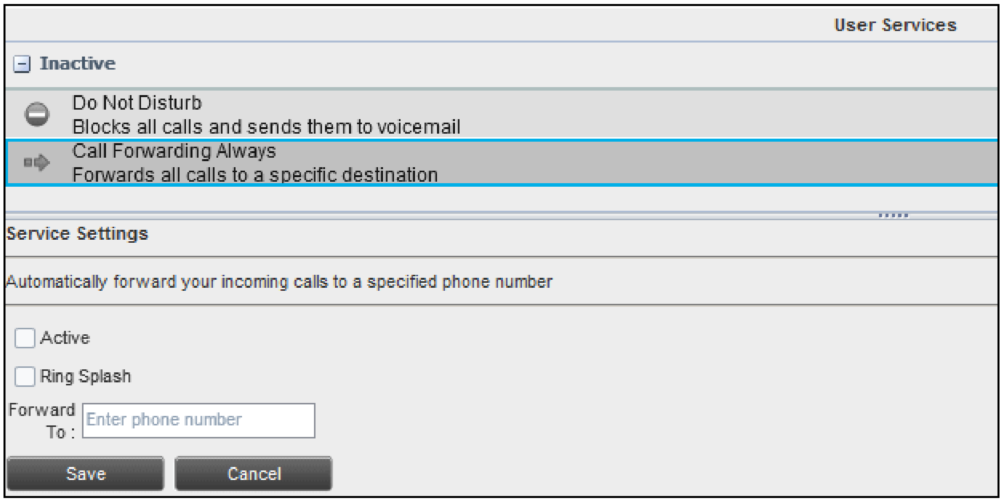


Figure 102 Settings – Services

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

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

To activate a service:

1. Select the service and check the *is Active* box. The service is moved from the *Inactive* to *Active* category.

2. If you enabled the Call Forwarding Always service, in the *Forward To* text box that appears, enter the phone number to forward the calls to.

3. To generate a ring splash for incoming calls, check the *RingSplash* option.

4. To save your changes, click **Save**.

SETTINGS – PLUG-INS

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

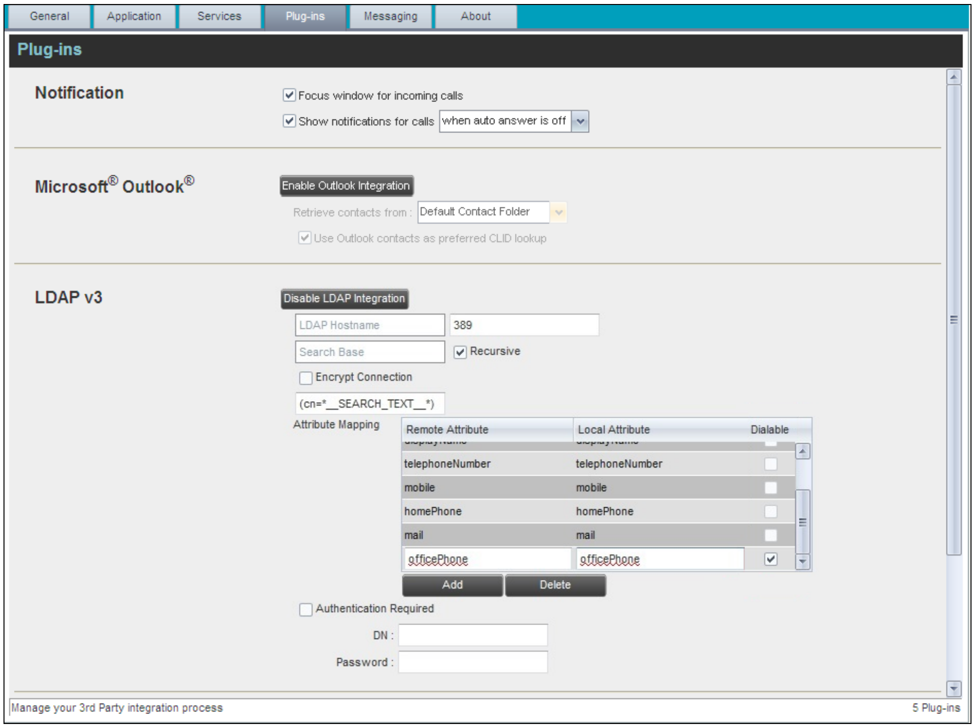


Figure 103 Settings – Plug-ins (Top of Page)

PLUG-INS

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

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

NOTIFICATION

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

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

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

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

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

MICROSOFT OUTLOOK

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

The options you can set are as follows:

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

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

LDAP V3

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

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

To import a certificate:

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

To verify the certificate:

1. Click **Start** and select *Run…*
2. Type “cmd” and click **OK**.

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

The *LDAP* directory options are as follows:

- *Enable/Disable LDAP Integration* – This determines whether Receptionist provides *LDAP* directory lookup services. Clicking the **Enable LDAP Integration** button enables the controls for LDAP settings.
- *LDAP Hostname* – This is the network address of the LDAP server.
- *LDAP Port* – This is the port number for the LDAP server. This is compulsory and can be obtained from your system administrator.
- *Search Base* – The text box determines the location in the LDAP server tree that Receptionist looks in when executing a search. The check box, when checked, searches all sub-trees within the search base until the specifications are found.
- *Encrypt Connection* – This option determines whether Receptionist uses encryption when connecting to the LDAP server. Note that if encryption is enabled, you may have to use of a different port.
- *("cn=_ _Search_ _Text")* – This option specifies an additional search filter to apply to all directory searches. For example, to include the search criteria in the filter you must include (cn=*__SEARCH_TEXT__*). Alternatively, in another example, “(telephoneNumber=*)” restricts search results to users who have a telephone number assigned.
- *Attribute Mapping* – This table controls the way that Receptionist maps attributes returned from the directory server to columns displayed in the list of search results.

  In each row of the table, do the following:

  - Enter an LDAP attribute in the *Remote Attribute* column.
  - Enter a corresponding local attribute in the *Local Attribute* column. Typical Remote Attribute values are “cn”, “sn”, “telephoneNumber”, “mobile”, “homePhone”, and “mail”.
  - For dialable attributes such as “phoneNumber” or “mobile”, check the *Dialable* box to be able to dial the number from Receptionist by simply clicking the contact.
- *Authentication Required* – When this box is checked, Receptionist must provide a user name and password to the directory server to conduct searches.
- *DN* – This is the user name Receptionist uses when connecting to the LDAP server when *Authentication Required* is checked.
- *Password* – This is the password that corresponds to the authentication *DN*.

PROGRAM SHORTCUTS

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

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

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

ACTIVITY ARCHIVE

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

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

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

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

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

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

STATISTIC	DESCRIPTION	ALLOWED VALUES	EXAMPLE VALUE
Clearspan User ID	Clearspan user ID	String	jsmith@abc.net
Call Center ID	Call Center ID for inbound queued calls only	String, null	ABCSales
Availability	Operator's *joined* state	Joined, Not Joined, null	Joined
ACD State	Operator's *ACD* state. Typically, operators should always be Available. This value cannot be changed in Receptionist.	Sign-On, Available, Unavailable, Wrap-Up, Sign-Out, null	null
Call ID	ID of the call	String, null	192.168.1.5:1

STATISTIC	DESCRIPTION	ALLOWED VALUES	EXAMPLE VALUE
Call State	State of the call	Idle, Incoming, Outgoing, Active, Held, Remote Held, Detached, Released, null	Incoming
Personality	The personality of the call. It indicates whether the user originated this call or whether the call was placed to the user.	Integer (0, 1, 2) 0 = Clearspan Originator 1 = Originator 2 = Terminator	0
Remote Name	External caller name	String or null	null
Remote Number	External caller number	String or null	5555551234
Last Redirected Name	Last redirected name	String or null	Jane Doe
Last Redirected Number	Last redirected number	String or null	null
Time	Date stamp of record	Long date/time format	2008-04-03 12:08:17.859

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

SETTINGS – MESSAGING

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

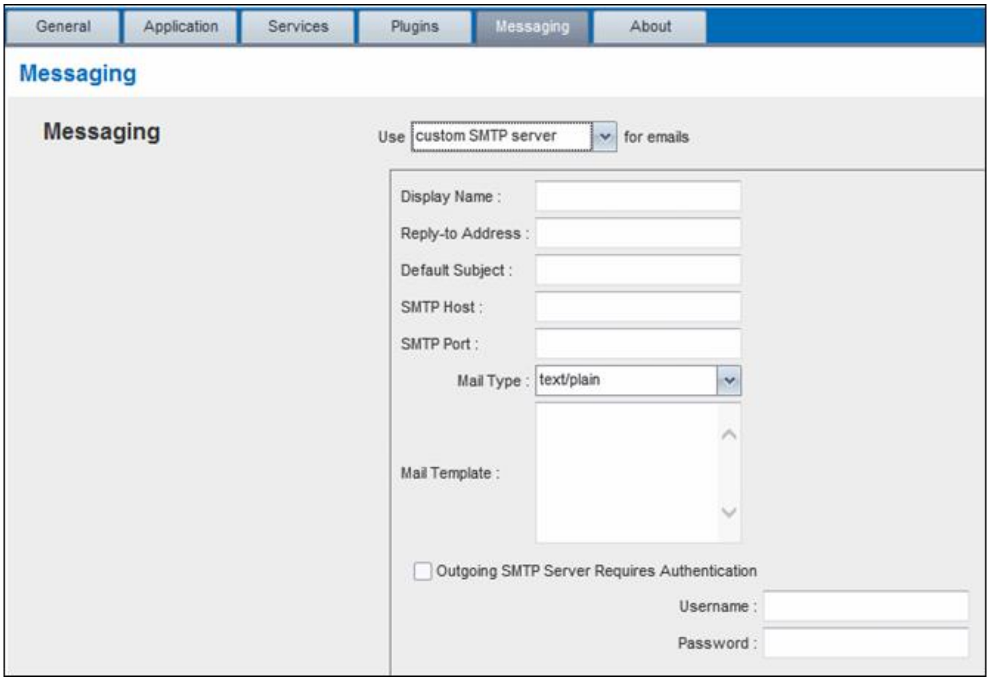


Figure 104 Settings – Messaging

MESSAGING

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

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

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

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

INSTANT MESSAGING AND PRESENCE

Check the *Open incoming instant messages in minimized windows* check box if you want the chat windows that appear when you receive an instant message to be displayed in minimized format.

SETTINGS – ABOUT

Use the About tab to view the information about Receptionist.

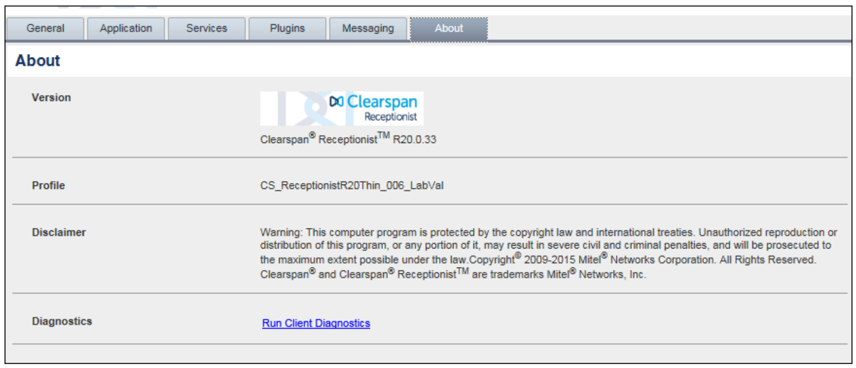


Figure 105 Settings – About Page

The following information is provided on this page:

- Version – This is the software version of the Clearspan Receptionist client.
- Profile – This is the Receptionist client profile used.
- Disclaimer – This is the Receptionist copyright Information.
- *Diagnostics* – This allows you to access the Diagnostic Tool, available in some versions of Receptionist. For more information, see *Appendix B: Diagnostic Tool*.

REQUIRED WEB BROWSER SETTINGS

FIREFOX SETTINGS QUICK LINK NAVIGATION

The following settings are required in Firefox for quick link navigation to work. If these settings are not configured, Receptionist does not change focus from the Dashboard to the main application window when the user clicks on a quick link.

1. On the Firefox Menu bar, select the Tools menu, and then click Options.
2. In the Options dialog box, click the Content tab.
3. Click the Advanced button, to the right of the to Enable JavaScript check box.

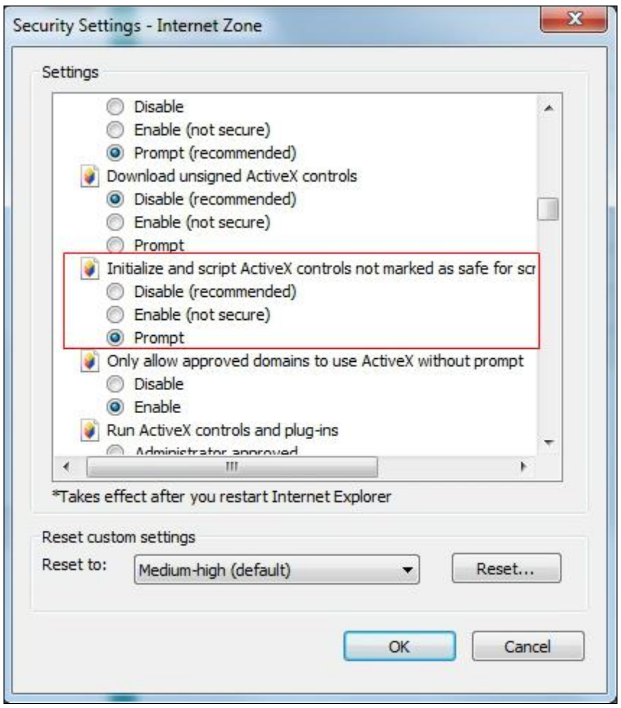
Note: If the “Enable JavaScript” option is not available, “SettingSanity” must be installed and can be found at the following location:
https://addons.mozilla.org/en-US/firefox/addon/settingsanity/

4. In the Advanced JavaScript Settings dialog box, check the Raise or lower windows box.

INTERNET EXPLORER SETTINGS

Internet Explorer must be configured as follows to enable the Full Screen link and Desktop plug-ins in the Receptionist application. Receptionist is not displayed in full-screen mode when the Full Screen link is clicked and no error message is displayed to the user.

1. On the Internet Explorer *Menu* bar, select the *Tools* menu and then click **Internet Options**.
2. In the *Internet Options* dialog box, click the **Security** tab and then click the **Custom level...** button.
3. In the *Security Settings – Internet Zone* dialog box, scroll down to *Initialize and script ActiveX controls not marked as safe for scripting* setting in the *ActiveX controls and plug-ins* section.



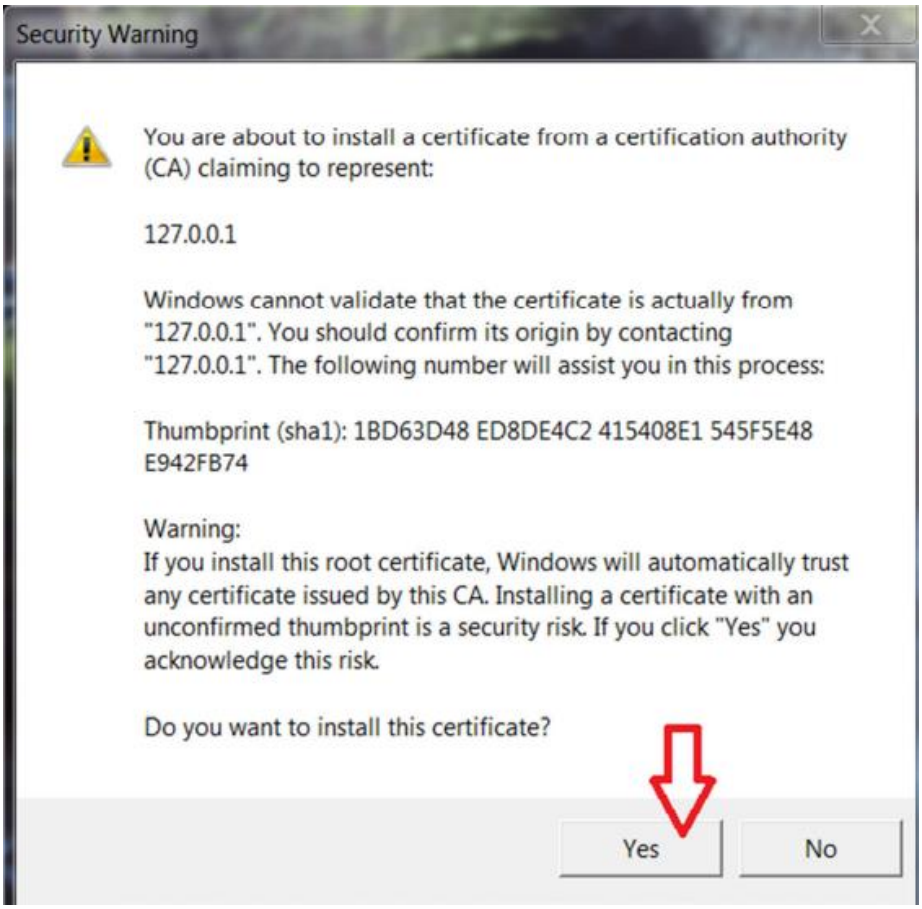
4. Select *Enable* or *Prompt.*
5. Click OK.
6. Restart Internet Explorer.

CERTIFICATE FOR DESKTOP INTEGRATION FEATURES

The desktop plug-in certificate must be added to the browser-specific certificate store location on each machine running the Receptionist client in order to run Receptionist desktop integration features; e.g. pop-up call notification, Outlook integration, and/or LDAP integration. The 21.0.33 version added an automation function to check for the presence of the plug-in certificate in the browser's Trusted Store and import the certificate if it is not present.

Internet Explorer

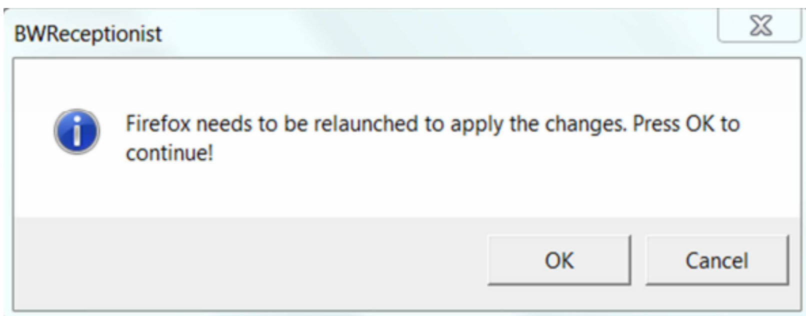
If the 'DesktopPlugin' certificate was not previously imported to the Windows Trust Store, the following pop-up appears. Click YES to install the certificate.



If the user is denied access to the certificate trust store, the following pop-up appears. Click YES to install the certificate.

Firefox

If the DesktopPlugin certificate was not previously imported to the Firefox certificate store and if the browser is open during the current session, the following message box appears. Click OK to import the certificate to Firefox.

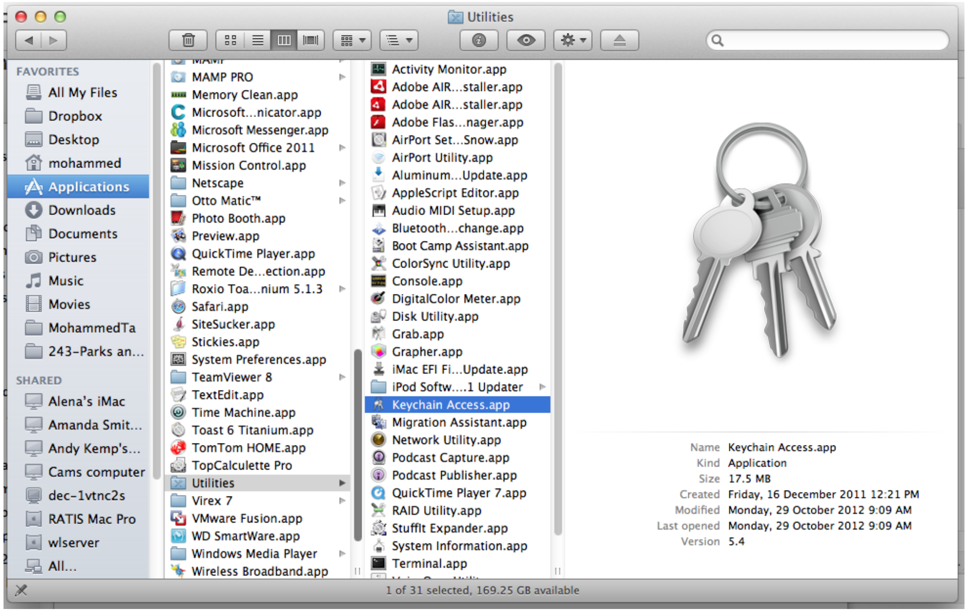


NOTE: Receptionist only verifies the last profile to see if the desktop plug-in certificate already exists. If you have multiple profiles in Firefox and plug-ins do not work, create a new profile or delete the certificate from the latest profile by navigating to Tools → Options → Advanced → View Certificate → Authorities → BroadSoft (127.0.0.1). This will import the certificate to all the profiles present.

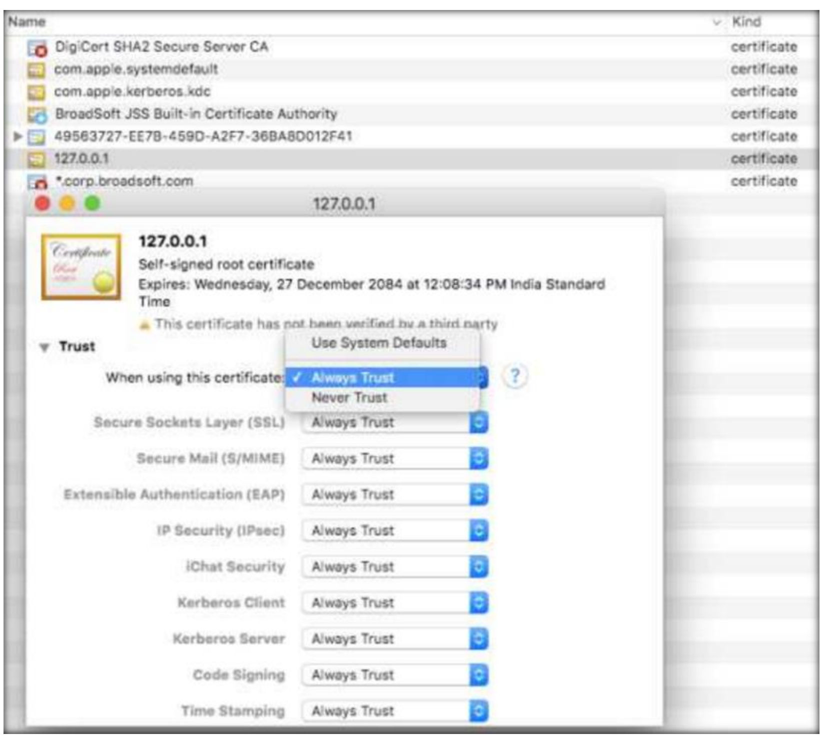
Mac

If the DesktopPlugin certificate was not previously imported to the Apple System Keychain, the certificate is automatically installed with the name “127.0.0.1.” Once the certificate is successfully added, accept the certificate as follows:

In the Dock, open Finder.



1. Select *Applications* and then *Utilities*.
2. In the list of utilities, double-click **Keychain Access**. The *Keychain Access* window appears.
3. In the *Keychain Access* window, double-click the certificate. The certificate window appears.



4. In the Trust section, select **Always Trust** for *When using this certificate*.
5. Close the browser.

TROUBLESHOOTING STEPS FOR DESKTOP PLUGINS:

- Look for any errors on the Java Console while running the downloaded jnlp file.
- Please launch the application from Internet Explorer to verify if Desktop Plugins are working correctly.
- In case plugins don’t work after all the above said steps, open a new tab and hit the following URL : https://127.0.0.1:5555/ping
- If a user has multiple profiles in Firefox browser, please note that the thin client application only verifies the last or latest profile to check if the desktop plugin certificate already exists.
- In case plugins don’t work, create a new profile or delete the certificate from the latest profile by navigating to Tools → Options → Advanced →View Certificate → Authorities → BroadSoft (127.0.0.1). This will import the certificate to all the profiles present.

RESTRICTIONS AND LIMITATIONS

JNLP DOWNLOAD

As you sign to Receptionist, a JNLP file is downloaded and you are asked to click the link shown in the browser. Due to security restrictions, the application may not run. If this occurs, perform the steps specified in the following subsections.

Note: You should run Java JRE 1.6 or higher.

ON MAC OS X

In MAC OS X, due to security-related restrictions, the JNLP may not execute even if you click on it. If this occurs, perform the following steps:

1. Open System Preferences and select Security and Privacy. The Security & Privacy window appears displaying the General tab.

Figure 106 Mac OS X – Security & Privacy

2. Unlock the panel with the lock icon.
3. In the Allow *applications downloaded from* section, select *Anywhere*.

IN INTERNET EXPLORER

If you are running Internet Explorer, you must perform the following steps to run JNLP.

Note: You must run Receptionist over HTTPS with Internet Explorer.

1. From the Internet Explorer *Menu* bar, select *Tools* and then *Internet Options*. The *Internet Options* window appears.

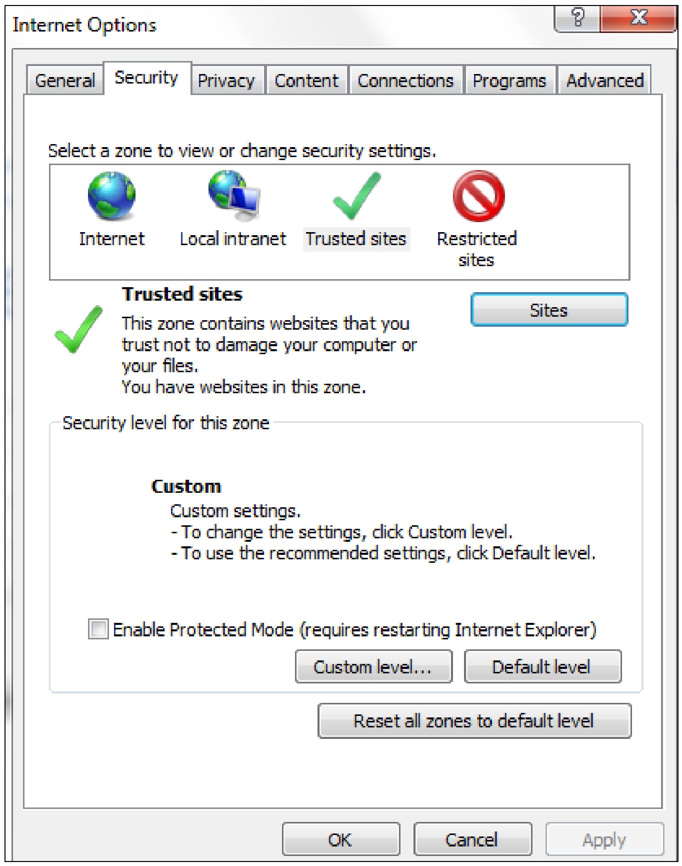


Figure 107 Internet Explorer – Internet Options – Security

2. Click the **Security** tab.
3. Click **Trusted sites** and then click **Sites**. The *Trusted sites* window appears.

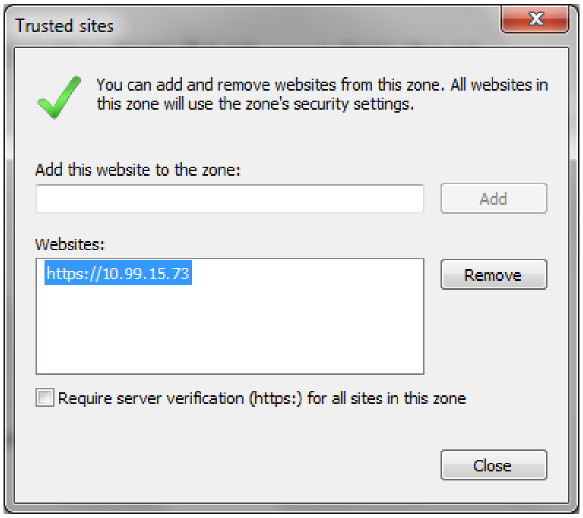


Figure 108 Internet Explorer – Trusted Sites

4. In the *Add this website to the zone* text box, enter the Receptionist client URL and then click **Add**. The URL appears in the Websites box.
5. Click **Close**.
6. In the *Internet Options* window, click **Custom level**. The *Security Settings – Trusted Sites Zone* window appears.

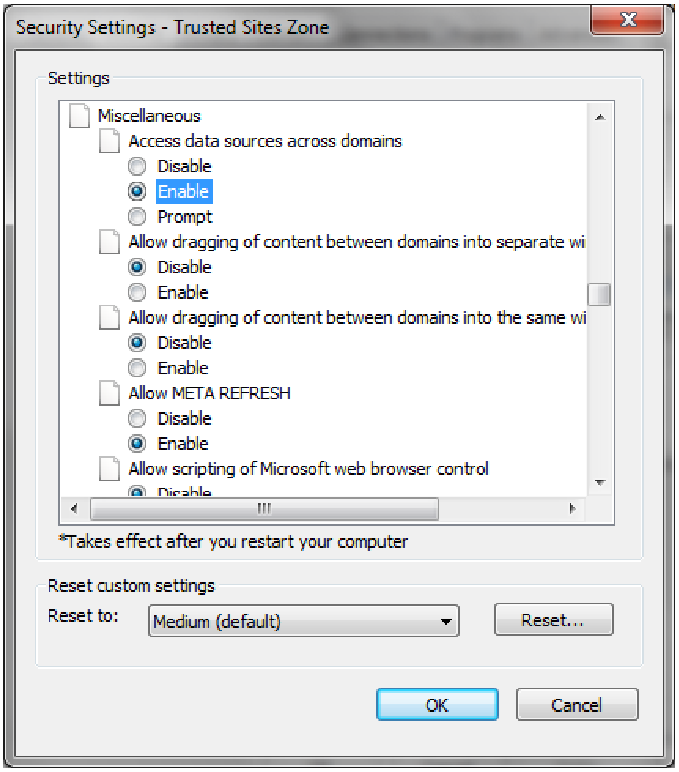


Figure 109 Internet Explorer – Security Settings – Trusted Sites Zone

7. Scroll to the Miscellaneous settings section and select Enable for the Access data sources across domains.
8. Click **Yes** in the Warning! window that appears.
9. Click **OK** and then click **OK** in the Internet Options window.

APPENDIX A: GLOSSARY AND DEFINITIONS

MONITORED USER STATES

The following table lists the possible states for monitored users.

ICON	STATE IN RECEPTIONIST	DND	CFA	PRIVACY	EXCHANGE CALENDAR	PERSONAL ASSISTANT	CALL STATE
	Private	N/A	N/A	On	N/A	N/A	N/A
	On a Call	N/A	N/A	Off	N/A	N/A	Active call
	Ringing	N/A	N/A	Off	N/A	N/A	Ringing call, no active calls
	Away	N/A	N/A	Off	Out of Office	N/A	No active calls
	Away	N/A	N/A	Off	Free or Tentative	Any state except None, Meeting, or Training,	No active calls
	In a Meeting	N/A	N/A	Off	Busy	N/A	No active calls
	In a Meeting	N/A	N/A	Off	Free or Tentative	Meeting or Training	No active calls
	Call Forwarding Always	N/A	On	Off	Free or Tentative	N/A	No active calls
	Do Not Disturb	On	Off	Off	Free or Tentative	N/A	No active calls
	Available	Off	Off	Off	Free or Tentative	None	No active calls

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

CALL STATES

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

CALL STATE	DISPLAY NAME	ICON	DESCRIPTION
Ringing In (Local)	Incoming Local		This represents a Click-To-Dial call ringing on your phone.
Ringing In (Remote)	Incoming		The call is coming in and ringing on your phone.
Ringing In (Recalled	Call Recalled		The call was parked or camped and is being recalled because its timer has expired.

CALL STATE	DISPLAY NAME	ICON	DESCRIPTION
Call)			
Ringing Out	Outgoing		The call is outgoing, ringing out. This is equivalent to a phone ringing on the called party's phone.
Active	Active		The call is an active call.
On Hold	Held		The call is on hold.
On Hold (Remote Held)	Remote Held		The call is held by the remote party.
Active (In Conference)	Active		The call is in a conference and active.
Held (In Conference)	Held		The call is in a conference and on hold.

UNIFIED INSTANT MESSAGING AND PRESENCE STATES

IM&P states indicate you or your contacts' availability to communicate using an IM&P client. The possible states are as follows:

IM&P STATE	ICON	DESCRIPTION
Subscribed states		
Available		The contact is online, available on one or more devices, and not busy on any device.
Busy		The contact is online, but currently busy on one or more devices. Do not disturb.
Away		The contact is connected but away from one or more devices and not busy on any device..
Offline		The contact if offline on all devices. If you are offline, you do not receive any presence updates or instant messages. Also, your Instant Message directory; is empty and the presence state of your contacts in other directories is set to "Offline".
Unsubscribed states		
Pending Subscription		You sent a subscription request to the contact, but it has not yet been accepted. Clicking the icon resends the request.
Not subscribed		The contact has an IM&P service but you are not subscribed to monitor their state and the contact is not listed in the *Instant Message* directory. Clicking this icon sends a subscription request to the contact.

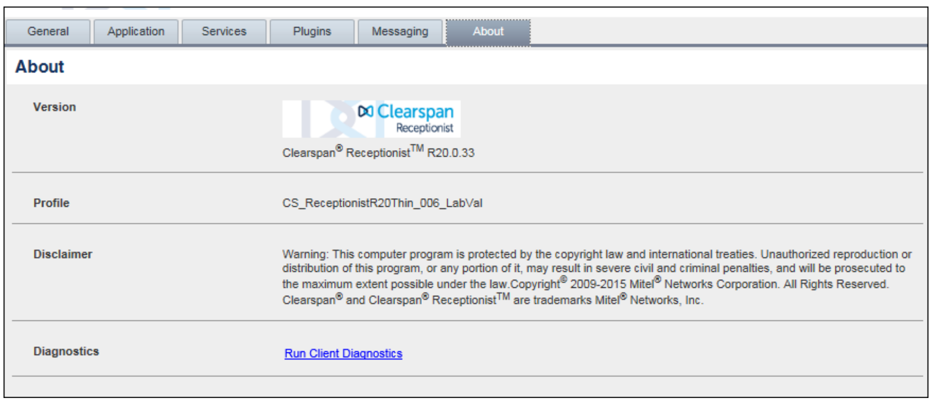
APPENDIX B: DIAGNOSTIC TOOL

The Diagnostic Tool provides client-side performance measurements for the Receptionist client to help troubleshoot client application performance problems. It should only be used when performance problems occur and with the assistance of a support person.

Note: The Diagnostic Tool is available in Release 21.0.12 or later and only if enabled by the service provider.

LAUNCH DIAGNOSTIC TOOL

To start the Diagnostic Tool, go to the *Settings – About* page and click the **Run Client Diagnostics** link.



DIAGNOSTIC TOOL GUI

The Diagnostic Tool runs in a separate browser window. Its user interface consists of six tabs: Session, Long Polling, Calls, Service, Monitoring, and Support. Each tab is described in a separate subsection.

SESSION TAB

The Session tab displays session information stored for the user on Clearspan. It provides information about the logged user, connection, and subscriptions.

- The user information includes your name, user ID, phone number, extension, and the list of services assigned to you.
- The connection information includes the session ID for the current session, the channel ID for the OCI-C channel, and the address of the Xtended Services Platform on which the client is running.
- The subscription table shows all active subscriptions for the logged in user and is updated in real-time.

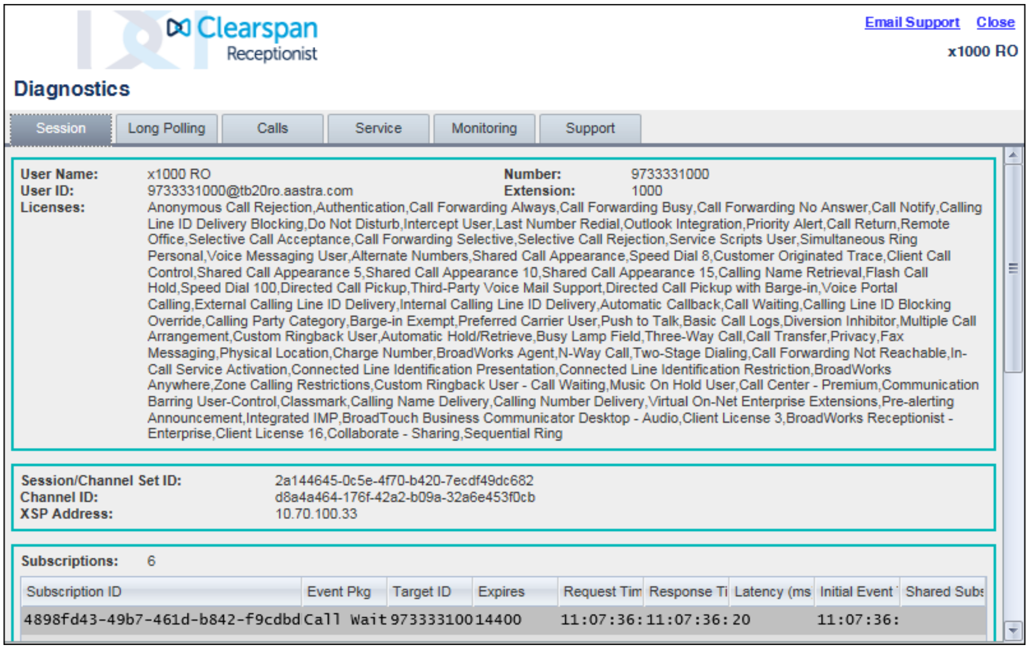


Figure 110 Diagnostic Tool – Session Tab

LONG POLLING TAB

The Long Polling tab shows, in real-time, statistics on long polls performed by the client. The Polls table lists long polls and includes the request timestamp, response timestamp, status, and poll time of each long poll.

By default, the number of long polls retained in the Polls table is 10.

To change the number of displayed long polls, click the drop-down arrow in the *Polls* combo box, and select a new number from the drop-down list.

The *Data* column of the Polls table indicates whether the long poll contains data or not. If the icon in the *Data* column is a green icon, then the corresponding long poll contains data and clicking on the row for the long poll displays detailed data in the Poll Details table at the bottom of the page.

The Poll Details table displays the feature data that is contained in the update, and the event type and event ID that triggered the data update.

To clear the tab and start fresh captures of the long polls, click the **Clear** button.

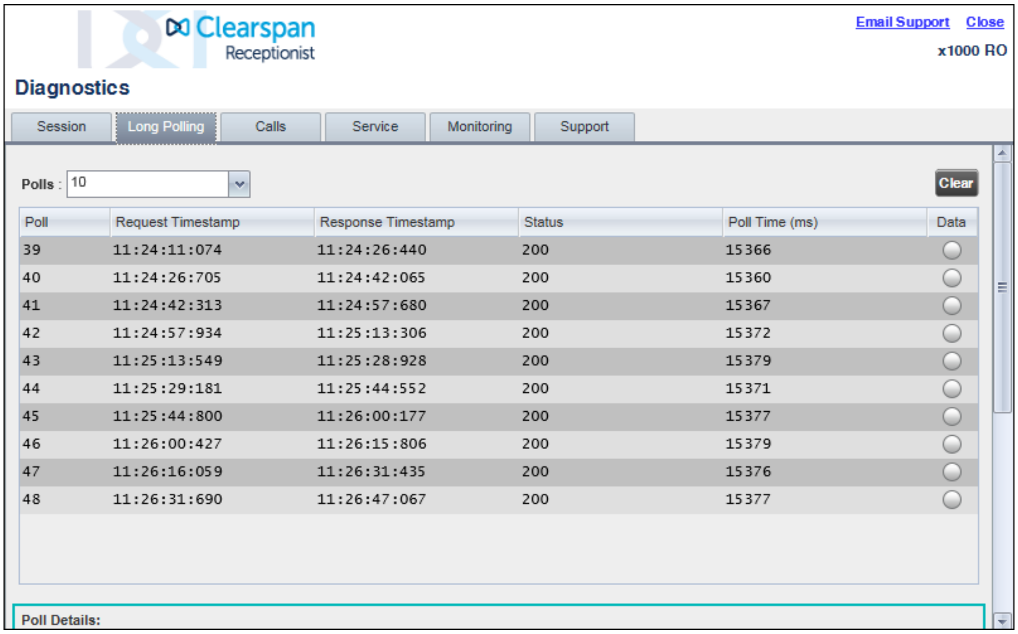


Figure 111 Diagnostic Tool – Long Polling Tab

CALLS TAB

The Calls tab shows call statistics for calls placed through the *Dialer*. For each call, the following information is displayed: the called destination, the call ID of the outbound call, the time the number was dialed, the time the client received the incoming alerting call update, the client answer time (if the call was answered from the client), and the time the client received the outgoing call update.

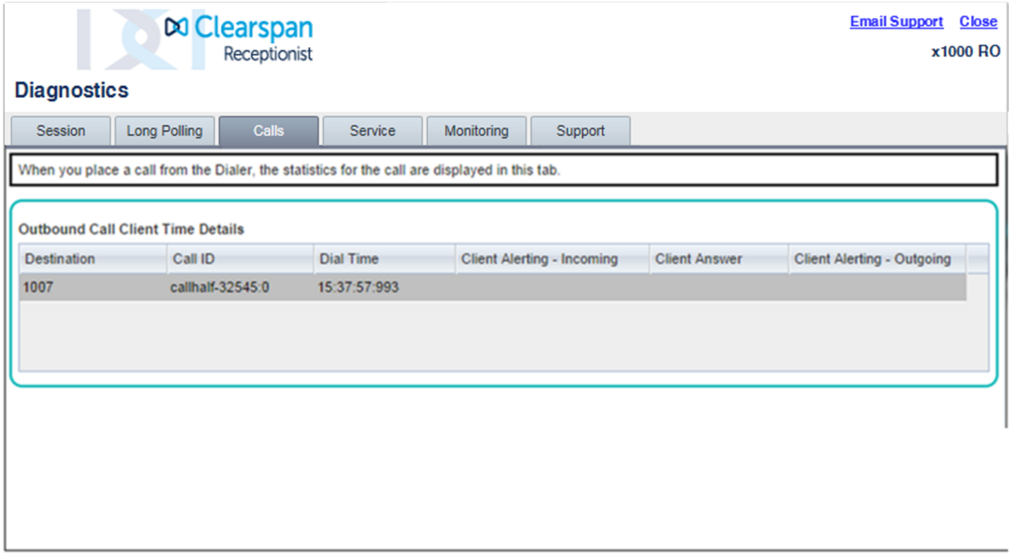


Figure 112 Diagnostic Tool – Calls Tab

SERVICE TAB

The Service tab measures the time for enabling/disabling the Do Not Disturb (DND) service from the client. It is only shown if you have the DND service assigned.

For each service action, the tool displays the command that was invoked (DND On or DND Off), the time the command was invoked from the client, the time the command response was received by the client, and the time difference in milliseconds between the request time and the response time.

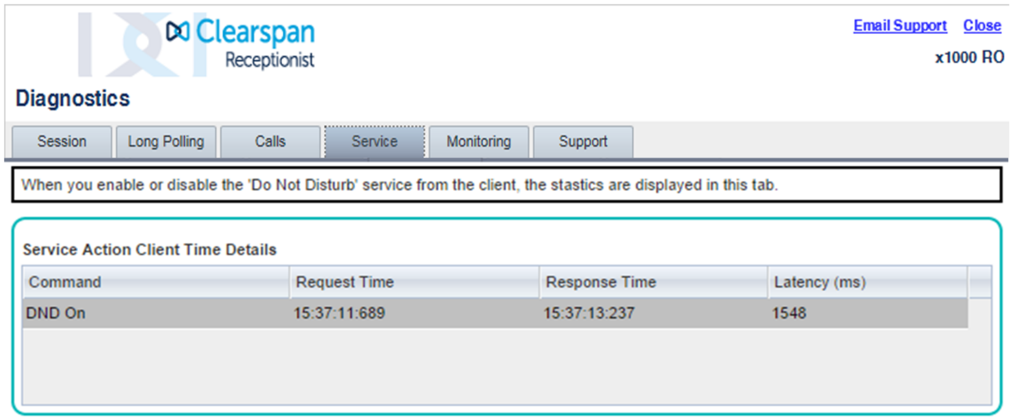


Figure 113 Diagnostic Tool – Service Tab

MONITORING TAB

The Monitoring tab displays statistics on dynamically monitored contacts. The *Target* column displays the user ID of the contacts being monitored.

The Monitoring tab is only available in Receptionist – Enterprise and if dynamic monitoring is enabled.

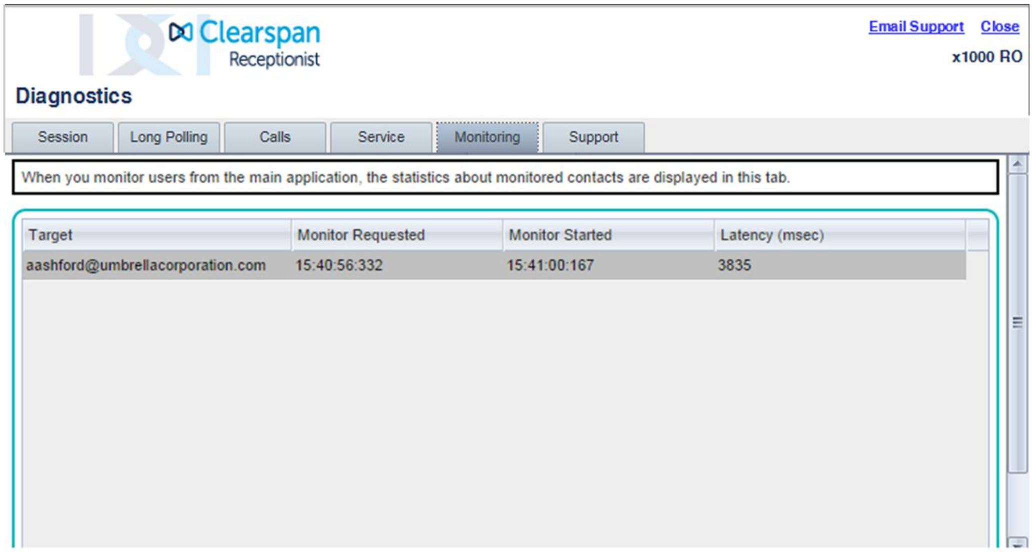


Figure 114 Diagnostic Tool – Monitoring Tab

SUPPORT TAB

The Support tab is a textual representation of all data contained in the other tabs. The text in this tab should be copied and pasted into the body of the e-mail that you send to the technical support of your service provider.

The Email Support link in the upper right-hand corner of the Diagnostic Tool can be used to open the default e-mail client on your machine. If the “To” address is not preconfigured by the service provider, the support person should provide it to you.

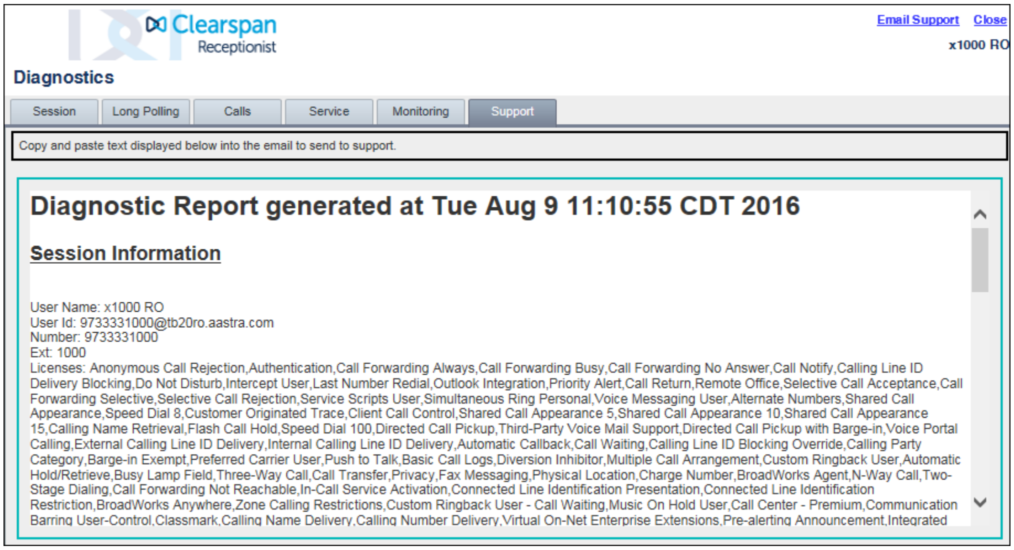


Figure 115 Diagnostic Tool – Support Tab

KNOWN ISSUES

If you are using the Chrome browser to run Receptionist, and you click the Diagnostic Tool Email Support link, an untitled tab may open in the Receptionist window, in addition to the new message window of your default e-mail application.

The issue can occur if the Chrome browser attempts to process the request with a different mail protocol than the one defined on your computer.

APPENDIX C: KEYBOARD SHORTCUTS

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

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

KEY	EQUIVALENT MOUSE ACTION	DESCRIPTION
	click **Hold**.	active call on hold, pressing **SHIFT+2** selects and answers the second active call, and so on.
SHIFT+1..9	Select a held call and click **Retrieve**.	Pressing **SHIFT+1** selects and retrieves the first held call, pressing **SHIFT+2** selects and retrieves the second held call, and so on.
S or s	Click on **Settings** link.	This opens the *Settings* page if main window is in focus.
B or b	Click on **Back to Application** link.	This goes back to the main page from the *Settings* page.
R or r	Click the **Call History** button.	This opens the *Call History* dialog box.
H or h	Click the **Help** link.	This opens this guide in a PDF format.
SHIFT+L or SHIFT+l	Click the **Sign Out** link.	This signs the user out of the application.

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