RECEPTIONIST CONSOLE

USER GUIDE

RELEASE 18.0

COMCAST
BUSINESS

TABLE OF CONTENTS

TABLE OF FIGURES

1 ABOUT THIS GUIDE

This guide provides step-by-step procedures and reference information for Receptionist Console Enterprise, Release 18.0.

1.1 AUDIENCE

This document is intended for end users of Receptionist Console Enterprise.

1.2 HOW THIS GUIDE IS ORGANIZED

In section 2, Receptionist Console Overview gives an overview of Receptionist Console.

The rest of this document provides a detailed description of Receptionist Console functionality.

2 RECEPTIONIST CONSOLE OVERVIEW

Receptionist Console is a carrier class Internet Protocol (IP) Telephony Attendant Console, that extends the functionality of your Business VoiceEdge™ solution. It is used by "front-of-house" Receptionists or telephone attendants, who screen inbound calls for Enterprises. The Receptionist Console realizes the promise of IP Telephony by enhancing business processes and delivering rich services in a user-friendly way.

Receptionist Console delivers the following real benefits to users:

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

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

3 LOGGING IN

3.1 WEB PORTAL LOGIN

1. Login into your Business VoiceEdge portal at https//voiceedge.comcast.com with your username and password.

2. Go to **Download** and click on **Desktop Download**.
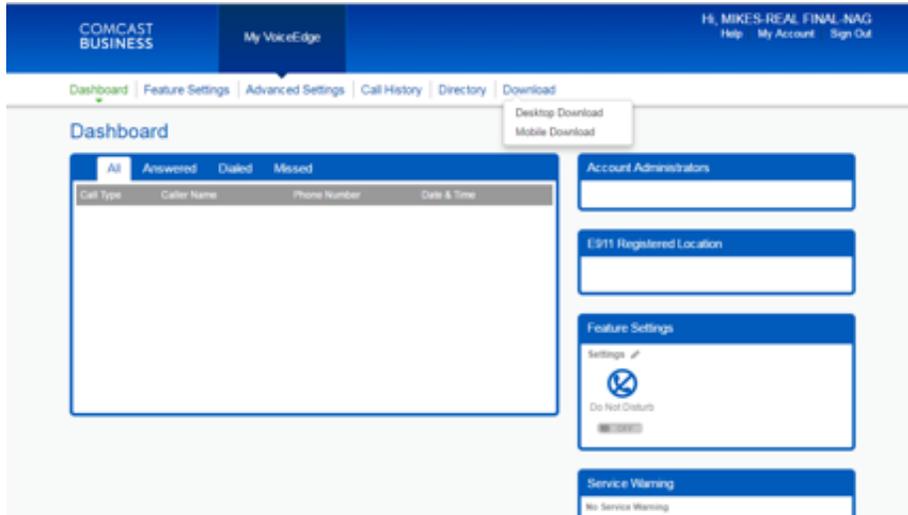
Figure 1 - Web Portal Login

3. Download the Receptionist Client for Windows.
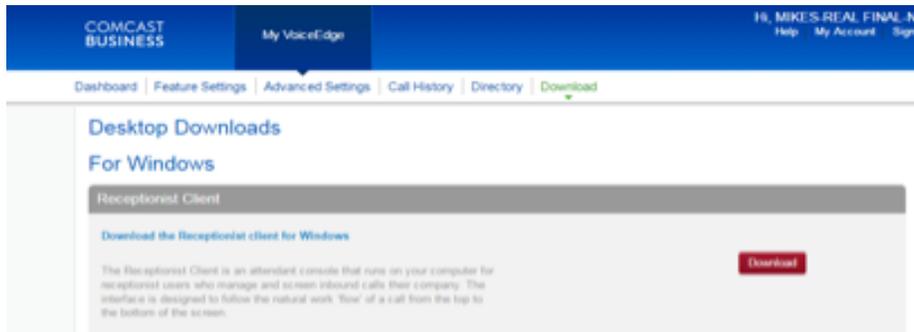
Figure 2 - Web Portal Login - Downloads

4. After clicking **Download**, choose **Open** for the ReceptionistConsole.jnlp file.
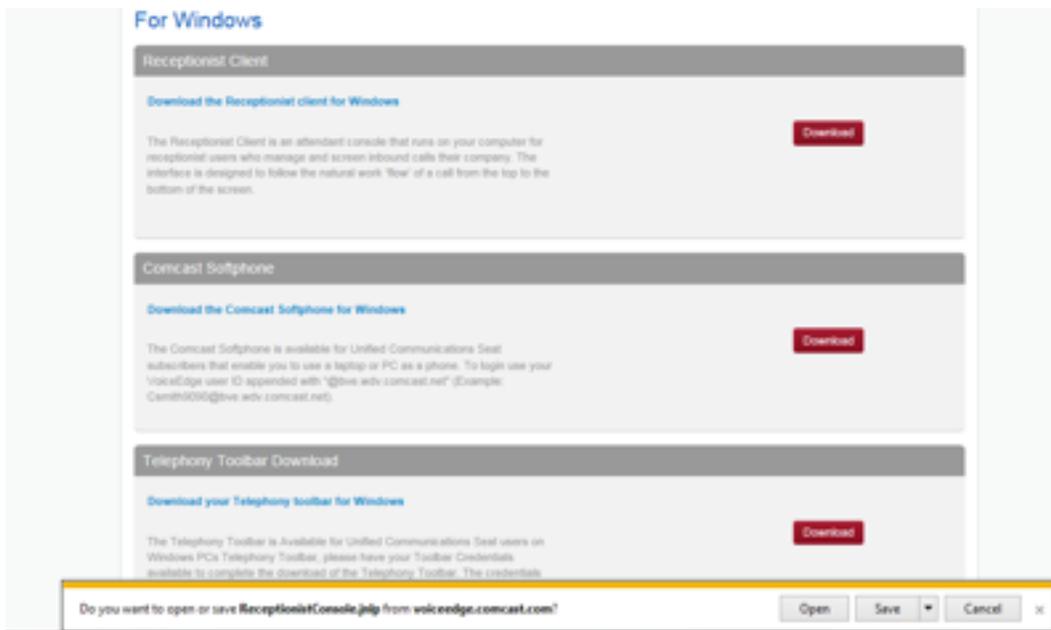
Figure 3 - Web Portal Login - Open

5. The Receptionist Console application will download from respective web server.
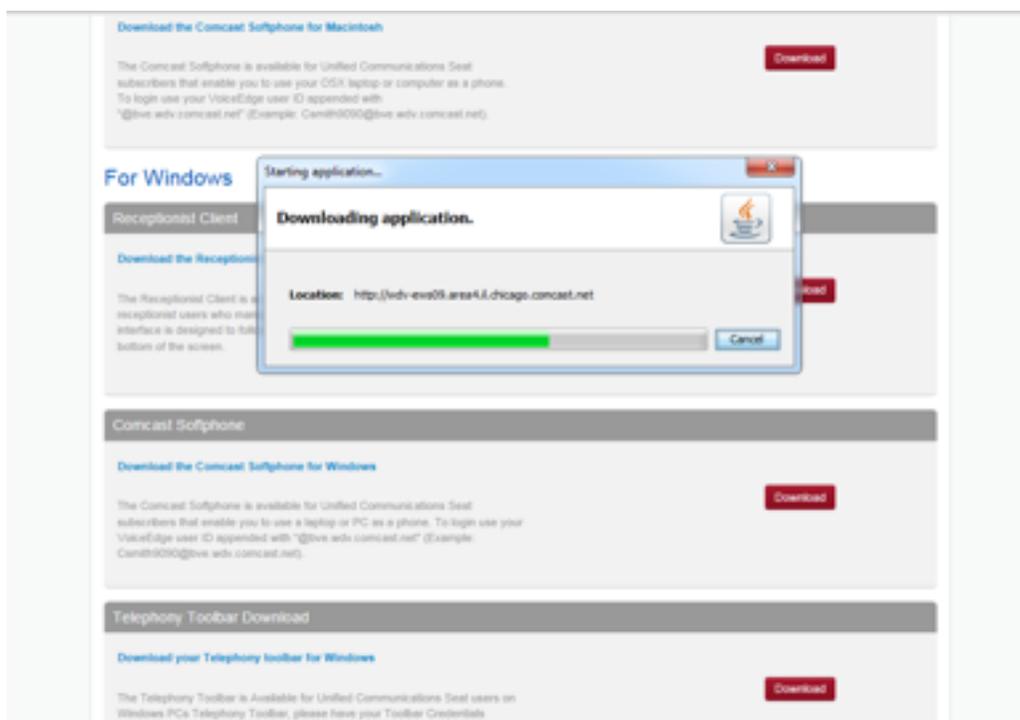
Figure 4 - Web Portal Login - Install

6. When the Java dialogue box appears, click on **Run** to start the application.
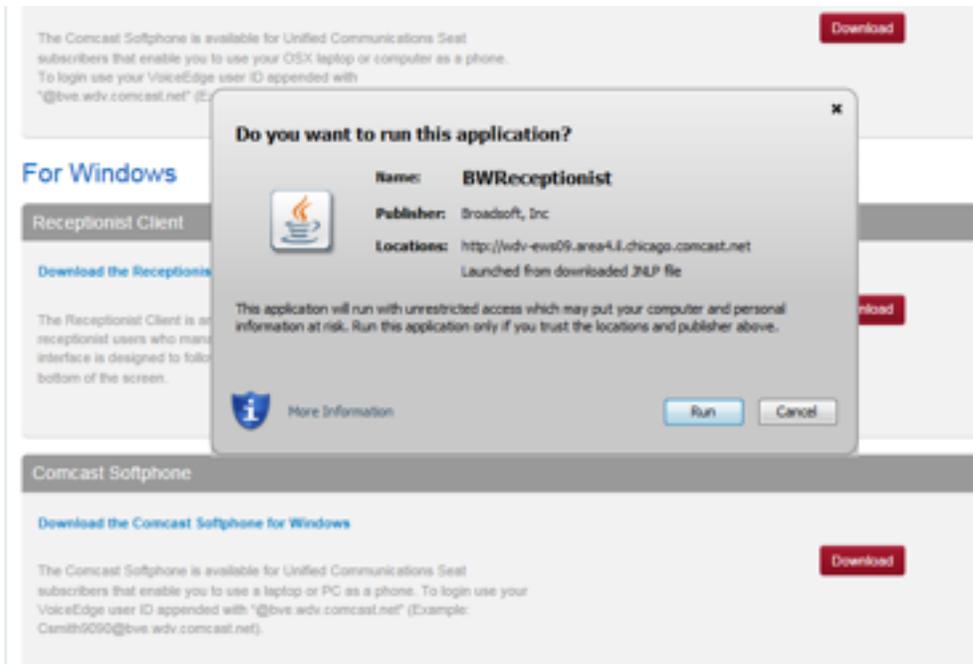
Figure 5 - Web Portal Login - Run

7. The Receptionist Console will launch and an icon will be placed on the desktop.

3.2 DESKTOP LOGIN

The Receptionist Console application will create a desktop shortcut on your first launch, which you can start by double-clicking the shortcut on your desktop or by selecting it from the Start menu.

1.   Click the Receptionist Console shortcut.

2.   Enter your user name and password, which are the same credentials for your Business VoiceEdge Portal.

NOTE: You can also select the Remember Me (or Forget Me) and the Remember my Password options so that your user name and password are remembered on your computer.

3.   Check **Sign me in automatically** to log in automatically when you click the shortcut. You also have to check Remember Me and Remember my Password for automatic sign in to work.

4.   Click **Sign In**.
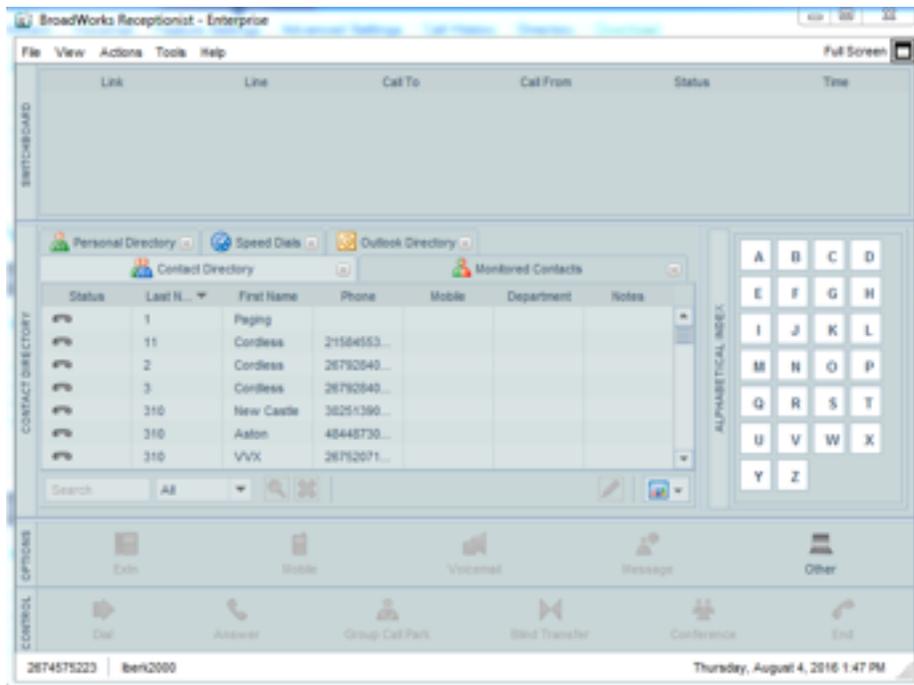
Figure 6 - Receptionist Console

NOTE: If you launch Receptionist Console from a shortcut within five minutes of launching it from the web portal or if you have previously selected Remember Me, Remember my Password, and Sign me in automatically, you are automatically logged in after clicking the shortcut.

4 RECEPTIONIST CONSOLE INTERFACE AND SETUP

This section provides a detailed description of the Receptionist Console interface. The elements that are available only for a specific version of the console are identified as such.

4.1 SWITCHBOARD PANEL

The Switchboard panel is located at the top of the Receptionist work area and shows all the ongoing calls.

Figure 7 - Switchboard Panel

The Switchboard panel has the following components (from left to right):

- The **Link** column lets you select the calls to be linked for a Consulted Transfer and Three-Way Conference. To link calls, click in their Link column cell.

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

- The **Line** column shows the order that phone calls come in, starting from 1.

- The **Call To (Called Party)** column identifies the party being called by you. A name is typically displayed when the called party is in the Contact directory. A number is displayed for calls to persons not in the Contact directory and most external calls.

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

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

Call State	Display Status
Active	Active
Held	On Hold (00:00) (blinks after 45 seconds)
Camp On	Camped (00:00) (blinks after 45 seconds)
Remote Held	Active
Ringing In (Remote)	Incoming
Ringing In (Local)	Incoming
Ringing Out	Outgoing

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

4.2 CONTACT DIRECTORY PANEL

The Contact Directory panel is located as the third panel of the main interface and provides a listing of all contacts available to the operator.
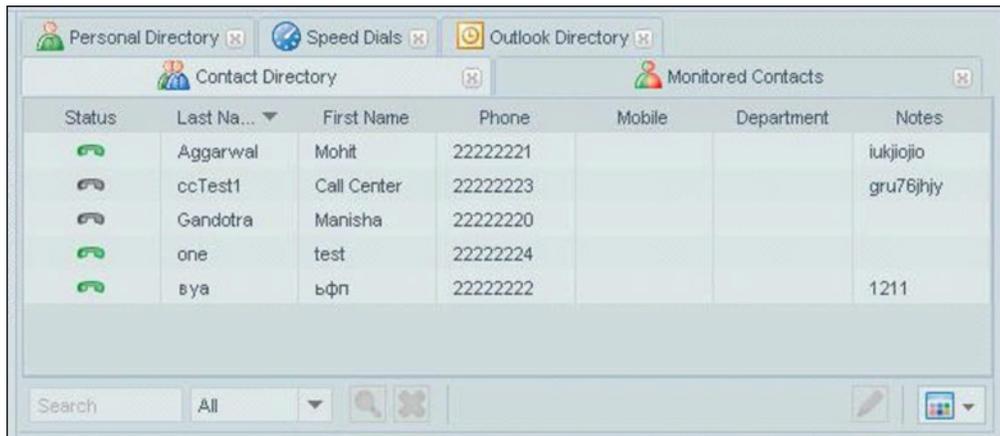
Figure 8 - Contact Directory Panel

4.2.1 Capabilities

You are provided with the following capabilities:

- Contact information
- Convenient access to contact extension numbers and voice mail
- Ability to view contact status
- Ability to search contacts
- Ability to add, delete, and edit speed dial contacts
- Call Management

4.2.2 Directory Management Interface

At the bottom of the Contact Directory panel, there are several dialog boxes and buttons that assist you in managing directories:
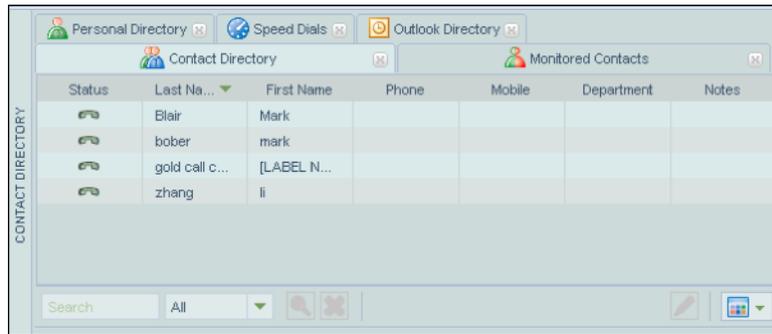
Figure 9 - Contact Directory – Directory Management Interface
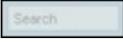
- The **Search** text box [Search] allows you to enter a string you want to use to search for contacts, typically a contact's name or phone number or part thereof. The search returns all contacts containing the string as part of the selected directory field. For example, entering "Ann" and selecting "First Name" from the Search Filter Category returns all contacts with the first name "Ann", but it also returns all contacts with first names such as "Anne", "Marianne", "Marie Ann", "Ann Marie", and so on.

NOTE: The search is NOT case sensitive; searching for "Ann" or "ann" returns the same results.

- The **Search Filter** Category drop-down list [All] allows the operator to choose a directory field for a keyword search. The value selected from this filter drop-down list is the column in which the tool searches for the string entered in the Search text box, as well as the directory.

- The **Search** button [🔍] , when clicked, enacts a keyword search based on the keyword and the Search fields.

- The **Reset** button [✖] , when clicked, displays the full list of contacts, removing the effects of previous searches and filters.

- The **Add** button [➕] allows you to add an entry to the Speed Dials directory. It is only enabled when the Speed Dial directory is selected in the Contact Directory panel.

- The **Delete** button [🗑] lets you remove the entry currently selected in the Contact Directory panel. This button is only enabled for the Speed Dial directory.

For information about managing directories, see **section 7** *Managing Directories.*

4.3 DIRECTORIES

The directory tabs at the top of the Contact Directory panel allow you to choose the directory you want to appear in the panel.
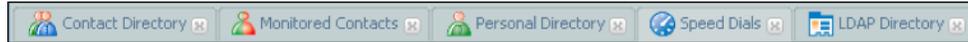
Figure 10 - Directory Heading Tabs

Table 4 lists the directories available for the Receptionist Console.

Directory Name	Contents	Enterprise	Small Business	Office
Comcast Business VoiceEdge Contact Directory	Other subscribers in your Comcast Business VoiceEdge contact directory	✓	✓	✓ Group Only
Comcast Business VoiceEdge Personal Directory	All contacts in your Personal Phone List on the Comcast Business VoiceEdge portal	✓	✓	✓
Speed Dials Directory	All numbers configured for you or by you for your Speed Dial service	✓	✓	✓
Phone Status Monitoring	A list of users, configured through the web portal, whose phone status you are currently monitoring	✓ (Monitoring limited to 200 static and up to 800 dynamic users enterprise-wide)	✓ (Monitoring limited to 30 users company-wide)	✓ (Monitoring limited to eight users group-wide)
LDAP Directory	All users found in the LDAP directory. The directory needs to be configured by your system administrator. Otherwise, it is not visible.	✓		
Custom Contact Directories	Created and customized by the administrator or via the search tool	✓		
Outlook Directory	All your Outlook contacts. The directory needs to be enabled via the Tools – Options tab.	✓		

Table 4 - Receptionist Directories

To show or hide directories tabs in the Contact Directory panel, select **View** and then **Directories** from the menu bar, and then select or deselect directory names.

Changes to the users to monitor lists, Personal Contacts Lists, and Speed Dial lists are made through the web portal and are only visible in the console the next time you sign in.

4.3.1 Contact Status Information

The Call Status icon, available in some directories, in both List and Details view, shows the contact's phone on-hook/off-hook state. The color of the icon is customizable through the Tools – Options – Themes dialog box. The following colors represent the default definitions:

Call Status	Icon	Description
Available		Contact phone is on-hook (available to receive a call).
Busy		Contact phone is off-hook (on a call, busy).
Ringing		Contact phone is ringing (previously this was a blue triangle).
Do Not Disturb		Contact phone has status set to "DND".
Unavailable		Contact phone state is currently unavailable or unknown.
Private		Contact phone state is set to "private".
Call Forwarding Always		Contact has the Call Forwarding Always service turned on. By hovering your mouse over the Call Forwarding Always contact, you can see the number the contact has set the Call Forwarding Always to.

Figure 11 - Call Status Legend

4.3.2 Views

The Receptionist Console has two types of directory views, providing different levels of contact information detail.

- All versions of the console are equipped with the List view of their directories.

List View

The List view lists all the contacts in the selected directory.

Figure 12 - Contact Directory Panel – List View

Additionally, for some directories, such as Contact Directory and Monitored Contacts, the contact's call status is provided.

4.5 OPTIONS PANEL

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

Figure 13 - Options Panel

The Options panel is used to select call managing options and has the following components:

- The **Extn** button allows you to transfer a call or make a call to the selected contact's extension. If this icon is grayed out, the contact does not have an extension number associated with the contact's name in the Contact Directory. Only the group/system administrator can modify this number.

- The **Phone** button allows you to transfer a call or make a call to the selected contact's phone number. It is assigned to the same button as Extn and becomes visible when calling a phone number. Only the group/system administrator can modify this number.

- The **Mobile** button allows you to transfer a call or make a call to the selected contact's mobile phone. If this icon is grayed out, the contact does not have a mobile number associated with the contact's name in the computer database. Only the group/system administrator can modify this number.

- The **Voicemail** button allows you to transfer a call to the selected contact's voice mail.
  If this icon is dull in appearance, the contact does not have voice mail configured. Only the group/system administrator can modify this number.

- The **Other** button, when clicked, displays a dial pad used to enter an ad hoc number.
  It allows you to transfer a call or make a call to another number.

NOTE: The look of the buttons on the Options panel changes as they become available or unavailable. If an option is available in a given context or operation, the corresponding button is active (colorful); otherwise, it is grayed out or invisible.

4.6 CONTROL PANEL

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

Figure 14 - Control Panel

NOTE: The look of the buttons on the Control panel changes as call actions become available or unavailable. Several actions can be assigned to the same button. When an action is active, the button changes to reflect that function. When no action assigned to the button is active, the button is grayed out.

The Control panel is used to execute call actions, and contains the following components, grouped by display button:

- **Dial** button group:
    - The **Dial** button is used to start the dialing process to the number you have selected. You can make a call to a contact when a contact is highlighted and you can make a call to another number when the dial pad has been used. This button is dull in appearance when this action is not an option.
    - The **Send** button is used to send messages. When messaging, the Dial button changes to Send.
- **Answer** button group allows you to perform a variety of functions depending on the context of the active call. The following dynamics change the button based on the call context:
    - The **Answer** button is enabled for incoming calls and allows you to answer a call.
    - The **Hold Conference** button is enabled when the selected call is in a conference and allows you to put the call on hold.
    - The **Unhold Conference** button is enabled when a conference is on hold and allows you to return it to the Active state.
    - The **Hold** button is enabled when a call is active and allows you to put it on hold.
    - The **Unhold** button is enabled when a call is on hold and allows you to unhold it.
- **Transfer** button group allows you to perform a variety of functions depending on the context of the active call. The following dynamics change the button based on the call context:
    - The **Blind Transfer** button is enabled when the selected contact is in the Available call state.
    - The **Voicemail** button is enabled when the contact selected is in the Available call state.
    - The **Consulted** Transfer button is enabled when two call parties are linked on the switchboard.
    - The **Leave Conference** button is enabled when a conference is in an Active state and you want to exit it.
- The **Conference** button group allows you to perform a variety of control functions, depending on the context of the active call. The following dynamics change the button based on the call context:
    - The **Conference** button is enabled when two call parties are linked on the switchboard and allows you to start a conference call.
    - The **End Conference** button is enabled when a conference is active and allows you to end the conference call.
    - The **Call Pick-Up** button is enabled when the contact selected is in a Ringing Call state.
    - The **Call Barge-in** button is enabled when the selected contact is in a Busy Call state and allows you to barge in on the call.
- The **End button** allows you to disconnect the selected call.

*For more information on call management functions, see **section 6** Managing Calls.*

5 MENU BAR

The Menu bar is located at the top of the console's main page. It has the following menu items, described in the following sections: File, View, Actions, Tools, and Help.

5.1 FILE MENU

The **File** menu allows you to sign out or exit the Receptionist Console.
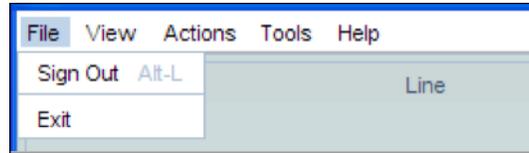
Figure 15 - Receptionist File Menu

The **File** menu items are as follows:

- **Sign Out** signs you out of the console and displays the Login menu so that you can login again (possibly as a different user).
- **Exit** signs you out and exits Receptionist.

5.2 VIEW MENU

The **View** menu allows you to select which information you want to be visible in the Receptionist Console.
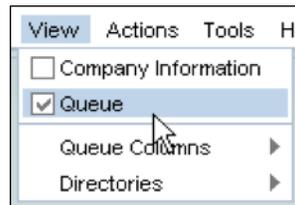
Figure 16 - Receptionist Console View

The **View** menu items are as follows:

- The **Directories** item allows you to select which directories you want to be visible in Receptionist. The selected directories are displayed as tabs at the top of the Contact Directory panel.

NOTE: Directories listed on this menu depend on your version of Receptionist Console and your setup.

5.3 ACTIONS MENU

The Actions menu lists all the phone management actions of the console. Only actions applicable at any given moment are active. All other menu items are grayed out.
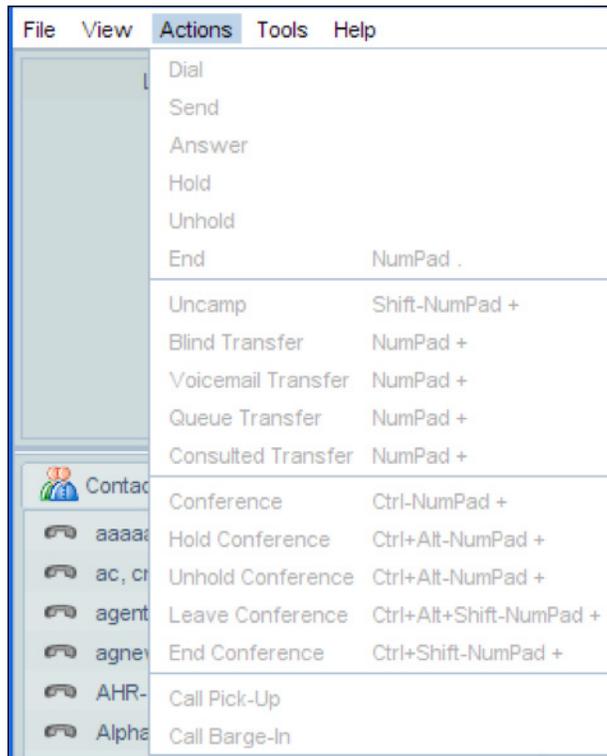
Figure 17 - Receptionist Console Actions Menu

The use of actions is explained in context in the appropriate subsections in section 6 Managing Calls.

5.4 TOOLS MENU

The Tools menu contains various tools that help you set up and manage the console.
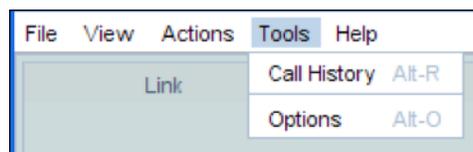
Figure 18 - Receptionist Console Tools Menu

The tools are Call History and Options. They are described in the following sections.

5.4.1 Tools – Call History

The Call History dialog box is used to view and delete the user's call logs. The dialog box can be displayed from the Menu bar by selecting Tools – Call History.
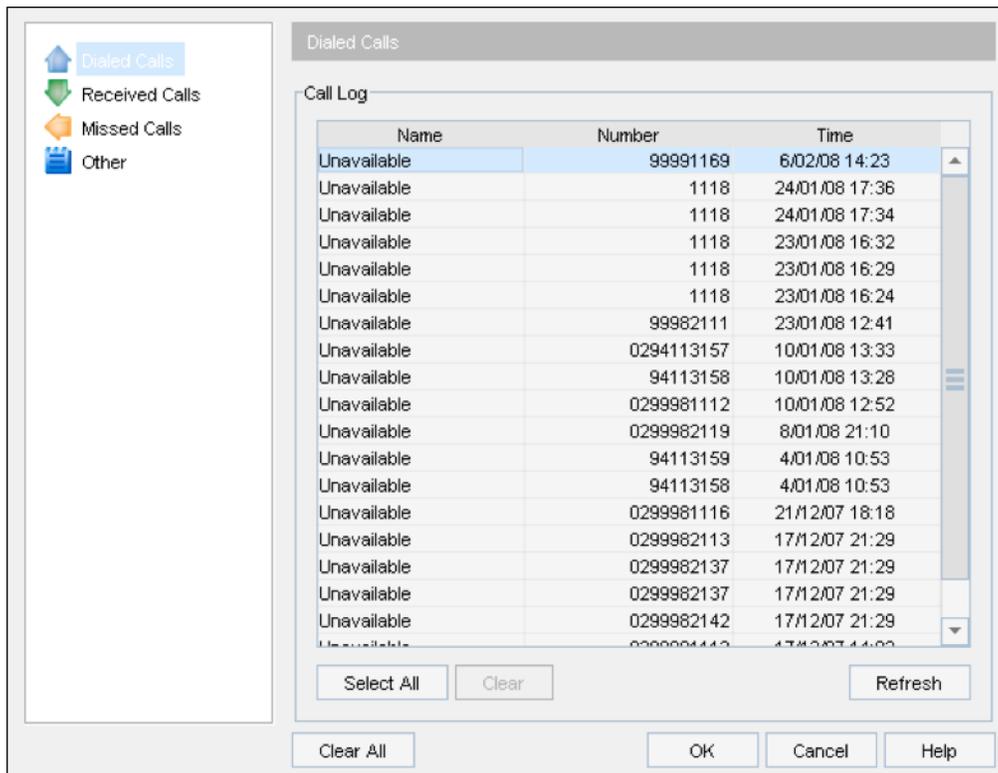
Figure 19 - Tools – Call History

The following sections describe all the tabs, with those available only in some versions of the Receptionist Console clearly identified.

Dialed Calls Tab

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

Figure 20 - Call History – Dialed Options

The records contain the following information:

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

Received Calls Tab

To see received calls, click the Received Calls tab.

Figure 21 - Call History – Received Calls

The records contain the following information:

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

Missed Calls Tab

To see missed calls, click the Missed Calls tab in the Calls History dialog box.
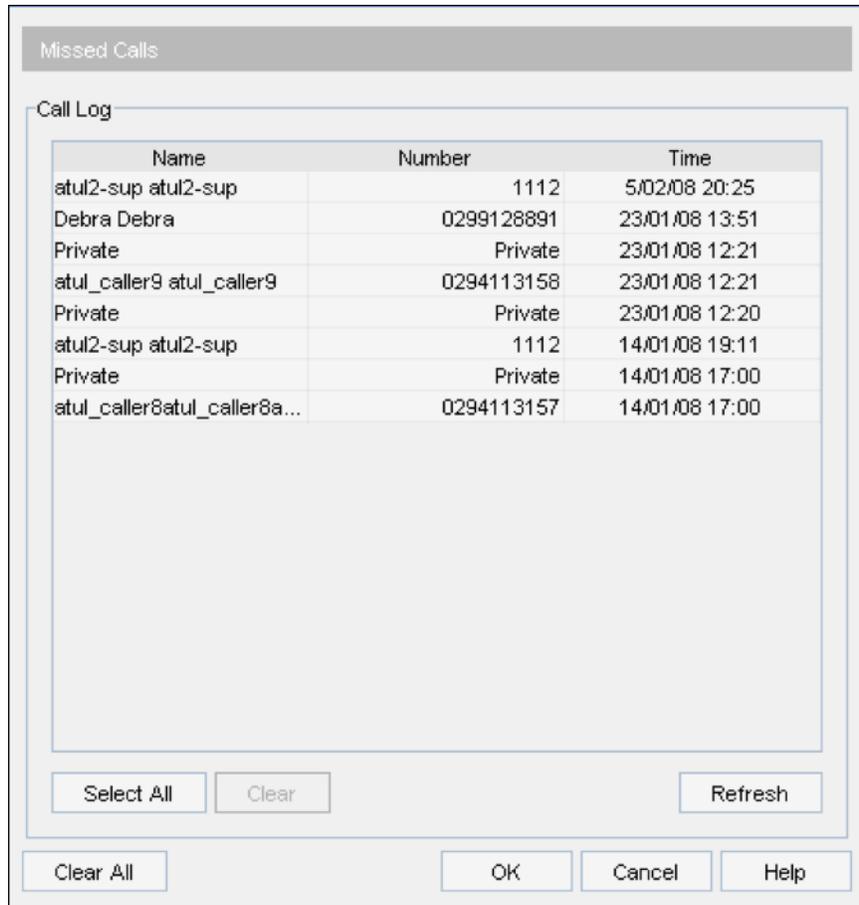
Figure 22 - Call History – Missed Calls

The records contain the following information:

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

Delete Call History Logs

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

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

Figure 23 - Select All Button

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

Figure 24 - Clear All Button

2. A warning message asks for your confirmation. Select **Yes**.
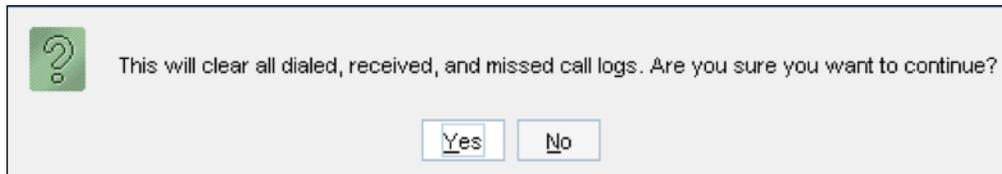
Figure 25 - Call History Confirmation Message

The entries are now cleared.

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

5.4.2 Tools – Options

The Tools dialog box is used to configure user/service provider settings and preferences. The dialog box can be displayed from the Menu bar by selecting Tools and then Options. It is available on both the login and main interface pages.
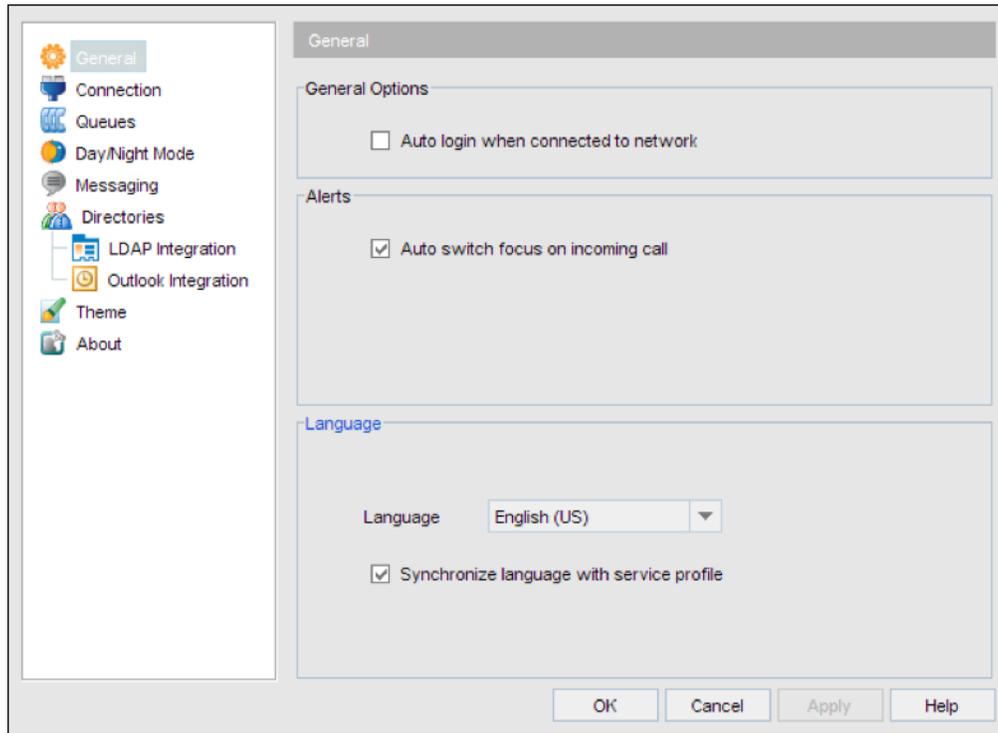
Figure 26 - Tools – Options

The dialog box in Figure 26 displays all Receptionist Console options. The following sections describe all the options, with options available only to some versions of the Receptionist clearly identified.

General Tab

The General tab contains miscellaneous features that improve the usability of the Receptionist Console.
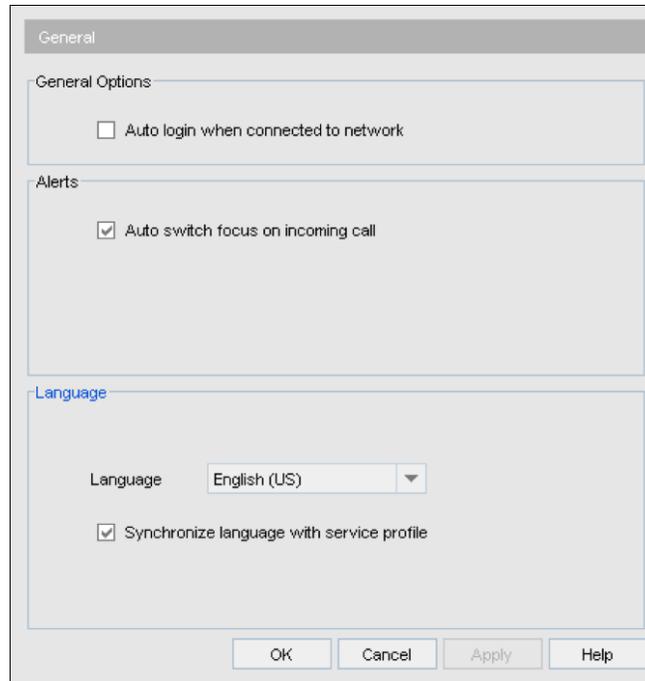
Figure 27 - Options – General

The General Options are as follows:

- Auto login when connected to network enables Receptionist to automatically try to re- connect and log in to the server after you lose your network connection.

The Alerts are as follows:

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

The Language options are as follows:

- The Language drop-down list allows the option of changing the language from the default English (U.S.). The language options are:
  - English (U.S.)
  - French (France)
  - German (Germany)
  - Italian (Italy)
  - Spanish (Spain)
  - Spanish (CALA), for Central and Latin America
  - Simplified Chinese (PRC), for People's Republic of China
  - Any custom language the administrator has specified

Selecting the desired language, click OK and restart the console for the changes to take place.

- Synchronize language with service profile, when checked, enables Receptionist Console to automatically match the application language to the language set within the Business VoiceEdge Portal account settings after signing in.

NOTE: If no profile match is found, the language remains set to the current language

Directories Tab

Click on the Directories tab to configure which directory is visible on startup of Receptionist.
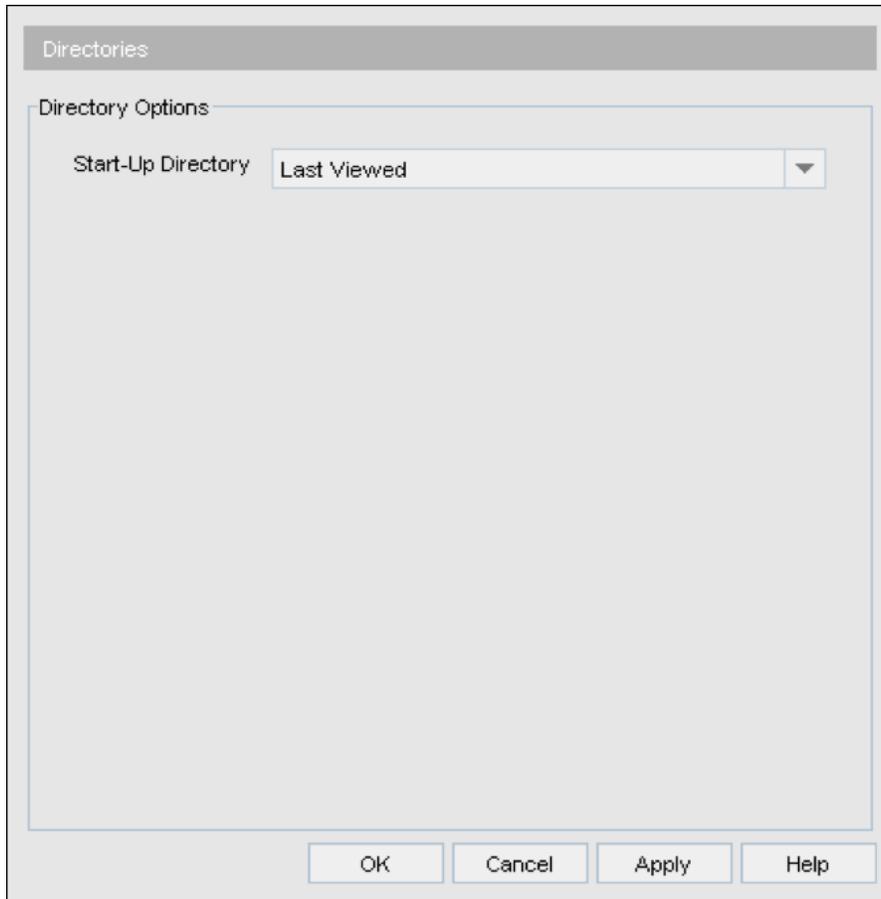
Figure 28 - Options – Directories

The Directory Options allows you to select the directory you want to appear in the Contact Directory panel at startup.

Click on the Start-Up Directory drop-down list to select the "Last viewed" directory or any other directory available to you.

5.5 HELP MENU

The Help menu contains the following items:

- User Guide – A link to a PDF version of this guide.
- About Receptionist IHS – The same information as the Tools – Options About tab.
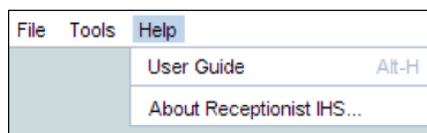
Figure 29 - Receptionist – Help Menu

6 MANAGING CALLS

You manage calls using a combination of the panels in a top to bottom workflow style. You should be able to distribute calls typically using this workflow for most of the activities in the following subsections.

The following subsections describe the call management functions available in the console. Functions available only in certain versions of Receptionist Console are identified as such.

6.1 DIALING

Dialing allows you to make calls to contacts in a variety of ways.

6.1.1 Dial Contact

To make a call to a contact:

1. Find and select the contact you want to call by searching the Contact Directory or any other directory where the contact may be listed.

Figure 30 - Contact Directory Panel

2. In the Options panel, select the option you want to use for this contact. Possible options include the extension, mobile, or voice mail. In most cases, an option (usually the contact's extension) is selected by default. To change the selected option, simply click another option once. Unavailable options are dull in appearance.
3. In the Control panel, click Dial. Alternatively, click Actions on the Menu bar, and select Dial from the drop-down list.

Figure 31 - Dial Button

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

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

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

6.1.2 Dial Ad Hoc Number

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

1.   In the Options panel, click **Other**. The dial pad appears

Figure 32 - Other Button

2.   Enter the number you want to call either by typing the number on the keyboard or by selecting each number in turn from the dial pad using your mouse.
3.   Click the **Dial** button on the Control panel. Alternatively, click **Actions** on the Menu bar, and select **Dial** from the drop-down list.

Figure 33 - Dial Button

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

6.1.3 Dial from Call History

You can initiate a call from Call History, by clicking a phone number in one of the call logs. To dial from Call History:

1. From the Menu bar, select **Tools** and then **Call History**.
2. Select the Call History page you want (Dialed Calls, Received Calls, or Missed Calls).

When you move the cursor over a telephone number in a call list, the number becomes underlined to indicate that it is a hyperlink that can be clicked.
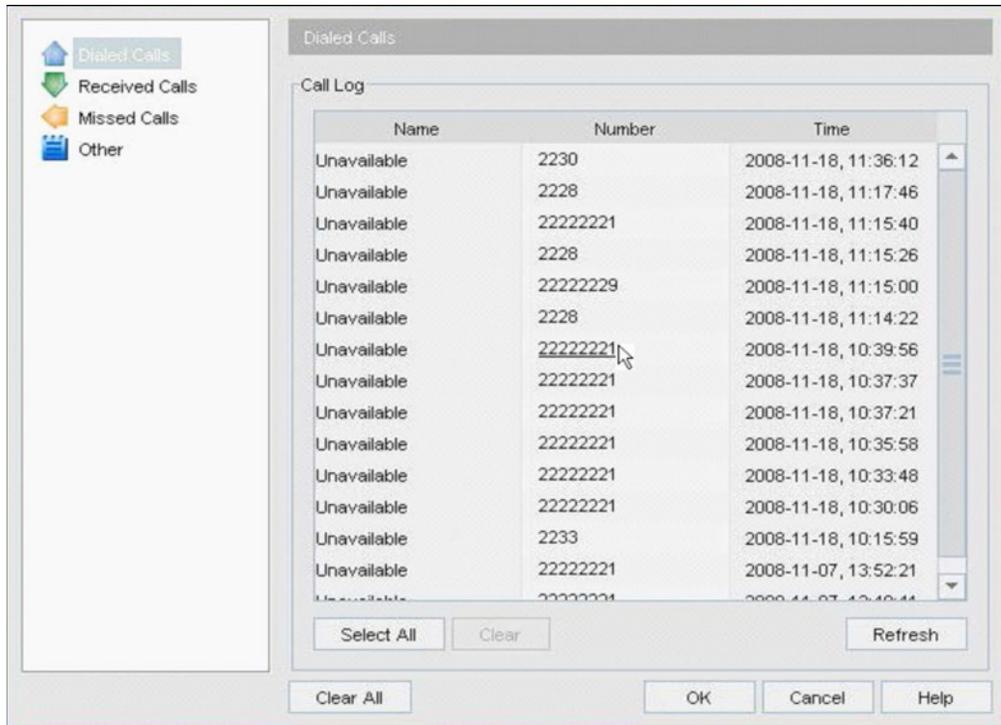
Figure 34 - Dialing From Call History

3. Click the phone number you want to call.

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

Figure 35 - Switchboard Panel – Dialed Call

6.2 ANSWER CALL

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

To answer a call:

1. Select the call you want to answer from the Switchboard panel.

Figure 36 - Switchboard Panel – Incoming Call

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

Figure 37 - Answer Button

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

6.3 PUT CALL ON HOLD

You put call on hold using the Hold button. The call must be already in progress.

6.3.1 Hold Call

To place a call on hold:

1. Select the call you want to put on hold from the Switchboard panel.

Figure 38 - Switchboard Panel – Active Call

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

Figure 39 - Hold Button

The call status changes to "On Hold".

6.3.2 Unhold Call

To take a call off hold:

1. Select the call you want to take off hold from the Switchboard panel.

Link	Line	Call To	Extn	Call From	Status	Time
	1	Mary Sh...	1021		On Hold (00:20)	00:19

Figure 40 - Switchboard Panel – Held Call

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

Figure 41 - Unhold Button

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

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

6.4 END CALL

To end a call:

1. Select the call you want to end from the Switchboard panel.

Link	Line	Call To	Extn	Call From	Status	Time
	1	Mary Sh...	1021		Active	00:19

Figure 42 - Switchboard Panel – Active Call

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

Figure 43 - End Button

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

NOTE: When you end an incoming call before the call has been answered, the caller continues to hear the ringing tone until the caller hangs up.

6.5 TRANSFERRING CALLS

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

6.5.1 Blind/Cold Transfer Call

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

To conduct a blind transfer using drag and drop:

1. Click the call you want to transfer from the Switchboard panel with your left mouse button. Your cursor changes to a handgrip to indicate the call is moveable.

Figure 44 - Hand Grip Cursor

2. To scroll up or down a list, move the cursor over the corresponding corner of the contact directory. To cancel the move at any time, press **Esc**.
3. Drag the call to the target contact in your Contact Directory or Customized Directory, and let go of the left mouse button. The call is now transferred. If the target contact is busy, the call is camped.

To conduct a blind transfer:

1. Select the call you want to transfer from the Switchboard panel.
2. Select the option to which you want to blind transfer the call. This number may be the option for a contact from the Contact Directory, a speed dial, or another number of your choice entered using the Other dial pad.
3. Click **Blind Transfer** highlighted on the Control panel. If the Blind Transfer button is not highlighted, click **Actions** on the Menu bar, and then select Blind Transfer.

Figure 45 - Blind Transfer Button

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

6.5.2 Conduct Supervised Transfer

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

1. Make sure that the first call is answered and active.
2. Dial the number you want to transfer the call over to.
3. Click the **Consulted Transfer** button on the Control panel to conduct the transfer. If the Consulted Transfer button is not highlighted, click **Actions** on the Menu bar, and then select **Consulted Transfer**.

Figure 46 - Consulted Transfer Button

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

6.5.3 Conduct Warm/Consulted Transfer

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

To conduct a warm transfer:

1. Dial the contact you want to transfer the call to.
2. When the call is connected, consult with the called contact.
3. Link the two calls to be connected together by clicking in the Link column on the Switchboard panel. You must do this for both calls, thereby identifying the calls to link.

Figure 47 - Switchboard Panel – Linked Calls

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

Figure 48 - Consulted Transfer Button

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

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

6.5.4 Transfer to Voice Mail

To transfer a call to voice mail:

1. Select the call you want to transfer from the Switchboard panel.

Figure 49 - Switchboard Panel

2. From the Contact Directory, select the name of the contact with voice mail where you want to transfer the call. Select yourself if you want to transfer the call to your voice mail.

NOTE: This option is only available if the contact to whose voice mail you would like to transfer the call has the Voice Messaging service assigned and enabled. Otherwise, the Voicemail option is grayed out.

3. On the Options panel, click **Voicemail**.
4. Transfer the call to the contact's voice mail by clicking Voicemail Transfer on the Control panel. Alternatively, click **Actions** on the Menu bar, and select Voicemail Transfer from the drop-down list.

Figure 50 - Voice Mail Button

6.6 CONDUCT DIRECTED CALL PICKUP

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

To conduct a Directed Call Pickup:

1. Select a contact who you want to pick up the call for. The contact's status must be "Ringing".
2. Click **Call Pick-Up** highlighted on the Control panel. Alternatively, click **Actions** on the Menu bar, and select Call Pick-Up from the drop-down list.

Figure 51 - Call Pick-Up Button

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

6.7 BARGE-IN ON A CALL

Call Barge-in allows you to barge in on a contact's call. This is useful when you want to enter an already established call between two other people. This functionality is only available if you have been assigned this service by your group/system administrator. Depending on your setup, you can barge in on contacts in your group or enterprise.

To conduct a call barge-in:

1. Select a contact who you want to pick up the call for. The contact's status must be "Ringing".
2. Click **Call Pick-Up** highlighted on the Control panel. Alternatively, click **Actions** on the Menu bar, and select Call Pick-Up from the drop-down list.
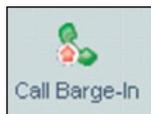
Figure 52 - Call Barge-in Button

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

You enter an ongoing call, thereby establishing a Three-Way Conference.

6.8 MANAGING CONFERENCE CALLS

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

Figure 53 - Conference Button

6.8.1 Start Conference Call

To start a conference:

1. Select the calls. Choose both parties with whom you want to conduct a conference from the Switchboard panel.
2. Link the two calls by clicking on both their "LINK" entries. One chain link should appear in each respective entry.

Figure 54 - Switchboard Panel – Linked Calls

3. On the Control panel, click **Conference**. Alternatively, click **Actions** on the Menu bar, and select **Conference** from the drop-down list.

Figure 55 - Conference Button

Both calls become Active.

6.8.2 Hold Conference Call

To hold an active conference, click **Hold Conference** on the Control panel. Alternatively, click **Actions** on the Menu bar, and select **Hold Conference** from the drop- down list.

Figure 56 - Hold Conference Button

Figure 57 - Held Conference Switchboard Panel

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

Figure 58 - Switchboard Panel – Active Conference

6.8.3 Unhold Conference Call

To reactivate a held conference:

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

Figure 59 - Unhold Conference Button

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

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

Figure 60 - Switchboard Panel – Active Conference

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

6.8.4 Leave Conference Call

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

Figure 61 - Leave Conference button

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

6.8.5 End Conference Call

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

Figure 62 - End Conference Button

The calls are removed from the Switchboard panel and terminated.

7 MANAGING DIRECTORIES

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

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

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

7.1 VIEW DIRECTORY

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

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

7.2 HIDE DIRECTORY

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

From the Directories drop-down list, uncheck the directory you want invisible. Alternatively, click the **x** on the Directory tab.

7.3 SELECT DIRECTORY

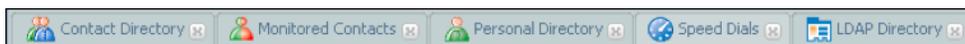Use the Contact Directory tab list to select the directory displayed in the Contact Directory panel.

Figure 63 - Directory Heading Tabs

7.4 SEARCH DIRECTORY

You can search a directory using the search feature located at the bottom left of the Contact Directory panel.
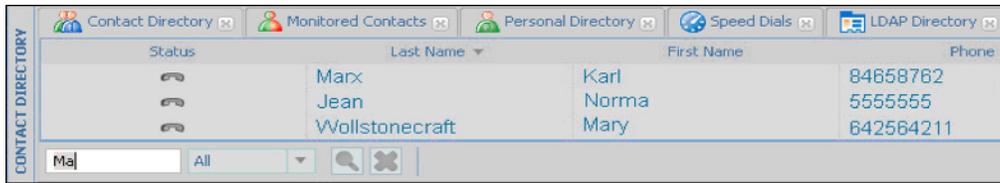

Figure 64 - Search Directory

To search a directory:

1. Click the target directory tab at the top of the Contact Directory panel.
2. Enter a keyword (or part of a keyword) in the Search text box at the bottom left of the Contact Directory panel.

NOTE: The keyword search is NOT case sensitive; the search for "Ann" or "ann" returns the same results.

3. Select a category (directory field) from the Search Filter Category drop-down list. The available categories depend on the directory you are searching. The default value is "All".
4. Click **Search**.

The results of the search appear in the Contact Directory panel.

Depending on your setup, the Receptionist Console returns either all the contacts (in the Contact Directory), which contain the entered keyword as any part of the selected filter (directory columns) or all the contacts that start with the entered keyword.

- In the first case (Contains), entering "Ann" and selecting "First Name" from the Keyword Search Filter drop-down list returns all contacts with the first name "Ann", but it also returns all contacts with first names such as "Anne", "Marianne", "Marie Ann", "Ann Marie", and so on.
- In the second case (Starts With), entering "Ann" and selecting "First Name" returns all contact with the first names such as "Ann", Anne", and Ann Marie", but not "Marianne" or "Mary Ann".

5. To return to the full directory, click Reset.

NOTE: You can narrow down your search, applying another search to the results of a previous search.

The results of the search appear in the Contact Directory panel and the definition of this search is appended to the name of the directory on the selected directory tab.

7.5 MANAGE SPEED DIAL ENTRIES

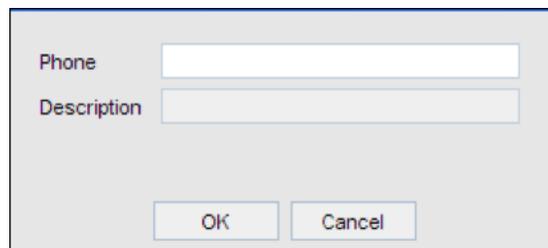There are two types of speed dial entries: Speed Dial 8 and Speed Dial 100.

- **Speed Dial 8.** With Speed Dial 8, Receptionist provides eight predefined empty slots, numbered 2 through 9. Speed Dial 8 entries cannot be added or deleted; they can only be edited. You can assign dialing information to a Speed Dial 8 entry, and change or delete dialing information by editing the corresponding slot.
- **Speed Dial 100.** With Speed Dial 100, you can add up to 100 entries. You can also modify or delete existing Speed Dial 100 entries.

7.5.1 Edit Speed Dial 8 Entry

You can assign, modify, or remove dialing information from a Speed Dial 8 entry using the Edit ![edit icon] button, located at the bottom right-hand corner of the Contact Directory panel.

Assign Dialing Information to Speed Dial 8 Slot

1. In the Speed Dials directory, select an empty Speed Dial 8 slot.
2. Click **Edit**.

Figure 65 - Assign Dialing Information to Speed Dial 8 Slot

3. In the dialog box that appears, enter the phone number and description.
4. To save the entry, click **OK**. Click **Cancel** to exit without saving your changes.

Modify or Delete Assigned Speed Dial 8 Entry

1. In the Speed Dials directory, select an assigned Speed Dial 8 slot.
2. Click **Edit**.

Receptionist opens a dialog box in which you can edit the information.
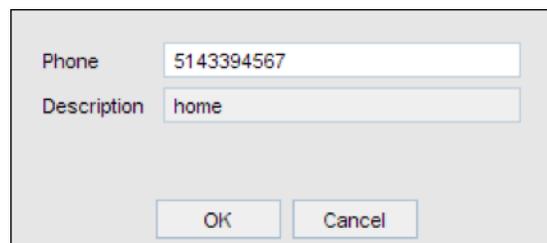
Figure 66 - Speed Dial 8 Entry

3. Modify or delete information as desired. Note, however, that you cannot delete the phone number and leave the description. If you try to do that, an error message appears.
4. To save the entry, click **OK**. Click **Cancel** to exit without saving your changes.

7.5.2 Add Speed Dial 100 Entry

You add a Speed Dial 100 entry using the Add button ⊞ located at the bottom right-hand corner of the Contact Directory panel.
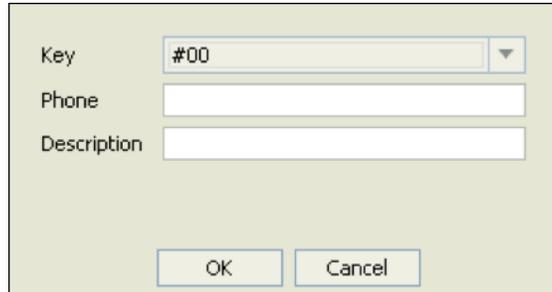
1. Select the Speed Dials Directory tab.
2. Click **Add**.

Receptionist Console opens a window in which you enter the information.

Figure 67 - Add Speed Dial Dialog Box

3. Select a key value from the drop-down list. The key value determines what numbers you have to press on your phone to dial this Speed Dial entry.
4. Enter the phone and description.
5. To save the new entry, click **OK**. Click **Cancel** to exit without creating the new entry.

7.5.3 Edit Speed Dial 100 Entry

You can edit an existing Speed Dial 100 entry using the Edit button ✎ located at the bottom right-hand corner of the Contact Directory panel.

1. Select the Speed Dials Directory tab.
2. Click the desired Speed Dial 100 entry.
3. Click **Edit**.

Receptionist Console opens a dialog box in which you can modify the information.
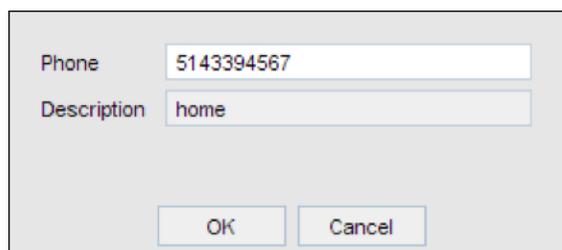
Figure 68 - Edit Speed Dial Dialog Box

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

7.5.4 Delete Speed Dial 100 Entry

You can delete an existing Speed Dial 100 entry using the Delete button 🗑 located at the bottom right-hand corner of the Contact Directory panel.

1. Select the Speed Dials Directory tab.
2. Click the desired Speed Dial 100 entry.
3. Click **Delete**.
4. Click **Yes** to confirm your action.
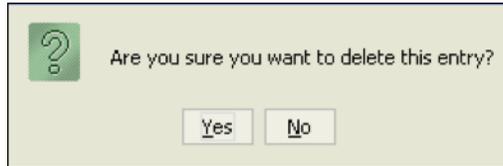
Figure 69 - Confirmation Dialog Box

8 GLOSSARY

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

9 KEYBOARD SHORTCUTS

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

9.1 GENERAL CONTROL KEYS

Key Strokes	Equivalent Mouse Action	Function
ESCAPE	Click OK/CANCEL/EXIT.	Exits from the active window.

9.2 MENU BAR CONTROL KEYS

Key Strokes	Equivalent Mouse Action	Function
Alt + O	Click Tools and then Options.	Displays Options dialog box.
Alt + R	Click Tools and then Call History.	Displays Call History dialog box.
Alt + H	Click Help and then User Guide.	Opens BroadWorks Receptionist User Guide.
Alt + L	Click File and then Logout.	Logs out current user from Receptionist and returns to login screen.

9.3 SWITCHBOARD CONTROL KEYS

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

9.4 CONTACT DIRECTORY CONTROL KEYS

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

9.5 OPTION CONTROL KEYS

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

9.6 CONTROL KEYS

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