

## First Step

First of all, configure a speed dial on your cell phone/landline for this number **xxx-xxx-xxxx** (Apptix Anywhere number).

## During the Day

Please follow these instructions when you are in the office:

- ▶ Dial the speed dial key (which you configured for the xxx-xxx-xxxx number) from your cell phone and at the voice prompt, please press “\*13” to deactivate the incoming calls to your cell phone.
- ▶ Take calls as you would normally take the calls. Transfer and conference end users normally.

Please follow these instructions when you are out of the office (Lunch break/on Field)

- ▶ Dial the speed dial key (which you configured for the xxx-xxx-xxxx number) from your cell phone and at the voice prompt, please press “\*12” to activate the incoming calls to your cell phone. If you have installed the latest Apptix toolbar, then you can activate and deactivate this functionality directly from the toolbar.
- ▶ Take the incoming calls on your cell phone (from your personal desk number)
- ▶ To transfer a call to internal employee who is in office, press pound key “#” twice. This will put the call on hold on the caller’s end and will provide you a dial tone to dial a new destination number. Once you entered the destination number (extension of your internal employee), hang the call on your end and the call will be automatically transferred to the internal employee’s desk number. If you want to talk to the destination internal employee before transferring, stay on call. Once the internal employee answers the call, convey the message and then hang up. If the internal employee doesn’t intend to take the call from that particular caller, please press pound “#” key twice and it will reconnect you to the original caller.
- ▶ I will explain this with a scenario:
  - Matt is about to leave for a meeting in Buffalo, NY. So he dials from his cell phone (610-XXX-XXXX) a speed dial key (2) which is configured to dial xxx-xxx-xxxx). At the voice prompt he dials “\*12” to activate the Apptix anywhere functionality.
  - Caller A (215-780-XXXX) dials Matt’s desk number which is ext 219
  - Matt answers the call on his cell phone (610-XXX-XXXX)
  - Matt finds out that the caller wants to talk to Paul Bush

- Matt dials “#” key twice from his cell phone. This gives Matt a dial tone and the Caller A hears hold music
- Matt dials Paul’s extension (292) and then simply hangs up. The call is transferred to Paul’s extension. If Paul doesn’t answer the call, it goes to Paul’s desk voicemail.
- Matt can also wait till Paul answers the call. Once Paul is made aware of call details, Matt will hang up by pressing the “End” button on his cell phone and the call will be active on Paul’s phone.
- If Paul in this case says that he doesn’t want to take the call from Caller A, Paul will hang up on the call and Matt will press pound key “#” twice and retrieve the call.

Matt will tell the caller A that Paul is on another call or is away from his desk. Matt will either hang up to end the call or will transfer the call to Paul’s voicemail. To do that, Matt will dial pound key “#” twice and then “\*55” and then “292” which is Paul’s extension. This will transfer the call to Paul’s voicemail without ringing his desk.

## After Business Hours

Please follow this procedure for after hours call flow:

- ▶ Before leaving the office or reaching home, dial the speed dial key from your cell/landline (which will dial 267-932-7499) and then enter “\*12” to activate Apptix Anywhere service. This is very important for seamless transition of calls between one end user to another in the evening.
- ▶ When David answers the call, he will follow the same procedure. He will dial “#” twice from his cell/landline number and then dial extension of the end user where he wants to transfer the call.