Hosted Business Voice

RECEPTIONIST CONSOLE USER GUIDE

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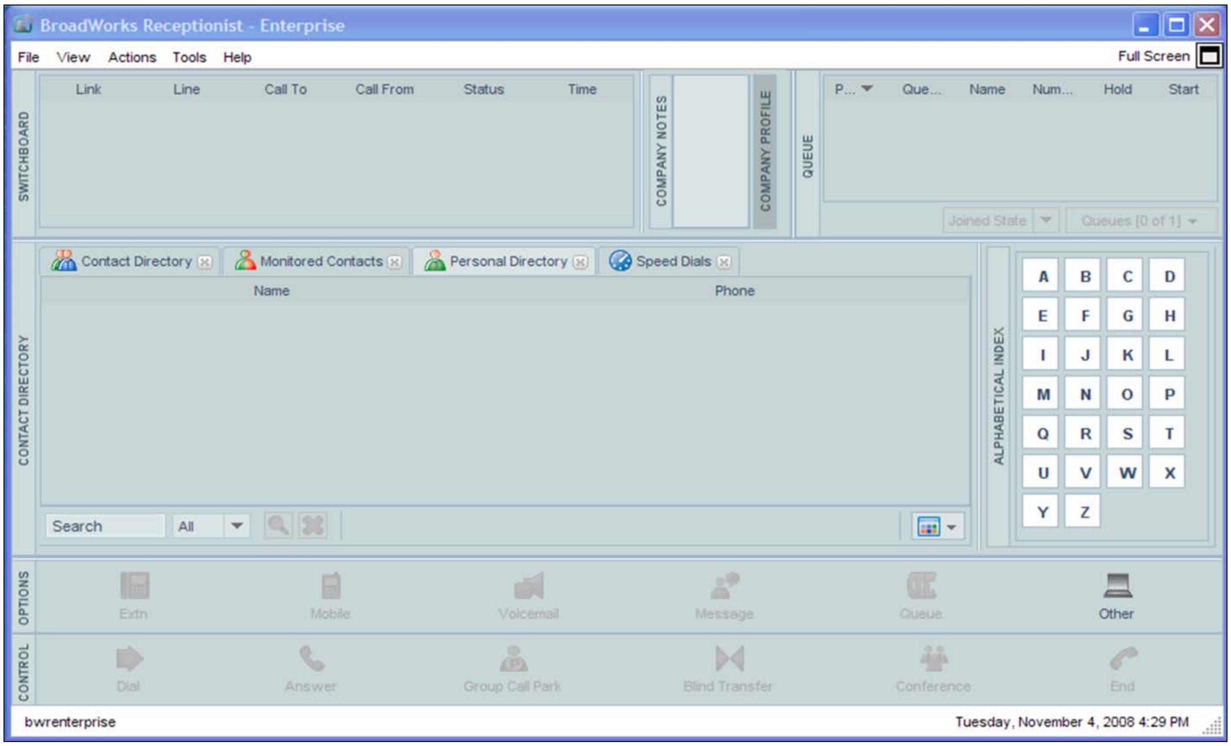
1. Receptionist Console Components



1.1 Dial Contact

1. In the *Contact Directory* panel, select a directory.
2. Select the contact to call.
3. Select the option you want to use for this contact.
4. In the *Control* panel, click **Dial.** The call appears on the Switchboard as “Ringing Out”.

NOTE 1: Alternatively, double-click a contact to dial the contact’s default option (extension, mobile, voicemail, in order of availability).

NOTE 2: To make a call via Speed Dial, select a contact from the Speed Dial directory.

1.2 Dial Ad Hoc Number

1. In the Options panel, click **Other.**
2. Type the number on the keyboard or select the digits from the dial pad.
3. In the Control panel, click **Dial.** The call appears on the Switchboard as “Ringing Out”.

1.3 Dial from Call History

1. On the *Menu* bar, select *Tools* and then *Call History*.
2. Select the Call History page you want.
3. Click the phone number you want to dial.

1.4 Answer Call

1. On the *Switchboard*, select the call to answer.
2. In the *Control* panel, click **Answer.**

NOTE 1: You can answer the longest waiting incoming call by clicking the space bar key.
NOTE 2: Consecutive presses of the space bar place the previous active call on hold and answer the oldest incoming call.

1.5 Hold Call

1. On the *Switchboard*, select the call to hold.
2. In the *Control* panel, click **Hold.** The call status changes to "On Hold".

1.6 Unhold Call

1. On the *Switchboard*, click the required held call.
2. In the Control panel, click **Unhold.**

1.7 End Call

1. On the *Switchboard*, select the call to release.
2. In the *Control* panel, click **End.** The call is terminated and removed from the *Switchboard.*

1.8 Blind Transfer

Calls can be blind transferred while active, held, or ringing (in).

1. On the *Switchboard*, click the call to transfer.
2. Select a directory and then the target contact.
3. Select the option you want.
4. On the *Control* panel, click **Blind Transfer**.

5. If the target contact is busy, the call is camped. If you do not have the Camp On service assigned, it reverts to performing a client-side Camp On, which is equivalent to a directed hold.

NOTE: Alternatively, to transfer a call, drag it from the Switchboard to a contact in your Contact Directory or Customized Directory.

1.9 Supervised Transfer

Only active calls can be transferred with supervision.

1. Make sure the call in answered and active.
2. Dial the number you want to transfer the call over to. The first call is held and both calls are linked on the Switchboard.
3. On the Control panel, click Consulted Transfer.

NOTE: If the number is busy, you can retry or dial another contact.

1.10 Consulted Transfer

Calls can be consult-transferred while active, held, or ringing (out).

1. Dial the contact you want to transfer the call to. The call appears on the *Switchboard*.
2. Consult with the caller.
3. On the *Switchboard*, click in the *Link* column of the two calls to be connected.
4. In the *Control* panel, click **Consulted Transfer.**

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

1.11 Transfer to Voicemail

1. On the *Switchboard*, select the call to transfer.
2. Select a directory and then the target contact.
3. In the *Options* panel, click **Voicemail.**
4. In the *Control* panel, click **Voicemail Transfer.** The calling party is transferred to the contact's voicemail.

NOTE: To transfer the call to your voicemail, select yourself.

1.12 Transfer to Queue (Enterprise Edition)

1. On the *Switchboard*, click on the call to transfer.
2. In the Options panel, click Queue.
3. In the pop-up menu that appears, select:

- Front of Queue to move the call to the front of the queue.
- Back of Queue to move the call to the back of the queue.

4. In the Control panel, click Queue Transfer.

1.13 Busy Camp On (Enterprise and Small Business Editions)

This feature has two mutually exclusive modes: client or service managed. The mode you have depends on your setup. You camp external calls trying to reach a busy extension.
To camp a call in either mode:

1. On the *Switchboard*, select the call to camp.
2. Drag the call to the target busy call in your Contact Directory or Customized Directory.
3. The call is held. Receptionist automatically transfers the call once the camped-on contact becomes available.

Client Managed

In this mode, the call shows as “Camped” on the Switchboard, which you can uncamp. The call blinks every 45 seconds until answered or ended.
To uncamp a camped call:

1. On the *Switchboard*, select the target call.
2. In the *Control* panel, click **Uncamp.**
3. The call status on the *Switchboard* changes to “On hold.”

Service Managed

In this mode, BroadWorks manages the call. Once camped, the call is removed from the *Switchboard.* After a specified time, the call is recalled to your phone and shows on the *Switchboard* as “Recalled.”

1.14 Group Call Park (Enterprise Edition)

This feature searches within a pre-defined hunt group for an available line to park a call.

1. On the *Switchboard*, select an active or held call.
2. In the *Control* panel, click **Group Call Park.** The call status changes to “Parked” with the parked extension in brackets. The call is released after the displayed time expires or the parked announcement (if selected) has finished. After a designated time, the call is recalled to your phone.

1.15 Directed Call Pickup

This feature allows you to answer a call on another person’s behalf.

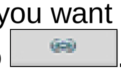
1. In the *Contact Directory* panel, select the contact. The contact's status must be "Ringing".
2. In the *Control* panel, click **Call Pickup.** The call appears on the *Switchboard* with the status "Active."

1.16 Call Barge-In

This feature allows you to enter an already established call between two people.

1. In the *Contact Directory* panel, select the contact you want to barge in on. The contact status must be "Off-Hook".
2. In the *Control* panel, click **Call Barge-In.** The call appears on the *Switchboard* as a "Conference."

1.17 Start Conference Call

1. On the *Switchboard*, select the two calls you want to start a conference with.
2. Click their *Link* columns. They change to .
3. In the *Control* panel, click **Conference.**
4. The status of both calls is "Active" and their link column changes to .

1.18 Hold Conference

On the *Control* panel, click **Hold Conference.** The status of calls in the conference changes to "On Hold" and their *Link* column changes to. 

1.19 Unhold Conference

On the *Control* panel, click **Unhold Conference.** The status of both calls changes to "Active".

1.20 Leave Conference

On the *Control* panel, click **Leave Conference Call.** The two other parties in the conference stay connected but are removed from the *Switchboard.*

1.21 End Conference

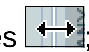
On the *Control* panel, click **End Conference.** The calls are terminated and removed from the *Switchboard.*

1.22 View Company Notes (Enterprise Edition)

To show or hide the Company Notes area, from the *Menu* bar, select *View* and then select or deselect Company Information.

1.23 Keep Company Notes (Enterprise Edition)

To modify the content of the Company Notes or Company Profile:

1. In the Company Notes area, click the COMPANY NOTES or the COMPANY PROFILE slider.
2. To resize the area, move the mouse cursor to the left until it becomes ; then drag it left or right.
3. Click the text area and type to change content.
4. The content is saved and is available between login sessions.

1.24 Configure Messaging (Enterprise Edition)

1. On the *Menu* bar, select Tools and then *Options*.
2. In the *Options* dialog-box, select *Messaging*.
3. Select *Enable Email Messaging.*
4. Enter the following information: Display Name (the name you want recipients to see), Reply-to-Address (your email address), and **SMTP Host** (your SMTP host address).

1.25 Message Contact (Enterprise Edition)

You can send messages to contacts that have an email address configured in BroadWorks.

1. In the *Contact Directory* panel, click the target contact.
2. In the Options panel, click **Message.**
3. In the top area of the Message pop-up window, enter or modify the message subject.
4. In the message area, enter the message text.
5. In the *Control* panel, click **Send.**

1.26 View Call Statistics (Enterprise Edition)

1. On the *Menu* bar, select *Tools* and then *Call History.*
2. In the *Call History* dialog-box, select *Other.*

1.27 View Call Logs

1. In the *Menu* bar, select *Tools* and then *Call History*.
2. To see the dialed calls, select *Dialed Calls.*
3. To see the received calls, select *Received Calls.*
4. To see the missed calls, select *Missed Calls.*

1.28 Delete Call Logs

1. From the *Menu* bar, select *Tools* and then select *Call History.*
2. Select *Dialed Calls, Received Calls,* or *Missed Calls.* To select consecutive entries, hold down SHIFT while selecting the calls. To select multiple non-contiguous calls, hold down CTRL and select the desired calls. To select all calls, click **Select All.**
3. Click **Clear** and then confirm your action.

1.29 Configure Day/Night Mode (Enterprise and Small Business Editions)

The *Day/Night* tab allows you to configure the *Day/Night* Mode call settings. This is useful to turn on at the end of your work day to forward calls either to another number or to your voicemail.

1. From the *Menu* bar, select *Tools* and then *Options.*
2. In the Options dialog-box, select *Day/Night Mode.*
3. To transfer your calls, select *"Night Mode."*
4. Select "Forward Calls To" and specify the phone number where you want to forward your calls. Or select "Forward calls to voicemail."
5. To return to the day mode, deselect "Night Mode."

1.30 Get Help

To get additional help on using Receptionist, on the Menu bar, select *Help* and then select *User Guide.* This opens a PDF version of the *Receptionist User Guide.*

2. Receptionist Interface

The main elements of the Receptionist interface are as follows:

2.1 Switchboard

The *Switchboard* panel (herein referred to as Switchboard) is where you manage calls. It contains the following columns:

- **Link** – Lets you select the calls to be linked and indicates the activation of the corresponding feature.
- **Line** – Shows the order that the calls come in.
- **Call To** – Identifies by name or number the party being called.
- **Call From** – Indentifies by name or number of the person calling you.
- **Status** – Shows the status of calls as follows:

Call Status	Represented as
Active	Active
Held	On Hold (00:00) *(blinks after 45 seconds)*
Camp On	Camped (Extension) *(blinks after 45 seconds)*
Remote Held	Active
Ringing In (Remote)	Incoming
Ringing In (Local)	Incoming
Ringing Out	Outgoing

- **Time** – Displays the duration of the call, including the Ring Time, Hold Time, and Talk Time.

2.2 Contact Directory Panel

The *Contact Directory* panel lists available contact directories and shows contacts in the selected directory. The information you see depends on your version of Receptionist, your setup, and the directory you choose. You use the *Contact Directory* panel to select and manage directory contacts.

2.3 Options Panel

The *Options* panel allows you to choose call options. Only the options currently available are highlighted. The possible options, shown as buttons, are as follows:

- **Extn** – Select to use the contact's extension (used by default).
- **Phone** – Select to use the contact's phone number.
- **Mobile** – Select to use the contact's mobile number.
- **Voicemail** – Select to use the contact's voicemail.
- **Other** – Select to dial an ad hoc number.
- **Messenger** (Enterprise Edition) – Use to send an email.
- **Queue** (Enterprise Edition) – Use to send a call to a queue.

2.4 Control Panel

The *Control* panel is used to manage calls. The available controls depend on your edition of Receptionist, your setup, and the call context. They are explained in the context where they are used.

2.5 Company Notes (Enterprise Edition)

The *Company Notes* area allows you to keep notes. They are explained in the context where they are used.

2.6 Queue Panel (Enterprise Edition)

The *Queue* panel is used to manage queues. It is explained in the context where it is used.

2.7 Alphabetical Index (Enterprise Edition)

The *Alphabetical Index* area allows you to quickly filter calls. It is explained in the context where it is used.

3. Directories

Directories contain lists of contacts and are represented as tabs at the top of the *Contact Directory* panel. The directories you see depend on your Receptionist edition and setup.

3.1 Views

Directories can be consulted in two views as follows:

- **List view** – Provides basic information about each contact in a single column.
- **Details view** (Enterprise Edition) – Provides detailed information about each contact.
-

You can toggle between the two views using the View menu at the bottom-right of the Contact Directory panel.

3.2 Contact Status

Some directories display the call status information about a contact. The possible options are: available to receive a call, on a call/busy, ringing, do not disturb, private, forward always, and not available.

3.3 Contact Directory

The **Contact Directory** is configured by your enterprise or group administrator. It contains contacts in your enterprise or group.

3.4 Contact Directory – Detailed View (Enterprise Edition)

The information provided about each contact depends on your setup. Typically, the following information is provided:

- **Status** – The call status of a user.
- **Last Name** – The contact's last name.
- **First Name** – The contact's first name.
- **Phone** – The contact's phone number.
- **Mobile** – The contact's mobile phone number.
- **Department** – The contact's corporate department or section.
- **Notes** – Allows you to write notes about the contact.

3.5 Personal Directory

The **Personal Directory** contains all contacts in your personal directory on BroadWorks. It allows you to create your own list of frequently called numbers. To add contacts to your Personal Directory, log in to your BroadWorks web portal and go to the *Outgoing Calls – Personal Phone List* configuration page.

3.6 Monitored Contacts

The **Monitored Contacts** directory contains contacts whose phone status you are currently monitoring. It is configured on the web portal (and restricted to 30 users company-wide in the Small Business Edition and to eight users group-wide in the Office Edition).

3.7 Speed Dials

The **Speed Dials** directory lists all speed dial numbers configured for you or by you for your Speed Dial service.

3.8 LDAP Directory (Enterprise Edition)

The **LDAP Directory** is a list of contacts from your enterprise LDAP directory. If this feature is not configured, the directory is not visible.

3.9 Outlook Directory (Enterprise Edition)

The **Outlook Directory** is a list of your Outlook contacts and their details. If this feature is not configured, the directory is not visible.

3.10 Custom Directory (Enterprise Edition)

You may have more than one custom directory. These directories are created and customized by your enterprise or group administrator. In addition, you can create your own custom directories using the search capability. A custom directory has the same characteristics as the directory from which it was created.

4. Managing Directories

4.1 Show Directory Tab

To show or hide a directory tab in the *Contact Directory* panel:

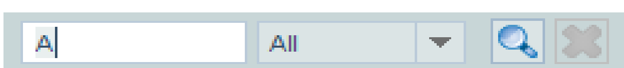
1. From the Menu bar, select *View* and then select Directories.
2. In the *Directories* drop-down list, check directories you want to show and uncheck directories you want to hide.

4.2 Display Directory Contents

To display the contents of a directory, in the *Contact Directory* panel, click the directory tab.

4.3 Search Directory

1. Select the directory where you want to conduct your search.
2. Enter a string by which you want to search in the Search dialog box at the bottom-left of the *Contact Directory* panel.



3. Select a category 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** . Receptionist displays the contacts matching the search criteria in the selected directory.
5. To return to the full directory, click **Reset** .

4.4 Create Custom Filter (Enterprise Edition)

1. Repeat steps 1 to 3 of the Search Directory procedure.

2. Click CTRL **Search.** The new directory name is the name of the original directory with the search keyword appended.

4.5 Order Directory Entries (Enterprise Edition)

To order directory entries by column:

1. Click the column name. The entries are arranged in ascending order for that column.
2. Click the column name again to display the entries in descending order.

4.6 Filter Directory Alphabetically (Enterprise Edition)

1. Select the directory you want to filter.
2. Click the name of the column by which you want to filter.
3. In the *Alphabetical Index* area, click the letter you want. Receptionist displays only those entries whose first alphabetical column starts with the selected letter.
4. To return to the original view, click the letter again.

4.7 Edit Contact Notes (Enterprise Edition)

1. In the *Contact Directory* panel, select the target contact.
2. Click **Edit** at the bottom-right of the panel.
3. In the *Edit* dialog box, enter the information you want.

4.8 Add Speed Dial Entry

1. In the *Contact Directory* panel, select the *Speed Dials* tab.
2. Click **Add** .
3. In the Add dialog box, select the speed dial key (#00 – #99) from the *Key* drop-down list.
4. Enter the contact phone number and the description that identifies the contact for you.

4.9 Edit Speed Dial Entry

1. In the *Speed Dials* directory, select the entry to edit.
2. Click **Edit** .
3. In the Edit dialog box, modify the contact information.

4.10 Delete Speed Dial Entry

1. In the *Speed Dials* directory, select the entry to edit.

2. Click **Delete** and then confirm your action.

5. Managing Queues

5.1 View Queue Panel
To show or hide the *Queue* panel, from the *Menu* bar, select *View* and then select or deselect *Queue.*

5.2 Select Queues to Manage
To show or hide the *Queue* panel:

1. From the *Menu* bar, select Tools and then select *Options.*
2. Click the *Queues* tab.
3. Under *Queue Management*, select the *Manage* box, next to each queue you want to manage.

5.3 Receive Calls from Queues
To start or stop receiving calls from the queues, from the *Joined* drop-down list in the Queue panel, select *Join* to receive calls from the queues, configured using Tools – Options – Queues dialog, or *Unjoin* to stop receiving them.

5.4 Display Calls
To monitor calls in queues you have to display them in the *Queue* panel. To display or filter our queues, in the *Queues* drop-down list, at the bottom of the *Queue* panel, check the queues you want to monitor and uncheck the queues you want to filter out. To display calls from all queues, check *All Queues.*

5.5 Change Position of Calls
To change the position of a call in the *Queue* panel:

1. In the *Queue* panel, select the *Pos* column of the call you want to reposition.
2. From the drop-down list, containing the available positions for the call, select the position you want.
3. Click **Apply** to reposition the call. Click **Reset** to cancel your changes.

6. Keyboard Shortcuts

General and Menu Bar Control Keys	
ESCAPE	Exit from the active window.
Ctrl + P	Toggle between Company Notes and Company Profile.

Alt + O	Display Options dialog box.
Alt + R	Display Call History dialog box.
Alt + H	Open BroadWorks Receptionist User Guide.
Alt + L	Log out and return to the Login screen.
F11	Toggle full screen mode on and off.
Switchboard	
Ctrl + F1…F10	Click the Link column of the first through the tenth call.
Shift + F1…F10	Click the first through to the tenth call.

Contact Directory Panel	
Ctrl + F	Click the Search box for a keyword search.
Ctrl + R	Click Reset.
Ctrl + Shift + <alpha>	Enter a letter in the Search box and then select the first alphabetical search filter category.
Ctrl + S	Toggle between the List and Details view.
Ctrl + UP/DOWN	Select the next category from the Search Filter.
UP/DOWN ARROW	Go one entry up or down in the contact list.
UP/DOWN/RIGHT/ LEFTARROW	Move around the contact list in List view.
Page UP/DOWN	Scroll to the next or previous page in the contact list.

Options Panel	
<Number Pad />	Select extension.
<Number Pad *>	Click Mobile.
<Number Pad ->	Click Voicemail.
Home	Click Messenger.
<Number Pad 0,1…9>	Enter a number from 0 through 9.

Control Panel	
ENTER	Click Dial.
+	Click Transfer.
Shift + <Number Pad +>	Click Camp On/Camp Off.
.	Click End.
Space Bar	Answer the longest waiting incoming call.

F1…F10	Answer/Hold/Unhold the first through to the tenth call on the Switchboard (depending on call status).
Shift + Ctrl + F1…F10 OR <Number Pad/Del>	End the first through to the tenth call on the Switchboard.
<Number Pad +>	Click Blind Transfer/Consult Transfer/Queue Transfer/Voicemail Transfer.
Ctrl + <Number Pad +>	Click Conference/Call Pickup/Barge-In.
Ctrl + Alt + <Number Pad +>	Click Conference Hold/Conference Unhold.
Ctrl + Shift + <Number Pad +>	Click End Conference.
Ctrl + Alt + Shift + <Number Pad +>	Click Exit Conference.