Receptionist Console – Enterprise

Receptionist Console – Overview

The Receptionist console is a browser-based app that supports line-monitoring status, directory search, and advanced call management functions, including Camp On, Call Park and Conferencing.

Receptionists use it to:

› Answer and manage incoming calls

› View the status of Favorites (Monitored Users)

› Monitor up to 200 lines

Receptionist Console – Benefits

› Easy-to-use graphical console

› Customizable directories (show/hide)

› Intuitive Call Management – options are displayed inline once the target contact is selected (e.g. Transfer, Call, Extension, Mobile)

› Monitor select contacts from Enterprise directory

› Email contacts

Receptionist Console – Call Control Features

› **Call Management** – Answer, dial, hold, conference, blind and attended transfer.

› **Drag and Drop Call Transfer** – Use mouse to manage calls.

› **Line Monitoring** – Line states include on-hook, off-hook, ringing, DND, Privacy and Call Forwarding Always.

› **Camp On with Recall** – Perform a directed hold when called party is busy.

› **Directed Call Pickup** – Pickup any ringing extension.

› **Voicemail Transfer** – Transfer calls directly to voicemail.

› **Call Barge-In** – Operator intrusion on a busy line.

› **Group Call Park** – Initiate line hunting on incoming calls directed to a department or group (e.g. support, sales).

› **Messaging** – Send emails to contacts from desktop screen.

› **Call History** – Logs outgoing, received and missed calls.

› **Call Statistics** – Average hold time, transfer count.

Receptionist Console – Directory Features

› **Supports Multiple Directories** – Group, Monitored, Custom, LDAP, Outlook and Speed Dials.

› **Custom Contact Directories** – Define multiple custom directories.

› **Monitored Contacts** – Define a custom directory that contains a subset of group-wide directories

› **Outlook Calling Name ID** – Use Outlook Directory for incoming Caller ID name.

› **Speed Dials** – Search and call numbers from a list of up to 100 speed dials.

› **Keyword Contact Search** – Search by name, number (extension or mobile).

Voice Manager with Receptionist

› If you purchased a Receptionist seat from MegaPath, you will see Receptionist listed under "Software".
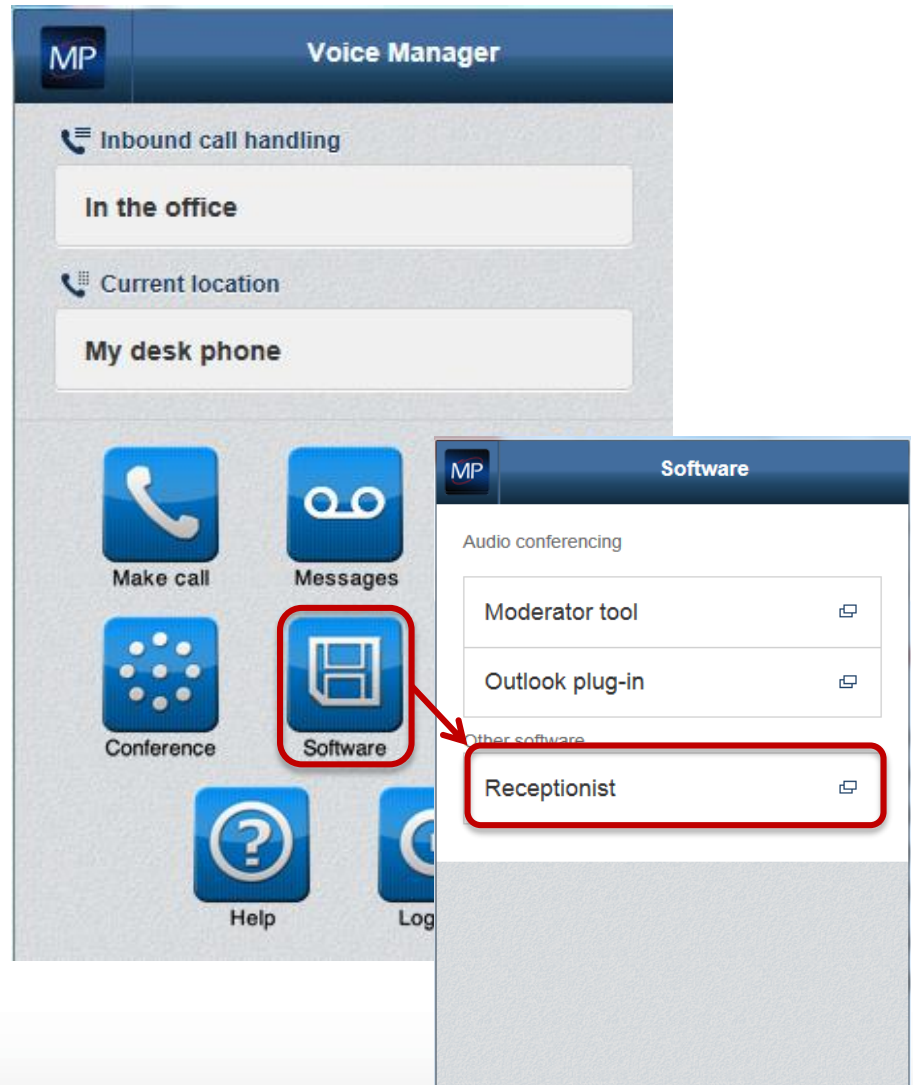
Receptionist Console – Voice Manager Launch

› Click the Receptionist icon within the Voice Manager.

› Sign in to Receptionist using your Voice Manager credentials.
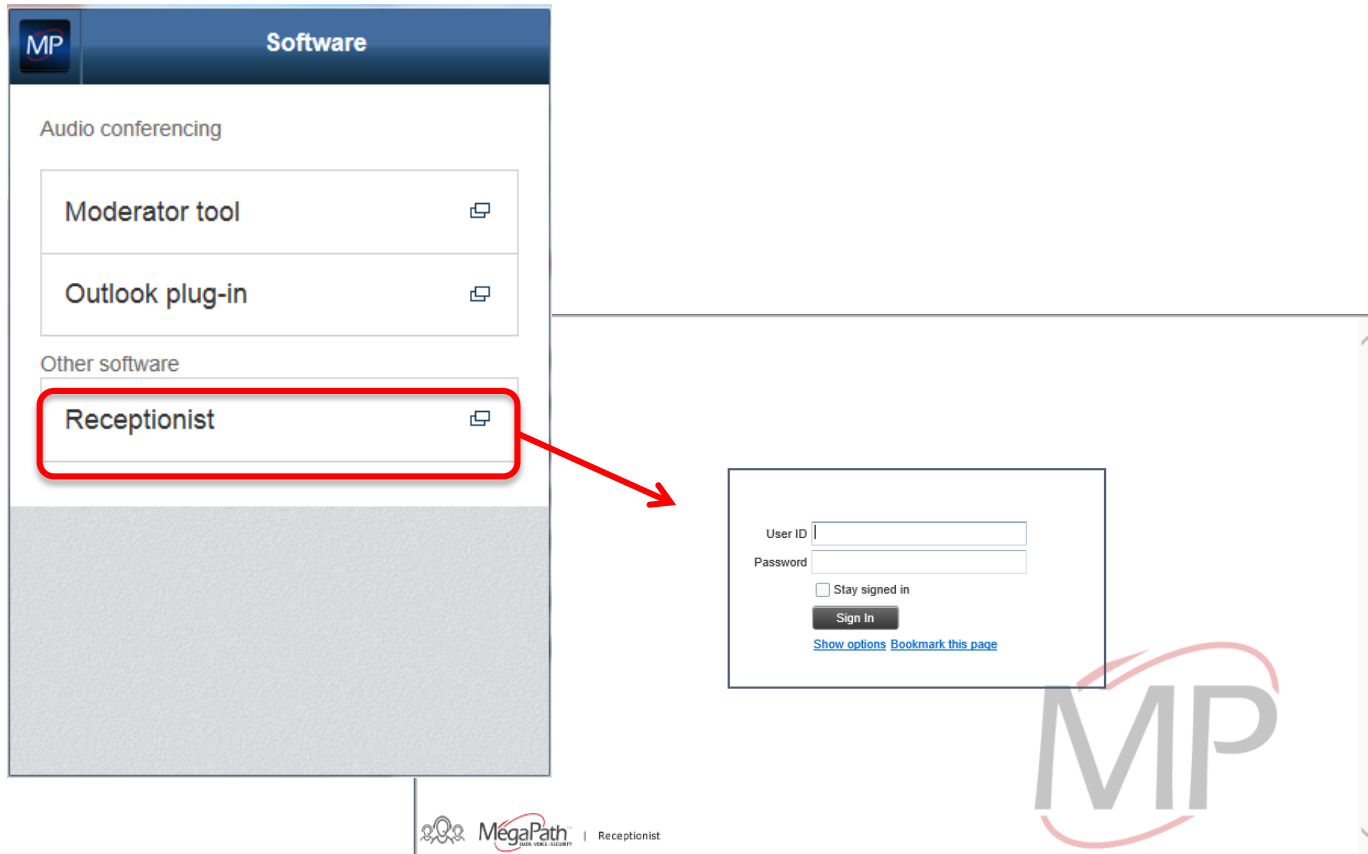
Receptionist Console – Voice Administration Launch

› From Voice Administration, use the Launch dropdown.

› Select Receptionist

› Single sign on

Receptionist Console – Console Components

1. **CALL CONSOLE** – Shows incoming/active calls & conference calls
2. **CONTACTS** – Search function and contact lists

To hide a contact tab, click the "x" on the tab. To show hidden tabs, click the icon shown below.

Receptionist Console – Controls

Name	Description
Common Controls	
Expand/Collapse	Shows or hides the contents of a window or panel.
Close	Closes an interface element, such as window, pane or panel.
Edit	Allows you to edit contacts in some directories.
Call Console Controls	
Call History	Displays your call logs.
END Conference	End a conference call.
Leave Conference	Leave conference but allow participants to continue.
Hold Conference	Places a conference on hold.
Pull Out	Places the results of a search performed on a contacts directory in a new tab.
Clear	Clear the search results and displays the entire directory.

Receptionist Console – Contact Directories

Directory Name	Contents	Comments
Favorites	Contacts whose phone status you are currently monitoring. The list of contacts must be configured for you or by you in the Customer Portal (Voice Administration).	Monitor up to 200 contacts (Favorites) enterprise-wide
Group/Enterprise	All contacts in your Group or Enterprise directory. You can access your Enterprise Directory in the Customer Portal (Voice Administration)	Dynamically monitor up to 100 contacts in your Group/Enterprise directory.
Group/Enterprise Common	All contacts in your Group or Enterprise's common phone list configured by your Voice Administrator in the Customer Portal (Voice Administration).	This directory may be empty if your Voice Administrator has not configured any contacts.
Monitored Contacts	Consists of phone status you are dynamically monitoring.	If the directory is empty, it is not shown.
Personal	Contacts configured by you in the Customer Portal (Voice Administration).	
Speed Dial	Consists of all speed dial codes configured for you or by you for your Speed Dial service.	Speed Dial 100 service needs to be assigned.
Queues	Consists of call centers and associated numbers that you are staffing as an agent or supervising. It allows you to transfer calls into queues quickly.	Not currently supported.
LDAP (search only)	Consists of users found in the configured LDAP directory.	The directory needs to be configured by your system administrator, otherwise it is not visible.
Custom	Consists of contacts in your customer contact directories configured by your administrator in the Customer Portal (Voice Administration).	You may not have any custom contact directories or you may have several.
Outlook	Consists of all your Outlook contacts.	

Receptionist Console – Call Status

The Call Status icon is available in some directories, in both List and Details view, and shows the contact's phone on-hook/off-hook state.

Phone State	Icon	Description
Idle	🟢	This is when the contact's phone is on-hook (available to receive a call).
Busy	🔴	This is when the contact's phone is off-hook (on a call, busy).
Ringing	🟡	This is when the contact's phone is ringing.
Do Not Disturb	⛔	This is when the contact has the Do Not Disturb service turned on.
Private	🔒	This is when the contact has enabled their Privacy feature. **NOTE:** This terminates monitoring of the contact's phone state for the current login session. To be able to monitor their phone state again, you must sign out and then sign in after the contact has disabled their phone state privacy.
Call Forwarding Always	➡	This is when the contact has the Call Forwarding Always service turned on.
Unknown	⚪	The contact is not monitored. **NOTE:** Virtual users cannot be monitored.

Receptionist Console – Call States

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, End, Park, Camp, Conference
On Hold	Held		Any	Transfer, Resume, End, Park, Camp, 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)	Call Recalled		Terminator	Answer, Conference, End
Parked Call	Parked (<DN>)		Any	Answer, End

Receptionist – Action Buttons

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.
Redial	This redials the last dialed number.
EXT Extension	This dials the contact's extension.
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	This transfers a call to an ad hoc number entered in the Dialer.
TRF Transfer	This transfers a call to a selected number or contact.
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.

Receptionist Console – Answer & End Calls

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** ANS . The call state changes to *Active*.

To end a call:

› Click **End** END for that call.

Receptionist Console – Incoming Call

Incoming Call – Click **ANS** to answer or **END** to send the call to Voicemail.

Receptionist Console – Active Call

Receptionist Console – Active Call Treatment Options

Receptionist Console – Call Hold and Resume Held Call

To put a call on hold:

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

To resume a held call:

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

Receptionist Console – Contact Call/Email Options

Click a Contact to:

› Call their 10-digit phone number
› Call their Extension
› Call their Mobile
› Email

Receptionist Console – Warm Transfer

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** TRF.

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

Receptionist Console – Blind Transfer

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** 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** TRF for that contact.

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

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

Receptionist Console – Barge-in

Call Barge-in allows you to barge in on a 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** BARGE . 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. You can now perform any conference operation on the call.

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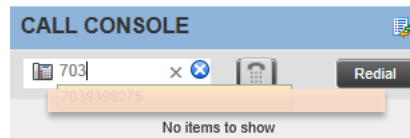
contact.

# Receptionist Console – Placing Calls/Redial

To Place a Call:
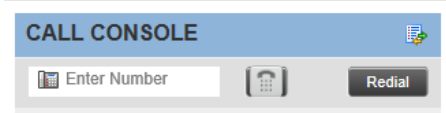
1. In the *Dialer*, enter the phone number

2. Click **Dial** 📞. The call appears in the *Call Console* as *Incoming Local* and your phone rings.

To redial a recently dialed number:

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

2. Select the number to dial and click **Dial** 📞. Or click the Redial button Redial, and select a number from the Redial list.

To Place a Call from Call History:

1. Click the Call History icon
2. Click a number in the list
3. Click Call
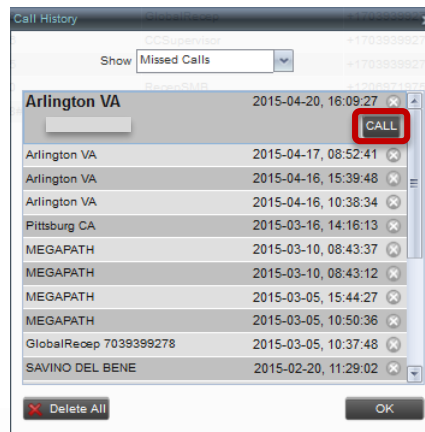
Receptionist Console – Add/Modify Personal Contacts

› You can modify Personal Contacts by clicking on the pencil (edit) icon on the Personal Contacts tab.

› Click the pencil icon to open the **Edit Personal Contacts** window. Click the **Add** button to add a new contact. Click the **Delete** button to delete a contact.

› To add a new contact, click the **Add** button, enter the **Name** and **Number** and click **Add** again.

Receptionist Console – Contacts (Speed Dials)

You can modify a Speed Dial list by clicking on the edit icon on the Speed Dial tab.

Click the pencil icon to open the **Edit Speed Dials** window. Click the Add button to add a new code. Click the Delete button to delete a speed dial.

To add a new speed dial click the Add button, choose a speed dial code from the dropdown, enter the Phone Number and Description and click Add again.

Receptionist Console – Search Contacts

To search for contacts, click **Search** on the Contacts panel to display the search panel.
› Search all, by directory, Quick Search
› Enter search criteria in the search box, and then press enter on your keyboard or the search icon in the panel.
› Create Search Directory from directory or Quick Search

Note: To use the "Begins with" option, you will need to enter at least two characters.

Search all

You can search in a specific directory selecting the Contact tab.
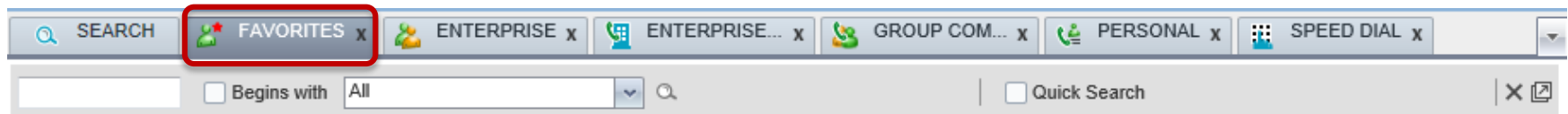
Search directory

Receptionist Console – Quick Search

To perform a quick search on a specific directory:
1. Click the directory tab where you want to perform the search.
2. Order the directory by the column that you want to search (Last Name in this example).
3. Check the *Quick Search* box.
4. From the keypad that appears, select a character (a single letter or digit) that you want to use in the 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.

Receptionist – Provisioning Monitored Users (Favorites)

› Log in to the Voice Manager

› Select **Settings**

› Select **Advanced Configuration** (a new window opens to display your Calling Features page)
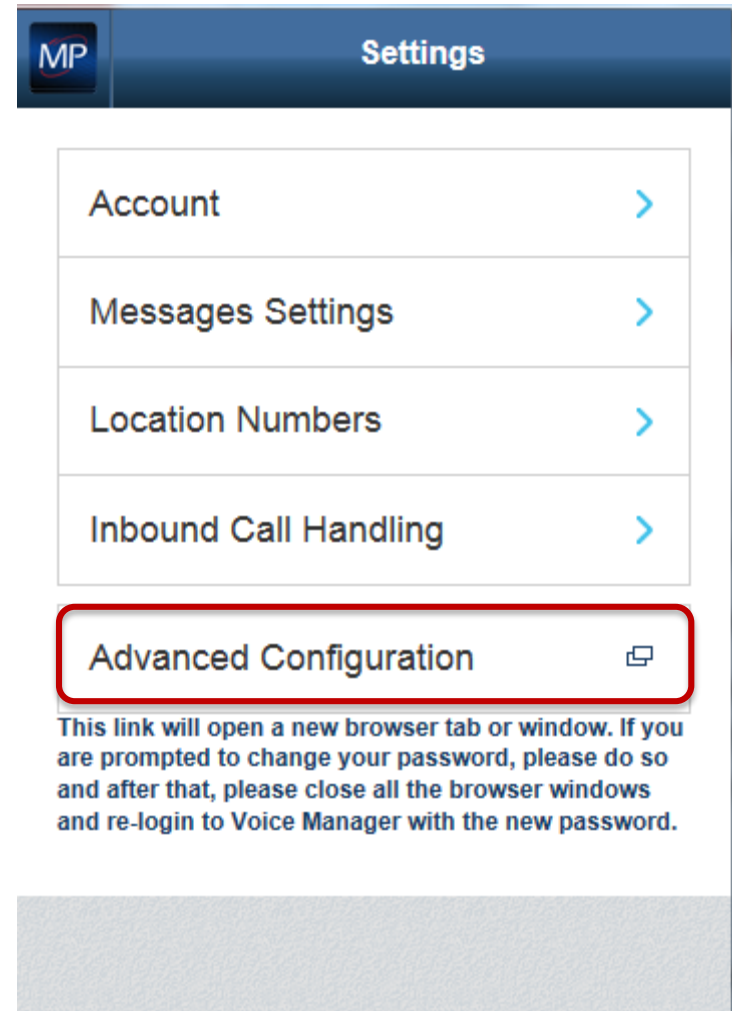
Receptionist – Provisioning Monitored Users (Favorites)

› Locate **Client Applications>Receptionist** (scroll down or use the Service type dropdown)

› Click **Edit**

› Add users to **Monitored Users** list

Note: Monitored Users display in the **Favorites** directory.

Receptionist – Provisioning Monitored Users (Favorites)

› Use the search boxes to locate individual users *OR*

› Click **Search** to display all users in the **Available Users** list

› Add Users to the **Monitored Users** list – these will display in the Receptionist under Favorites

› Click **Save**