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About MegaPath Receptionist

MegaPath Receptionist 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 (**Enterprise Edition**); 30 lines (Small Business Edition)

Receptionist features include:

- › **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). **Enterprise Edition**
- › **Messaging** – Send emails to contacts from desktop screen. **Enterprise Edition**
- › **Call History** – Log outgoing, received and missed calls.
- › **Call Statistics** – Average hold time, transfer count.

Requirements for Running Receptionist Console

Operating System

MegaPath Receptionist is meant to be used on a Microsoft Windows platform.

Hardware Requirements

The hardware requirements for the Microsoft Windows platform include:

- › 1.2 GHz or higher Pentium 3 or compatible CPU
- › 512 megabytes (MB) of RAM recommended minimum; more memory generally improves performance
- › 60 MB available hard disk space
- › Video graphics card with minimum of 8 MB of RAM
- › Super VGA monitor (15 inches or larger)
- › 1024 x 768 minimum screen resolution
- › HTTP(s) connectivity to the MegaPath Web Servers

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Software Requirements

The software requirements include:

- › Windows XP with SP3 (or higher), Windows Vista, Windows 7, Mac OS X, 10.5, 10.6, or Citrix XenApp 4, 5, and 6
- › Sun Microsystems 32-bit Java 6 Update 19 (or later) Runtime edition only
- › Outlook 2002/XP SP2, 2003, 2007, 2010—Required for Outlook contact directory
- › Flash Player 9 Runtime (ActiveX Control)
- › Internet Explorer 7.0, 8.0, 9.0 or 10.0; Firefox 3.5 through 20; Google Chrome 22 or later; or Safari 4 and 5

NOTE: Firefox 20 works with JRE 1.7.10 and earlier.

Browser JavaScript Requirements:

JavaScript must be enabled on Internet Explorer.

Open Internet Explorer.

1. Click the **Tools** button.
2. From the drop-down list, select *Internet Options*.
3. Select the *Security* tab.
4. Select the **Internet Zone**.
5. Click the **Custom level...** button.
6. In the *Scripting* category, select the **Enable** button for the *Active Scripting* subcategory.
7. In the *Scripting* category, click the **Enable** button for the *Allow status bar updates via script* subcategory.
8. Click the **Yes** button when prompted with a message box asking, *Are you sure you want to change the settings for this zone?*
9. Click **OK** in the *Internet Options* dialog *Security* tab.
10. Close and restart Internet Explorer.

NOTE: MegaPath recommends always using the latest available service pack/update for Windows, Mac OS X, Internet Explorer, Firefox, Safari, and Outlook.

Restrictions and Limitations:

A 32-bit web browser is required to launch the client from the MegaPath web portal.

This section lists restrictions and limitations of the Receptionist client.

- › In all browsers except Internet Explorer, the window running Receptionist does not focus on incoming calls.
- › Receptionist must be the only tab open when running Internet Explorer. Otherwise, the focusing window on incoming calls and Call Notification pop-up toasts do not work.
- › The browser window running Receptionist should be at least 800 x 600 pixels in size.
- › Due to technical limitations of Internet Explorer, the workspace preferences work only in Firefox.
- › When using the Firefox browser with plug-ins enabled, the following exception message may appear in the Java Console window if the application is reloaded (that is, the browser process terminates and is restarted). This does not cause any errors in the application and can be ignored.

Receptionist Console QRG

```

java.lang.ClassNotFoundException: dummy
at sun.plugin2.applet.Applet2ClassLoader.findClass(Unknown Source)
at sun.plugin2.applet.Plugin2ClassLoader.loadClass0(Unknown Source)
at sun.plugin2.applet.Plugin2ClassLoader.loadClass(Unknown Source)
at sun.plugin2.applet.Plugin2ClassLoader.loadClass(Unknown Source)
at java.lang.ClassLoader.loadClass(Unknown Source)
at sun.plugin2.applet.Plugin2ClassLoader.loadCode(Unknown Source)
at sun.plugin2.applet.Plugin2Manager.createApplet(Unknown Source)
at sun.plugin2.applet.Plugin2Manager$AppletExecutionRunnable.run(Unknown Source)
at java.lang.Thread.run(Unknown Source)

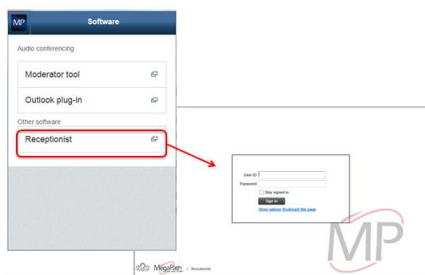
```

- › In Internet Explorer 8, the maximum number is 50 calls.
- › In Safari 5.0, Firefox 4.0, and Internet Explorer 9, the maximum number is 100 calls.
- › In Firefox 3.6.19 on Macintosh, when the user presses ENTER instead of the Sign In button to sign in to the Receptionist, a blank page appears.

Launch/Log in to the Receptionist Console

Voice Manager

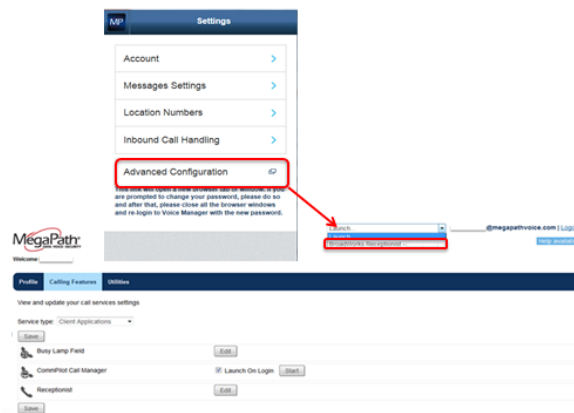
1. Log in to the Voice Manager
<https://mv.megapath.com>
2. Click Software
3. Click Receptionist
4. Enter your Voice Manager log in credentials



Voice Administration

Alternatively you can launch the application from the Customer Portal (Voice Administration>Calling Features>Call Control) if you are logged in.

1. Log in to the Voice Manager
<https://mv.megapath.com>
2. Click Settings
3. Click Advanced Configuration
4. On the top of Calling Features page locate the Launch dropdown
5. Select Broadworks Receptionist



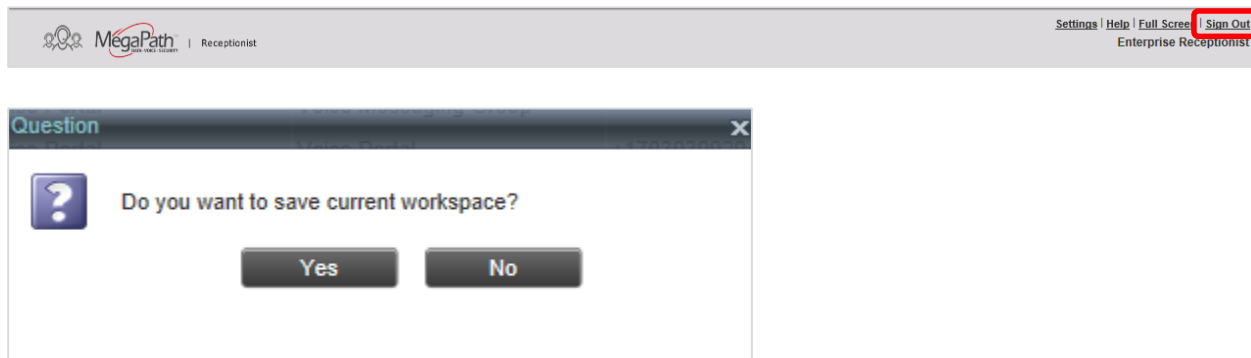
Receptionist Console QRG

The Receptionist will launch without the need for a second login.

Sign Out

To sign out of the client:

1. Tap **Sign Out** at the top of the console
2. You will be prompted to save your current workspace



Receptionist Console

The main elements of the Receptionist interface include:

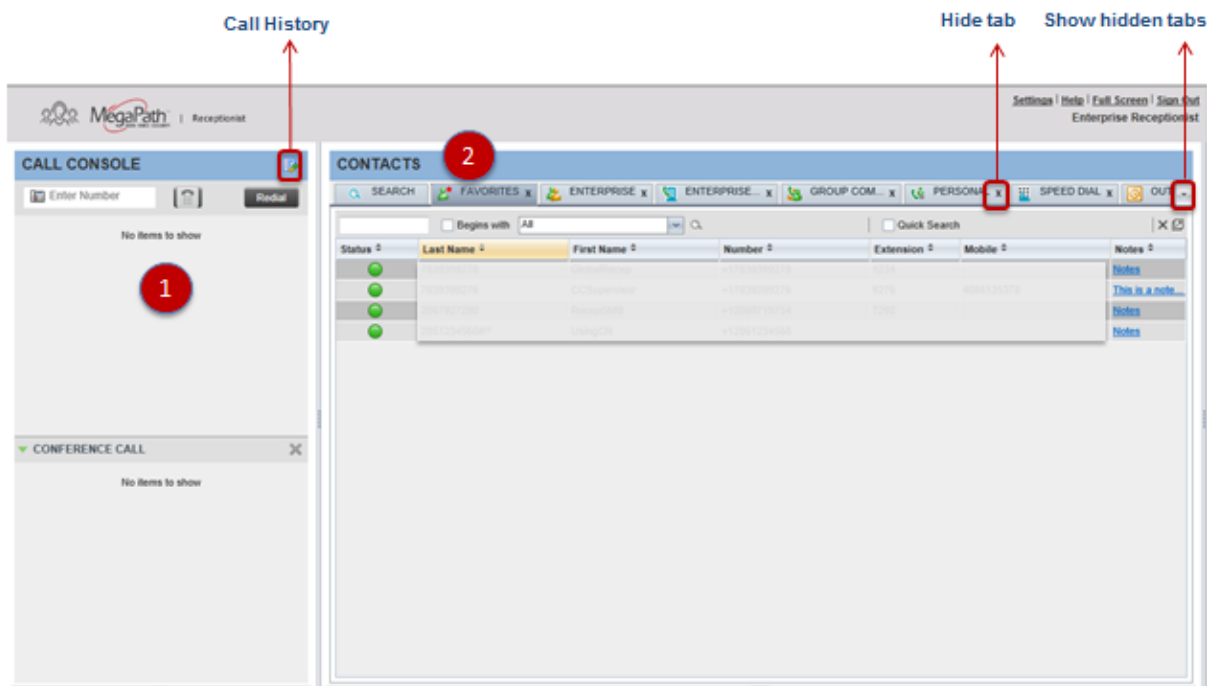
- › Call Console
- › Contacts Pane
- › Setting and Help Links

Receptionist Console QRG

The following diagram provides a quick overview of the Receptionist Console.

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.



Call Console

The *Call Console* is where you manage your current calls. It contains the following:

- › The main area of the *Call Console* lists your current calls and allows you to perform actions on them.
- › **Dialer** – This allows you to make ad hoc calls and redial up to 10 of the most recently dialed numbers.
- › **Conference panel** – This lists call legs of your current conference call and allows you to take actions on conference calls.

For each call, the name and the phone number of the remote party (if available), the call state, the duration of the call, and for held calls, the time the call has been on hold, are displayed.

Receptionist Console QRG

Contacts Pane

You use the *Contacts* pane to call, monitor, and manage your contacts. The pane lists available contact directories.

- › **Group/Enterprise** – Contacts in your enterprise or group
- › **Personal** – Contacts in your *Personal* directory on BroadWorks
- › **Favorites** – Contacts whose status you are (statically) monitoring, which are configured on the web portal
- › **Speed Dials** – Speed dial numbers configured for your Speed Dial 8 and/or Speed Dial 100 service
- › **Outlook** (**Enterprise Edition**) – Your Outlook contacts, if the Outlook feature is configured
- › **Custom** (**Enterprise Edition**) – Contacts in your custom directories on the web portal
- › **LDAP search results** (**Enterprise Edition**) – Read-only access to Lightweight Directory Access Protocol (LDAP) contacts via the Search feature, if the LDAP feature is configured

The *Contacts* pane also contains the **Search** and **Quick Search** features, which you use to search for contacts.

Settings and Help Links

- › The Settings link, when clicked, displays the *Settings* page, allowing you to configure Receptionist.
- › The Help link, when clicked, opens the *Hosted Receptionist User Guide* in PDF format.

Managing Calls

Dial Contact

1. In the *Contacts* pane, click the tab for the target directory.
2. Click the contact and then click **CALL** for that contact.
3. To dial an extension, click **EXT**, or to dial a mobile number, click **MOB**. The call appears in the *Call Console*.

Dial Ad Hoc Number



In the *Dialer*, enter the number and click **Dial**.

Redial Number

Up to 10 previously dialed numbers are available.

1. In the *Dialer*, click **Redial**. A list of recently called numbers appears.
2. From the list, select the number to call.

Receptionist Console QRG

Dial from Call History



1. In the *Call Console*, click **Call History**.
2. In the dialog box that appears, select *Placed Calls*, *Received Calls*, or *Missed Calls* from the *Show* drop-down list.
3. Click a call log and then click **Call** for that log.

View Current Calls

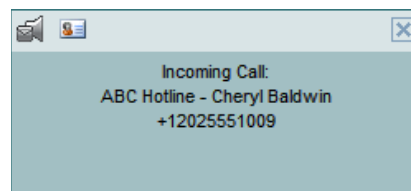


Your current calls are always visible.

To display the details of the conference call, click the **Expand** button in the *Conference Call* panel.

View Incoming Calls Details

If the Call Notification feature is enabled, a notification window appears when you receive a call, displaying the name and number of the caller.



Answer Call

In the *Call Console*, move the mouse over an incoming call and then click **ANS** for that call.

Hold Call

This function is not available from a remote office. In the *Call Console*, move the mouse over the call and then click **HOLD** for that call.

Resume Call

This function is not available from a remote office. In the *Call Console*, move the mouse over the call and then click **ANS**.

End Call



In the *Call Console*, click **END** for the call to end. The call is removed from the *Call 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.

Receptionist Console QRG

To blind transfer a call to an ad hoc number:

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

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

To blind transfer a call to a contact:

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

Attended (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*.

Supervised Transfer

To transfer an active inbound call with supervision:

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

Transfer to Voice Mail

1. In the *Call Console*, select the call to transfer.
2. In the *Contacts* pane, click a contact with voice mail (in the *Group/Enterprise* or *Favorites* directory) and then click **VM** for that contact.
3. To transfer the call to your own voicemail, select yourself.

Receptionist Console QRG

Camp on Busy Contact

You can camp external calls trying to reach a busy extension. The call is transferred when the destination becomes available.

1. In the *Call Console*, select the call to camp.
2. In the *Group/Enterprise* or *Favorites* directory, click a busy or ringing contact and then click **CAMP** for that contact. The call is camped and removed from the *Call Console*.
3. If the call timer expires before the call is answered, the call is recalled to your device and reappears in the *Call Console*.

Group Call Park (Enterprise Edition)

This feature searches within a predefined hunt group for an available line to park a call.

1. In the *Call Console*, click an active or held call and then click **PARK** for that call. The call is parked on an available extension and then removed from the *Call Console*.
2. If the call timer expires before the call is answered, the call is recalled to your device and reappears in the *Call Console*.

Directed Call Pickup

You can answer a call on behalf of another person.

1. In the *Contacts* pane, click the *Group/Enterprise* or *Favorites* tab.
2. Click a ringing contact and click **ANS**. The call appears in the *Call Console*.

Start Three-Way Conference

1. If necessary, place calls to participants.
2. In the *Call Console*, select one of the calls to conference.
3. Move the mouse over the non-selected call and then click **CONF**. The calls are moved to the *Conference Call* panel.

Hold Conference

To hold the conference, in the *Conference Call* panel header, click **HOLD**.

Hold or Resume Conference Participant

- › To place a participant on hold, click **HOLD** for the target call.
- › To resume a participant, click **ANS** for the target call.

Leave Conference

To leave the conference, click **LEAVE** in the *Conference Call* panel header. The other parties stay connected but the calls are removed from the *Conference Call* panel.

Note: that you can only leave a three-way conference.

End Conference

To end the conference, click **End** in the *Conference Call* panel header. The calls are terminated and removed from the *Conference Call* panel.

Receptionist Console QRG

Barge In on Call

1. Click the *Group/Enterprise* or *Favorites* tab.
2. Click a busy contact and then click **BARGE**. A three-way conference is established.

Sent E-mail to Contact (Enterprise Edition)

1. Click the *Group/Enterprise* or *Favorites* tab.
2. Click a contact with e-mail and then click **EMAIL**.
3. In the message window that appears, enter the required information and then click **Send**.

View Call History

1. In the *Call Console*, click **Call History**. The *Call History* dialog box displays your placed, received, and missed calls.
2. To view call logs in a group, select the group from the *Show* drop-down list.

Managing Contacts

Show Directories



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



3. To remove a directory tab from the *Contacts* pane, click the Close button on the tab for that directory.

Monitor Contacts Statically








The *Favorites* directory, configured in the Voice Administration portal, displays the phone status of contacts. This is called static monitoring.

Monitor Contacts Dynamically (Enterprise Edition)

Dynamic Monitoring allow you to view the call status of selected contacts in your *Group/Enterprise* directory. You must request that a contact be monitored. Selected contacts cannot be unselected. When the number of monitored contacts reaches the maximum limit (100), the first contact that was selected to be monitored is unselected and stops being monitored. The status of a contact that is not monitored is shown as *Unknown*.

Receptionist Console QRG

Phone States

| | |
|---|------------------------------|
|  | Available/Idle |
|  | Busy |
|  | Ringing |
|  | Do Not Disturb |
|  | Privacy (Enterprise Edition) |
|  | Forwarding |
|  | Unknown |

Make Notes about Contact (Enterprise Edition)

You can make notes about contacts in the *Group/Enterprise* directory.

1. Expand the *Group/Enterprise* panel.
2. Click a contact to expand it.
3. Click the **Notes** link for the contact.
4. Enter or modify information in the *Notes for <Contact Name>* dialog box.
5. To save your changes and close the dialog box, click **OK**.
6. To close the dialog box without saving, click **Cancel**.

View Contact Details

Click the target directory tab and then click a contact.

Manage Speed Dial and Personal Directories



1. In the *Speed Dial* or *Personal* panel, click **Edit**. The *Edit Speed Dials/Edit Personal Contacts* dialog box appears.
2. To add an entry, click **Add**. A new row appears.
 - a. For a *Speed Dial* entry, select the dial code and enter the number and description of the contact.
 - b. For a *Personal* entry, enter the name and number.
3. To delete an entry, select the entry and then click **Delete**.
4. To modify a *Speed Dial* entry, double-click the entry to make it editable and then modify it as necessary.

Note: You cannot modify a *Personal* entry.

Receptionist Console QRG

Search Contacts

1. Select the directory to search or click the *Search* tab to search in all directories.
2. If searching in a specific directory, make sure that the *Quick Search* box is unchecked.
3. In the *Search* text box, enter the text to search for. You can enter partial information (at least two characters).
4. To restrict the search to contacts that start with the entered string, check the *Begins with* box.
5. If searching in a specific directory, select the column to search by from the drop-down list. You can select a specific column or all columns. In the *Search* tab all columns are searched.
6. Click the **Search** button.

Create Directory from Search Results



1. Perform a search on a single column in a specific directory.
2. When the results are displayed, click the **Pullout** button. A new tab is created that contains the results of the search.

Once closed, a search results tab cannot be reopened.

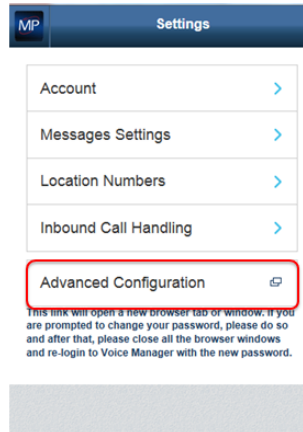
Quick Search

1. Select the directory to search and order it by the column to search.
2. Check the *Quick Search* box.
3. From the keypad that appears, select a single character. The contacts that start with the selected character (in the selected column) are displayed in the directory.

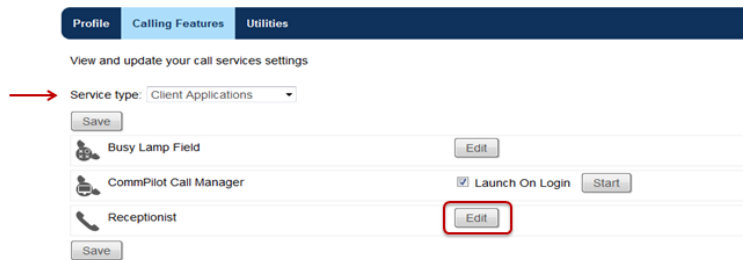
Receptionist Console QRG

Provision Monitored Users

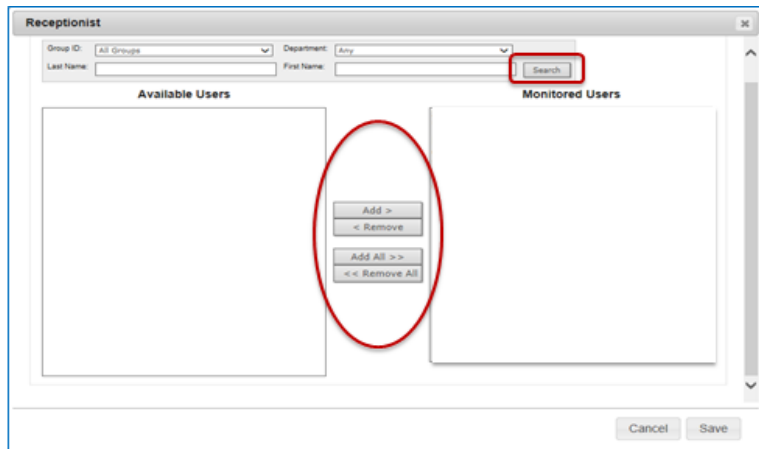
1. Log in to the Voice Manager
2. Select **Settings**
3. Select **Advanced Configuration** (a new window opens to display your Calling Features page)



1. Locate **Client Applications>Receptionist** (scroll down or use the Service type dropdown)
2. Click **Edit**




3. Add users to **Monitored Users** list
 - a) Use the search boxes to locate individual users *OR*
 - b) Click **Search** to display all users in the **Available Users** list
 - c) Add Users to the **Monitored Users** list – these will display in the Receptionist under Favorites
 - d) Click **Save**



Receptionist Console QRG

Shortcut Keys

| Key | Equivalent Mouse Action |
|--------------------|---|
| ESC | Click the Close button  in a dialog box. |
| ESC | Cancel the changes. |
| / | Click the <i>Dialer</i> text box. |
| ? | Click the <i>Search</i> text box. |
| ARROW DOWN | Click the scroll bar or the next item on a list. |
| ARROW UP | Click the scroll bar or the previous item on a list. |
| PAGE DOWN | Scroll down one page. |
| PAGE UP | Scroll up one page. |
| 1...9 | Select a call in the <i>Call Console</i> . |
| SPACEBAR | Click Answer on the selected incoming call in the <i>Call Console</i> . |
| <PERIOD> | Click End on a selected call in the <i>Call Console</i> . |
| ENTER | Click Dial. |
| ENTER | Click Search. |
| + | Click Transfer in the <i>Dialer</i> . |
| SHIFT+1..9 | Select a ringing call and click Answer. |
| SHIFT+1..9 | Select an active call and click Hold. |
| SHIFT+1..9 | Select a held call and click Retrieve. |
| S or s | Click on Settings link. |
| B or b | Click on the Back to Application link. |
| R or r | Click the Call History button. |
| H or h | Click the Help link. |
| SHIFT+L or SHIFT+I | Click the Sign Out link. |

For more information on MegaPath Receptionist, visit the Voice Learning Center www.megapath.com/VLC.