Reception Console

Quick Reference Guide

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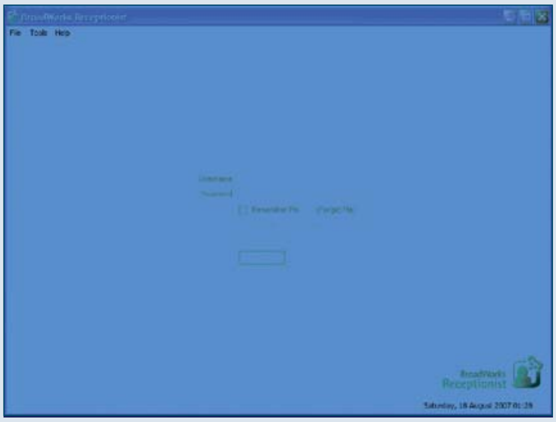
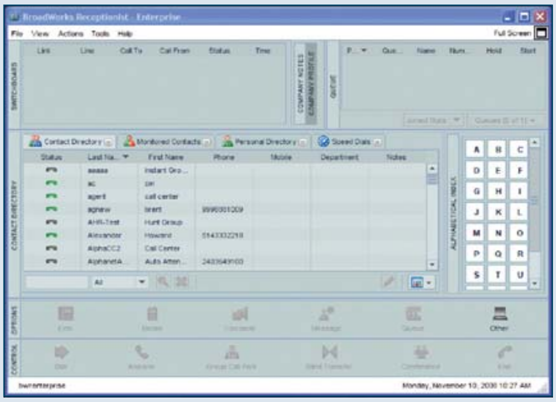
GETTING STARTED

Open the Reception Console application.

1. Enter the username and password that have been supplied.



The Main Interface



Dial Contact

1. In the Contact Directory panel, select a directory from the available directory tabs.
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.

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”.

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.

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”.

Unhold Call

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

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.

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.

   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.

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 Blind Transfer.

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

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.

Transfer to Voicemail

1. On the Switchboard, select the call to transfer.
2. In the Options panel, click Voicemail.
3. In the Control panel, click Voicemail Transfer. The calling party is transferred to your voicemail.

Transfer to Queue

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.

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".

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.

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.

   The status of both calls is "Active" and their link column changes to: 

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: 

Unhold Conference

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

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.

End Conference

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

View Company Notes

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

Keep Company Notes

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.

   The content is saved and is available between login sessions.

View Call Logs

1. In the Menu bar, select Tools and then Call History.
2. To see the dialed calls, select Dialed Calls.

   To see the received calls, select Received Calls.

   To see the missed calls, select Missed Calls.

Delete Call Logs

1. In 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.

RECEPTIONIST INTERFACE

The main elements of the Receptionist interface are as follows:

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** – IndentifiesIdentifies 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.

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.

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** – Use to send an email.
- **Queue** – Use to send a call to a queue.

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.

Company Notes

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

Queue Panel

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

Alphabetical Index

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

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.

Views

Directories can be consulted in two views as follows:

- **List view** – Provides basic information about each contact in a single column.
- **Details view** – 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.

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.

Contact Directory

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

Contact Directory – Detailed View

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

Monitored Contacts

The Monitored Contacts directory contains contacts whose phone status you are currently monitoring. It is configured on the web portal.

Speed Dials

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

LDAP Directory

The LDAP Directory is a list of contacts from your enterprise LDAP directory.

If this feature is not configured, the directory is not visible.

Outlook Directory

The Outlook Directory is a list of your Outlook contacts and their details.

If this feature is not configured, the directory is not visible.

MANAGING DIRECTORIES

Show directory tab

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

1. In 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.

Display Directory Contents

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

Search Directory

1. Select the directory where you want to conduct your search.
2. Enter a keyword (or part of a keyword) in the Search Keyword dialog box at the bottom-left of the Contact Directory panel.

3. Select a category from the Search Filter 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.

Create Custom Filter

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.

Order Directory Entries

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.

Filter Directory Alphabetically

1. Select the directory you want to filter.
2. In the Alphabetical Index panel, click the letter you want. Receptionist displays only those entries whose first alphabetical column starts with the selected letter.
3. To return to the original view, click the letter again.

Edit Contact Notes

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.

MANAGING QUEUES

View Queue Panel

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

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.

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.

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.

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.

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 diaglog 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	Check 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 Keyword box for a keyword search.
Ctrl + R	Click Reset.
Alt + O	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 arrow	Select the next category from the Search Filter.
Up/Down arrow	Go one entry up or down in the contact list.
Up/Down/Right/Left arrow	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/Exit Conference.
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.