Receptionist Console – Small Business
Receptionist Console

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 30 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)
Voice Manager with Receptionist

› If you purchased a Receptionist seat from MegaPath, you will see Receptionist listed under “Software”.

› Click the Receptionist icon to launch the application.
Receptionist Console – Sign In

Sign in to Receptionist using your Voice Manager credentials:
› **User ID & Password**
› Select **Stay signed in** if desired
› Click **Sign in**
Receptionist Console – Console Components

1. CALL CONSOLE – Shows incoming/active calls and Conference calls
2. CONTACTS – Search and Contact lists
# Receptionist Console – Contact Directories

<table>
<thead>
<tr>
<th>Directory Name</th>
<th>Contents</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Favorites</strong></td>
<td>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).</td>
<td>Monitor up to 30 contacts enterprise-wide</td>
</tr>
<tr>
<td><strong>Group/Enterprise</strong></td>
<td>All contacts in your Group or Enterprise directory. You can access your Enterprise Directory in the Customer Portal (Voice Administration).</td>
<td>Dynamically monitor up to 100 contacts in your Group/Enterprise directory.</td>
</tr>
<tr>
<td><strong>Group/Enterprise Common</strong></td>
<td>All contacts in your Group or Enterprise’s common phone list configured by your Voice Administrator in the Customer Portal (Voice Administration).</td>
<td>This directory may be empty if your Voice Administrator has not configured any contacts.</td>
</tr>
<tr>
<td><strong>Personal</strong></td>
<td>Contacts configured by you in the Customer Portal (Voice Administration).</td>
<td></td>
</tr>
<tr>
<td><strong>Speed Dial</strong></td>
<td>Consists of all speed dial codes configured for you or by you for your Speed Dial service.</td>
<td>Speed Dial 100 service needs to be assigned.</td>
</tr>
</tbody>
</table>
Receptionist – Phone Status

The **Phone Status** icon is available in some directories, in both List and Details view, and shows the contact’s phone state.

<table>
<thead>
<tr>
<th>Phone State</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Idle</td>
<td><img src="image" alt="Green Icon" /></td>
<td>This is when the contact’s phone is on-hook (available to receive a call).</td>
</tr>
<tr>
<td>Busy</td>
<td><img src="image" alt="Red Icon" /></td>
<td>This is when the contact’s phone is off-hook (on a call, busy).</td>
</tr>
<tr>
<td>Ringing</td>
<td><img src="image" alt="Yellow Icon" /></td>
<td>This is when the contact’s phone is ringing.</td>
</tr>
<tr>
<td>Do Not Disturb</td>
<td><img src="image" alt="Red Square" /></td>
<td>This is when the contact has the Do Not Disturb service turned on.</td>
</tr>
<tr>
<td>Private</td>
<td><img src="image" alt="Lock Icon" /></td>
<td><strong>NOTE:</strong> 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.</td>
</tr>
<tr>
<td>Call Forwarding Always</td>
<td><img src="image" alt="Red Arrow" /></td>
<td>This is when the contact has the Call Forwarding Always service turned on.</td>
</tr>
<tr>
<td>Unknown</td>
<td><img src="image" alt="Gray Icon" /></td>
<td>The contact is not monitored. <strong>NOTE:</strong> Virtual users cannot be monitored.</td>
</tr>
</tbody>
</table>
# Receptionist Console – Action Buttons

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dial</td>
<td>This dials the number you entered in the Dialer.</td>
</tr>
<tr>
<td>CALL</td>
<td>This places a call to the selected contact or to a number from Call History.</td>
</tr>
<tr>
<td>Redial</td>
<td>This redials the last dialed number.</td>
</tr>
<tr>
<td>EXT</td>
<td>This dials the contact’s extension.</td>
</tr>
<tr>
<td>MOB</td>
<td>This dials the contact’s mobile number.</td>
</tr>
<tr>
<td>PARK</td>
<td>This parks a call on a contact.</td>
</tr>
<tr>
<td>Transfer</td>
<td>This transfers a call to an ad hoc number entered in the Dialer.</td>
</tr>
<tr>
<td>TRF</td>
<td>This transfers a call to a selected number or contact.</td>
</tr>
<tr>
<td>VM</td>
<td>This transfers a call to the selected contact’s voice mail.</td>
</tr>
<tr>
<td>ANS</td>
<td>This answers an incoming call, answers an unanswered call for a contact, or resumes a held call.</td>
</tr>
<tr>
<td>HOLD</td>
<td>This places a call on hold.</td>
</tr>
<tr>
<td>END</td>
<td>This ends a call.</td>
</tr>
<tr>
<td>CONF</td>
<td>This establishes a conference call or adds a call to a conference.</td>
</tr>
<tr>
<td>CAMP</td>
<td>This camps the call on a busy contact.</td>
</tr>
<tr>
<td>BARGE</td>
<td>This barges in on a contact’s call.</td>
</tr>
</tbody>
</table>
## Receptionist Console - Controls

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Common Controls</strong></td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Options" /></td>
<td>This allows you to organize items in lists.</td>
</tr>
<tr>
<td><img src="image" alt="Expand/Collapse" /></td>
<td>This shows or hides the contents of a window, panel, or tab.</td>
</tr>
<tr>
<td><img src="image" alt="Close" /></td>
<td>This closes an interface element, such as window, pane, tab, or panel.</td>
</tr>
<tr>
<td><img src="image" alt="Edit" /></td>
<td>This allows you to edit contacts in some directories.</td>
</tr>
</tbody>
</table>
Receptionist – Call States

The following table lists the possible call states and actions that can be performed in each state.

<table>
<thead>
<tr>
<th>Call State</th>
<th>Display Name</th>
<th>Display Icon</th>
<th>Call Personality</th>
<th>Call Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ringing In (Local)</td>
<td>Incoming Local</td>
<td>![Icon]</td>
<td>Click-To-Dial</td>
<td>Answer, End</td>
</tr>
<tr>
<td>Ringing In (Remote)</td>
<td>Incoming</td>
<td>![Icon]</td>
<td>Terminator</td>
<td>Answer, Conference, End</td>
</tr>
<tr>
<td>Ringing Out, Outgoing</td>
<td>Outgoing</td>
<td>![Icon]</td>
<td>Orginator</td>
<td>Conference, End</td>
</tr>
<tr>
<td>Active</td>
<td>Active</td>
<td>![Icon]</td>
<td>Any</td>
<td>Transfer, Hold, End, Park, Camp, Conference</td>
</tr>
<tr>
<td>On Hold</td>
<td>Held</td>
<td>![Icon]</td>
<td>Any</td>
<td>Transfer, Resume, End, Park, Camp, Conference</td>
</tr>
<tr>
<td>On Hold (Remote)</td>
<td>Remote Held</td>
<td>![Icon]</td>
<td>Any</td>
<td>Transfer, Hold, End, Conference</td>
</tr>
<tr>
<td>Active (In Conference)</td>
<td>Active</td>
<td>![Icon]</td>
<td>Conference</td>
<td>Transfer, Hold, End</td>
</tr>
<tr>
<td>Held (In Conference)</td>
<td>Held</td>
<td>![Icon]</td>
<td>Conference</td>
<td>Resume, Transfer, End</td>
</tr>
<tr>
<td>Ringing In (Recalled Call)</td>
<td>Call Recalled</td>
<td>![Icon]</td>
<td>Terminator</td>
<td>Answer, Conference, End</td>
</tr>
<tr>
<td>Parked Call</td>
<td>Parked (&lt;DN&gt;)</td>
<td>![Icon]</td>
<td>Any</td>
<td>Answer, End</td>
</tr>
</tbody>
</table>
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.

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

› **Call Statistics** – Average hold time, transfer count.
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**. The call state changes to **Active**.

**To end a call:**
› Click **End** for that call.
Receptionist Console – Incoming Call

Incoming Call – Click **ANS** to answer or **END** to send the call to Voicemail.
Answered Incoming 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 – 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. The calls are connected and removed from the Call Console.
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**. 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** for that contact.

Alternatively, drag the call onto the target contact and click **Transfer** for that contact.
**Receptionist Console – Barge in**

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

Alternatively, drag the call onto the target contact and click **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, 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 – Add 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.
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.
To search for contacts, click **Search** on the Contacts panel to display the search panel.

› Enter search criteria in the search box, and then press enter on your keyboard or the search icon in the panel.

› To use the “Begins with” option, you will need to enter at least two characters.

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