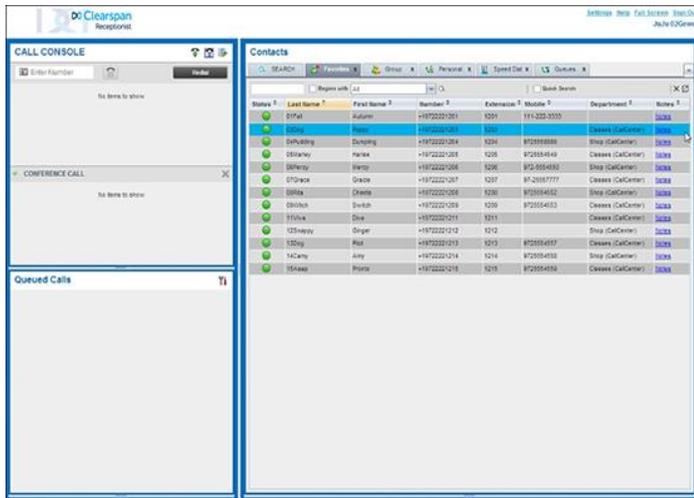


# CLEARSPAN<sup>®</sup> HOSTED THIN RECEPTIONIST



## 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 on top of the system tray when you receive a call, displaying the name and number of the caller. For calls from a call center, the call center name and diversion information (if applicable) is displayed in addition to the caller's name and phone number.



## Save vCard

When Outlook is running, you can save the caller's phone number and personal information as a vCard in Outlook.

In the *Call Notification* pop-up window that appears when you receive a call, click **Add vCard** .

## Open URL

You can open a Uniform Resource Locator (URL) page in your browser to obtain more information about the incoming call.

In the *Call Notification* pop-up window that appears when you receive a call, or in the *Call Console* on the line for the target call, click **Web Pop URL** .

## 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*.

## MANAGE CALLS

### Dial Contact

1. In the *Contacts* pane, expand the directory from which you want to dial a contact.
2. Click the contact to expand it and click **Call** for that contact.
3. To dial the contact's alternate number, if available, click the **right Call**  button and select the number from the list.

### 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.

### 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.

## Blind Transfer

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

1. In the *Call Console*, select the call to transfer.
2. To transfer the call to an ad hoc number, enter the number in the Dialer and then click Transfer.
3. To transfer the call to a contact, click a contact in one of the Contacts directories and then click TXR for that contact. Alternatively, drag the call onto the target contact and click **TRX** for that contact.
4. To transfer the call to the contact's alternate number, if available, click the right Transfer button  and select the number from the list

## 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 call and click **TXR**.

## Transfer with Consultation

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

1. Dial the number or contact to transfer the call over to.
2. When the call is answered, speak to the party.
3. In the *Call Console*, select the call to transfer.
4. Move the mouse over the new call and then click **TXR**.

## 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 voice mail, select yourself.

## Transfer to Queue

1. In the *Call Console*, select the call to transfer.
2. In the *Contacts* pane, click the Queues tab.
3. Click a queue and then click **TXR** for that queue.

## 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

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* directory 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**.

## Resume Conference

To resume the conference, in the *Conference Call* panel header, click **ANS**.

## 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.

## Barge In on Call

1. Click the target directory.
2. Click a busy contact and then click **Barge**. A Three-Way Conference is established.

## Sent E-mail to Contact

1. Click the target directory tab.
2. Click a contact with e-mail and then click **EMAIL**.
3. In the message window that appears, enter the required information and 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.

## Delete Call Logs

1. In the *Call Console*, click **Call History** . The *Call History* dialog box appears.
2. To delete all call logs, click **Delete All**.
3. To delete a specific log, click **Delete Call Log**  for that log.

## Receive Calls from Queues

To start or stop receiving calls from queues:

1. Click the **Settings** link at the top right-hand corner of the main interface and then click the *Application* tab.
2. In the *Queue Memberships* section, check the *Queue* box for each call center to join.
3. In the *Operator Policies* section, select your *Post Sign-In ACD State* from the drop-down list.

## Enable Call Waiting and Auto Answer

1. To enable Call Waiting, click **Call Waiting**  in the *Call Console*.
2. To enable Auto Answer, click **Auto Answer**  in the *Call Console*.

Note that this feature works only if your device is Advanced Call Control (ACC)-compliant. In addition, if Auto Answer is enabled on the server, you must **not** enable Auto Answer in the client.

## Start Call Recording

In the *Call Console*, select the call to record and click **Record** .

Note that the call recording functionality available in Call Center depends on your Call Recording service settings.

## Pause Call Recording

In the *Call Console*, select a call that is being recorded and then click **Pause** .

## Resume Call Recording

In the *Call Console*, select a paused call and then click **Resume** .

## Stop Call Recording

In the *Call Console*, select a paused call and click **Stop** .

## View and Change Security Classification of Calls

If you have the Security Classification service, you can view the security classification of your calls and change your current security classification in the *Call Console*.

To change your security classification, select a classification level from the *Security Classification* drop-down list.

The security classification of your current calls is recalculated.

## RECEPTIONIST INTERFACE

The main elements of the Receptionist interface include:

- Call Console
- Contacts Pane
- Queued Call Pane (Enterprise Edition)
- Setting and Help Links

## 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 the 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. For a recalled call, information about the user, against whom the call had been parked, also appears.

## Contacts Pane

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

- **Favorites** – Contacts whose status you are (statically) monitoring, which are configured on the web portal
- **Group/Enterprise** – Contacts in your enterprise or group
- **Group/Enterprise Common** – Contacts in your enterprise's or group's common phone list on Clearspan
- **Personal** – Contacts in your *Personal* directory on Clearspan
- **Speed Dial** – Speed dial numbers configured for your Speed Dial 8 and/or Speed Dial 100 service
- **Queues** – Your call centers
- **Instant Message** – Your monitored IM&P contacts
- **Outlook** – Your Outlook contacts, if the Outlook feature is configured
- **Custom** – Contacts in your custom directories on the web portal

- **Managed Contacts** – Contains dynamically managed contacts.
- **LDAP search results** – 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** tab and capabilities, which you use to search for contacts.

## Queued Calls Pane

You use the *Queued Calls* pane to manage queued calls. This pane displays calls in selected call centers that you are managing. For each call, the following information is provided:

- Call Status icon, which can be:
  -  Call is waiting to be answered
  -  Message is being played to caller
  -  Call was reordered
  -  Call was bounced
- Name/number of the call center (or Dialed Number Identification Service [DNIS], if applicable)
- Total call time, including the time in the current queue (in parentheses)

Clicking a call expands the call to show additional data:

- Call priority bucket (**Premium call center**)
- Position of call in queue
- Name and number of the calling party (if available)

## Settings, Full Screen, and Help Links

- The *Settings* link, when clicked, displays the *Settings* page, allowing you to configure Receptionist.
- The *Full Screen* link, when clicked, displays the Receptionist main window in full-screen mode.
- The *Help* link, when clicked, opens the *Clearspan Hosted Thin Receptionist User Guide* in PDF format.

# MANAGE 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 displays 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 that directory's tab.

## Monitor Contacts Statically

The *Favorites* directory, configured on the web portal, displays the phone state of contacts. This is called static monitoring.

## Monitor Contacts Dynamically

In the *Group/Enterprise* directory, click the contact's status icon. The contact is monitored and added to the Monitored Contacts directory. This is referred to as dynamic monitoring.

## Contact Phone and Calendar States

The possible contact phone states are  Available,  On a Call,  Ringing,  Do Not Disturb,  Private,  Forwarding, and  Unknown. In addition, the following states show the contact's calendar presence:  In a Meeting and  Away.

**NOTE:** If a call is parked against a contact that you are monitoring, either statically or dynamically, the information about the parked call also appears.

## See Calendar for Monitored Contact

1. Click a monitored contact in the *Favorites* or *Group/Enterprise* panel. The contact's entry expands showing additional information, including a calendar with information from the contact's Exchange calendar. Red color indicates when the contact is busy.



2. Use the  and  buttons to change the date and time on the calendar.

## Make Notes about Contact

You can make notes about contacts in the *Group/Enterprise*, *Favorites*, *Custom*, or *Monitored* directories.

1. Click the target directory tab.
2. Click the **Notes** link for the contact.
3. Enter or modify information in the *Notes for <Contact Name>* dialog box.
4. To save your changes and close the dialog box, click **OK**.  
To close the dialog box without saving, click **Cancel**.

## Manage Speed Dial and Personal Directories

1. In the *Speed Dial* or *Personal* tab, click **Edit** . The *Edit Speed Dials/Edit Personal Contacts* dialog box appears.
2. To add an entry, click **Add**. A new row appears.
  - For a *Speed Dial* entry, select the dial code and enter the number and description of the contact.
  - For a *Personal* entry, enter the name and number.
3. To delete an entry, select the entry and then click **Delete**.

- To modify a *Speed Dial* entry, double-click the entry to make it editable and then modify it as necessary.

Note that you cannot modify a *Personal* entry.

## Perform Quick Search

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

## Perform Regular Search

- Select the directory to search or click the Search tab to search in all directories.
- If searching in a specific directory, make sure that the *Quick Search* box is unchecked.
- In the *Search* text box, enter the text for which you want to search. You can enter partial information (at least two characters).
- To restrict the search to contacts that start with the entered string, check the *Begins with*
- 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.
- Click the **Search** button.

## Create Directory from Search Results

- Perform a search on a single column in a specific directory.
- When the results appear, 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.

## INSTANT MESSAGING

If you have an IM&P service assigned on Clearspan, you can chat with your IM&P contacts, and monitor the state of selected contacts.

### Monitor IM&P Contacts

To monitor the IM&P state of a contact, you first need to subscribe to the contact.

- In the *Instant Message* tab, click **Edit** . The *Edit Instant Message Contacts* dialog box appears.
- Click **Add** and enter the display name and a valid IM&P ID of the contact in the new row. A subscription request is sent to the contact.

Alternatively, click the IM&P state icon of an unsubscribed contact .

## Set Your IM&P State and Message

- Click the **Presence** box at the top right-hand side of the main window and select your new state from the drop-down list.
- Click **Edit**  next to the *Presence* box and enter a message to display to other IM&P users in the dialog box that appears.

## IM&P States

The possible states are Available , Busy , Away , and Offline . In addition, the following states are displayed in some directories, for IM&P users you are not monitoring: Not Subscribed and  Pending Subscription .

## Accept IM&P Subscription Request

When you receive a request from another user, to accept the request, click **Yes** in the dialog box that appears. The contact is added to the Instant Message directory, if it is not there.

## Chat with Contact

- To chat with one of your IM&P contacts, click the **Chat** button for the contact. A chat window appears.
- Enter your message in the text box at the bottom of the window and press ENTER.

You can have more than one chat window open. You can also accept chat requests from contacts.

## Create a Multi-User Chat

- Click the **Add** button in a current chat window. A drop-down list of available contacts appears.
- Check the check box next to each contact to invite to the chat and click the **Invite** button. When a contact joins the chat, a notification appears in the log area of the chat window.
- To leave the chat, close the dialog box.

## MANAGE QUEUES

### Display Queued Calls

To monitor calls in queues, you must select the queues to display in the *Queued Calls* pane.

- In the *Queued Calls* pane, click **Options**  and select the *Edit Queue Favorite Dialog* menu item.
- In the dialog box that appears, check the call centers to display and then click **Save**.

### Retrieve Call from Queue

- In the *Queued Calls* pane, expand a *Call Center* panel.
- Click the call and click **RETRIEVE** for that call. The call appears in the *Call Console* and you treat it as any other call.

## Transfer Call to Queue

1. In the *Queued Calls* pane, expand a *Call Center* panel and then select a queued call.
2. In the *Contacts* pane, expand the *Queues* panel.
3. Click a queue and then click **TXR** for that queue. The call is transferred to the bottom of the queue.

## Change Position of Call in Queue

1. In the *Queued Calls* pane, expand a *Call Center* panel.
2. Click the call and then click **REORDER** for that call.
3. From the drop-down list that appears, select a new position.

Note that you cannot place a call ahead of a bounced call.

## Transfer Call to Top of Queue

1. In the *Queued Calls* pane, expand a *Call Center* panel.
2. Click the target call and then click **REORDER** for that call.
3. From the drop-down list that appears, select *Send to Front*.

## Promote Call in Queue (**Premium Call Center**)

1. In the *Queued Calls* pane, expand a *Call Center* panel.
2. Click the call and then click **PROMOTE**. The call is moved to the end of the next highest priority bucket.

## Transfer Call to Contact or Ad-Hoc Number

1. In the *Queued Calls* pane, select a queued call.
2. To transfer the call to a contact, click the contact in the *Contacts* pane and then click **TXR** for that contact.
3. To transfer the call to an ad hoc number, enter the number in the *Dialer* and then click **Transfer** in the *Dialer*.

## KEYBOARD SHORTCUTS

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