

Note: This guide covers all features currently available in the Receptionist client. If a feature is disabled for you and/or your group, it will be missing or otherwise not displayed. To have a feature enabled, ask your company administrator to contact TPX.

Sign In and Out of Receptionist

If you do not know your user ID or password, contact your company administrator.

Note: When you sign in, your presence state is set to Available.

Sign In from a Web Browser

Visit <https://receptionist.dsci-net.com>, enter your user ID and password, and click **Sign In**.

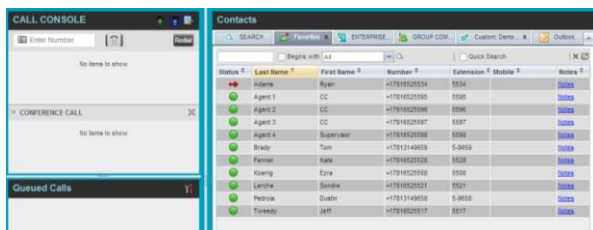
Sign In from UCx Web Portal

Log in to the UCx Web Portal at voice.dscicorp.com. From the **Launch** drop-down list in the top right-hand corner, select **Receptionist**.

Sign Out of Receptionist

Click **Sign Out** in the upper right corner. You will be prompted to save your workspace. Note: As a best practice, do not close your browser window before signing out.

Receptionist Interface



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 logs 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's tabs provide access to contact directories:

- Favorites** – Contacts whose status you are monitoring; configured in the UCx Web Portal
- Group/Enterprise** – Contacts in your enterprise or group
- Common** – Contacts in your group's common phone list; configured by your administrator
- Personal** – Contacts in your Personal phone list; configured in the UCx Web Portal
- Speed Dial** – Speed dial numbers configured for your Speed Dial 8 and/or Speed Dial 100 service
- Queues** – Allows you to transfer calls to call center queues
- Instant Message** – Displays presence status of contacts you are subscribed to; list will be empty if your status is Offline
- Outlook** – Your Outlook contacts; configured in Settings
- Custom** – Custom directories; configured by your administrator
- 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 includes a **Search** tab, which you can use to search for contacts across all directories.

Queued Calls Pane

The *Queued Calls* 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
- Total call time, including the time in the current queue (shown in parentheses)

Clicking a call expands the call to show additional data:

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

Managing Calls

Answer Call

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

Hold and Resume Call

To hold a call, move the mouse over the call in the *Call Console* and then click **HOLD** for that call. To resume the call, move the mouse over the call and then click **ANS**.

Note: This function is not available from a remote office.


End Call

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

Dial Contact

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

Dial Ad Hoc Number

In the *Dialer*, enter the number to call 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.

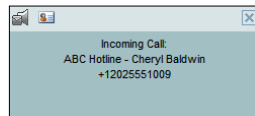
View Current Calls


Your current calls are always visible in the *Call Console*.

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

View Incoming Call Details

If the Call Notification feature is enabled, a pop-up notification window appears when you receive a call, displaying the name and number of the caller. For calls from a call center, the call center name is displayed in addition to the caller's name and phone number. You may also see these options:



- **Save vCard:** Click **Add vCard**  to save the caller's phone number and personal information as a vCard in Outlook.

- **Open URL:** Click **Web Pop URL**  to open a web page in your browser to obtain more information about the incoming call.

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 contact's directories and then click **TXR** for that contact.

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 **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 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 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, select 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 *Contacts* pane, 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*.

Note: A user with Call Waiting enabled will never appear as busy, even if their monitored state shows that they are already on another call, since Call Waiting allows multiple inbound calls.

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 a ringing contact and click **ANS**.
2. The call appears in the *Call Console*.

View and Dial from Call History

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

Clear Call History

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.

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

In the *Conference Call* panel header, click **HOLD**.

Resume 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

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

In the *Contacts* pane, click on a busy contact and then click **BARGE**. A Three-Way Conference is established.

Send E-mail to Contact

1. In the *Contacts* pane, click on a contact with e-mail, and then click **EMAIL**.
2. In the message window that appears, enter the required information and then click **Send**.

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

Click **Call Waiting**  in the *Call Console*.

Enable Auto Answer

Click **Auto Answer**  in the *Call Console*.

Note: The Auto Answer feature may be enabled manually in the client OR by your administrator on the server. If this feature is enabled by your administrator, do not use this Auto Answer button.

Call Recording

In the *Call Console*, select the call to record and click **Record**. Select a call that is being recorded for **Pause/Resume** and **Stop** functions.

Note: To record calls in Receptionist, your Call Recording service must be set to "On Demand" via the UCx Web Portal.

Managing Contacts

Manage Directories

1. At the top right of the *Contacts* pane, click the down arrow button and select the directory to show. It now appears as a tab at the top of the *Contacts* pane.
2. To remove a directory, click the **X** on its tab.

View Contact Details

Click on a contact in the *Contacts* pane.








Monitor Contacts Staticly

The *Favorites* directory, configured on the UCx Web Portal, displays the phone status of contacts. This is called static monitoring.



Monitor Contacts Dynamically

In the *Group/Enterprise* directory, click the status icon of the contact to monitor. The contact's state is updated in real time. This is referred to as dynamic monitoring.

Contact Phone/Calendar States

The possible contact states are  Available,  Ringing,  Away,  Busy (on a call or in a meeting),  Do Not Disturb,  Forwarding, and  Private.


Search Contacts

1. Click the *Search* tab in the *Contacts* pane and type your search criteria in the text box. You can enter partial information, such as part of a name or number. The search is not case-sensitive.
2. To restrict the search to contacts that start with the text to search for, check the *Begins with* box.
3. Press ENTER or click **Search** . The text is matched against all attributes and the search results are displayed in the *Search* tab.
4. To clear the search results, click **Reset** .

Make Notes about Contact

1. Click a contact to expand it.
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* panel, 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**.
 4. 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.

Instant Messaging


If you have an Instant Messaging & Presence (IM&P) service assigned, you can chat with contacts and monitor their state.

Monitor IM&P Contacts







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

subscribe to the contact. To do so, click the IM&P state icon  of an unsubscribed contact.

Set Your IM&P State and Message

1. Click the **Presence** box at the top right-hand side of the main window. Select your new state from the drop-down list.
2. 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,  Offline,  Not Subscribed, and  Pending Subscription.

Accept IM&P Subscription Request

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

Chat with Contact

Click the **Chat** button for the contact OR accept a chat request. A chat window appears. Enter your message in the text box at the bottom of the window and press **ENTER**.

Note: You can have more than one chat window open.

Create a Multi-User Chat


1. Click the **Add** button in a current chat window. A drop-down list of available contacts appears.

2. Check the 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.
3. To leave the chat, close the dialog box.

Managing Queues

Display Queued Calls

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

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

Retrieve Call from Queue

1. In the *Queued Calls* pane, expand a *Call Center* panel.
2. 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


1. In the *Queued Calls* pane, expand a *Call Center* panel.
2. Click the call to promote 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

When using keyboard shortcuts, make sure that the main interface window is in focus.

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 the 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 the Settings link.
B or b	Click 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.