

managedIP Hosted

Receptionist User Guide

Table of Contents

Receptionist Interface	2
Managing Calls	3
Managing Contacts	6
Queued Calls - Call Center Premium	8
Keyboard Shortcuts.....	9
Additional Support	9
Compatibility and Requirements.....	10

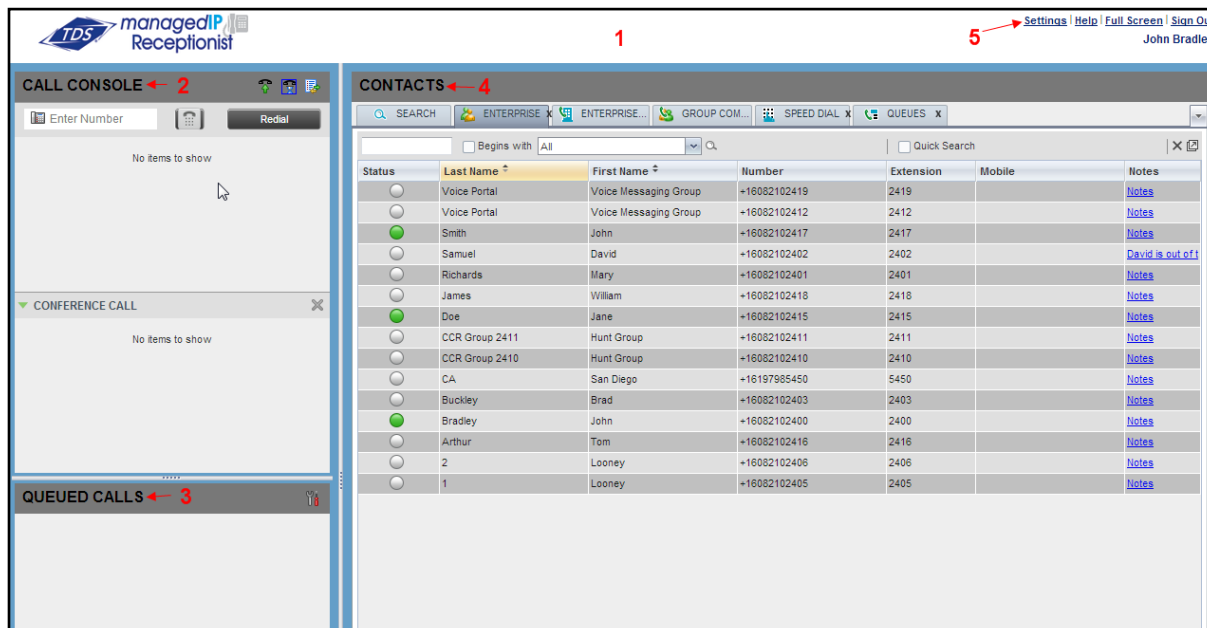


managedIP Hosted

Receptionist User Guide

RECEPTIONIST INTERFACE

The managedIP Hosted Receptionist is a full-featured Telephony Attendant designed to support the needs of front-office personnel in any environment. It supports the full set of call control options, large-scale line monitoring, queuing, multiple directory options and views, Outlook integration, and other features required in large or distributed organizations.



THE RECEPTIONIST ENTERPRISE INTERFACE INCLUDES:

1. **Logo pane** — displays links to other pages or functions of Receptionist and error, warning, and information messages. It also provides the logged-in user information.
2. **Call Console** — displays current calls to view and manage.
3. **Queued Calls pane** — displays calls in queue to view and manage.*
4. **Contacts pane** — contains your contact directories allowing you to easily make calls and monitor select contacts.
5. **Settings** — enables you to configure various aspects of the Receptionist.

**Only available to customers who subscribe to both the Receptionist Enterprise Thin client and/or Call Center Premium services. See page 8 for more information.*

managedIP Hosted

Receptionist User Guide

Call Console

The Call Console is where you manage your current calls.

IT CONTAINS THE FOLLOWING:

- **Lists of current calls** – allows you to perform actions on them.
- **Dialer** – 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 following information is displayed: name and phone number of the remote party (if available), call state, and call duration. For held calls, the time the call has been on hold is displayed. For a recalled call, information about the user, against whom the call has been parked appears.

Contacts Pane

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
- **Favorites** – Contacts whose status you are (statically) monitoring and configured on the Web portal
- **Speed Dials** – Speed dial numbers configured for 8 and/or 100 service
- **Outlook** – Outlook contacts if the feature is configured*
- **Queues** – Your call centers*

- **Custom** – Contacts in your custom directories on the Web portal*
- **LDAP search results** – Read-only access to Lightweight Directory Access Protocol (LDAP) contacts via the Search feature, if configured*

The Contacts pane also contains the **Search** feature, which you use to search for contacts and the Directories panel, which consolidates the contacts from several directories.

Settings and Help

- Click **Settings** to access a page which allows you to configure the Receptionist
- Click **Help** to open the TDS managedIP Hosted Thin Client Receptionist User Guide in PDF format

MANAGING CALLS

Dial Contact

1. In the Contacts pane, expand the target directory.
2. Click the contact and then click **CALL**.
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

1. In the Dialer , enter the number.
2. Click **Dial**.

Redial Number (up to 10 previous dialed numbers)


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

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managedIP Hosted

Receptionist User Guide

Dial from Call History

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

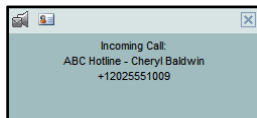
View Current Calls

Current calls are always visible. To display the details of the conference call:


1. Click the **Expand** button In the Conference panel .

View Incoming Calls Details


If the Call Notification feature is enabled, a window appears on top of the system tray when you receive a call, which displays the name and number of the caller. If the call is from a call center, the call center name is displayed as well.



Save vCard

When Outlook is running, you can save the caller's phone number and personal information as a vCard in Outlook when you receive a call by clicking **Add vCard** in the Call Notification pop-up window. 

Open URL

You can open a Uniform Resource Locator (URL) page in your browser. To obtain more information about an incoming call, click the **Web Pop URL** in the Call Notification pop-up window. It will launch a URL page in your browser. 

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

In the Call Console, move the mouse over the call and then click **ANS**. 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.

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.

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 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**.

**Only available to customers who subscribe to both the Receptionist Enterprise Thin Client and Call Center Premium services. See page 8 for more information.*



managedIP Hosted

Receptionist User Guide

Transfer with Consultation

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

1. Dial the number or contact to transfer the call 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).
3. Click **VM** for that contact.
4. Transfer the call to your own Voice Mail by selecting yourself.

Transfer to Queue

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

Camp on Busy Contact

Camp external calls trying to reach a busy extension and the call will be 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.

✓ **NOTE:** The call will be removed from the Call Console. If the call timer expires before the call is answered, the call will be recalled to your device and reappears in the Call Console.

Group Call Park

Search 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

Answer a call on behalf of another person.

1. In the Contacts pane, expand the Group/Enterprise or Favorites directory.
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

managedIP Hosted

Receptionist User Guide

Leave Conference

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

 **NOTE:** Only you are able to 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. Expand the Group/Enterprise or Favorites panel.
2. Click a busy contact and then click **BARGE**.
A Three-Way Conference is established.



Send E-mail to Contact

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

View Call History

1. In the Call Console, click **Call History**. 
The dialog box will display 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 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 Logo panel on the main interface.
2. Click the Application tab.
3. In the Queue Memberships section, check the Queue box for each call center to join.
4. 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.


 **NOTE:** The icon with the blue box around the phone indicates that Call Waiting is enabled.

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

 **NOTE:** 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.


MANAGING CONTACTS

Show Directories

1. At the top of the Contacts pane, click **Options**. 
2. Select View, then Directories, and then select or unselect the directories to display/hide. To display all directories, select All.
3. To display a directory in the Directories panel, select that directory from the drop-down list. To display all directories, select Show All.

managedIP Hosted

Receptionist User Guide

4. To display a directory below the Call Console, click the **Pullout Directory** button  for that directory in the Directories panel while the Show All option is selected.

Monitor Contacts Statically








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

Monitor Contacts Dynamically


In the Group/Enterprise directory, click the contact and then click **MON** for that contact to have the contact's state displayed. This is referred to as dynamic monitoring.


Phone States

The possible contact phone states are

	Idle		Do Not Disturb
	Busy		Private
	Ringing		Forwarding
	Unknown		

Search Contacts

1. In the Search panel, select the directories to search from the drop-down list.
2. To narrow the contact search, start with the text to search by checking the Begins with box.
3. In the Search text box, enter the text to search and press **ENTER**. You can enter partial information, such as part of a name or number. The text is matched against all attributes and the search results will be displayed in the Search panel.
4. To clear the search results, click **Reset** 

 **NOTE:** Search is not case-sensitive.

**Only available to customers who subscribe to both the Receptionist Enterprise Thin Client and/or Call Center Premium services. See page 8 for more information.*

View Contact Details


Expand the target directory panel and click a contact.


Make Notes About Contact

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

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

Manage Speed Dial/Personal Directories

1. In the Speed Dial or Personal panel, click **Edit**  and the dialog box appears.
2. To add an entry, click **Add**.
 - For a Speed Dial entry, select the dial code and enter the number and description of contact.
 - For a Personal entry, enter the name and number.
3. To delete an entry, select the entry and 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.

managedIP Hosted





Receptionist User Guide

QUEUED CALLS - CALL CENTER PREMIUM

Queued Calls is only available to customers who have both Receptionist Enterprise and Call Center Premium Services. This section covers the Queued Calls Pane and Managing Queues.

Queued Calls Pane

Use the Queued Calls pane to manage calls in queue for selected call centers. For each call, you can see the following information:


- Call Status
 -  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)

TO SHOW ADDITIONAL DATA, CLICK THE CALL

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

Display Queued Calls

1. Select the queues to display in the Queued Calls pane.
2. Click **Options**. 
3. Select the Edit Queue Favorite Dialog menu item.
4. In the dialog box, check the call centers to display and click **Save**.

 **NOTE:** To monitor call center queues, the Receptionist User must be an Assigned Supervisor of the monitored queue. These services are assigned by the Call Center/System Administrator on the Group Services Profile page.

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**.
3. Select a new position.

 **NOTE:** 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**.
3. Select **Send to Front** from the drop-down.

Promote Call in Queue (Premium Only)

1. In the Queued Calls pane, expand a Call Center panel.
2. Click the call and then click **PROMOTE**. The call will be 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 click **TXR**.
3. To transfer the call to an ad hoc number, enter the number in the Dialer and click **Transfer** in the Dialer.



managedIP Hosted

Receptionist User Guide

KEYBOARD SHORTCUTS

Key	Equivalent Mouse Action
ESC	Click the Close button  in a dialog box.
ESC	Cancel the changes.
/	Click the Dialer text box.
?	Click the Search 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 Call Console.
SPACEBAR	Click Answer on the selected incoming call in the Call Console.
<PERIOD>	Click End on a selected call in the Call Console.
ENTER	Click Dial .
ENTER	Click Search .
+	Click Transfer in the Dialer.
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.

ADDITIONAL SUPPORT

- Contact the managedIP Administrator at your company or
- Visit support.tdsmanagedip.com/hosted for additional resources



managedIP Hosted

Receptionist User Guide

HARDWARE AND SOFTWARE REQUIREMENTS

The requirements listed are the minimum requirements for proper managedIP client behavior. However, TDS strongly recommends that computer systems used to run web client have capabilities that exceed these.

Operating System

- managedIP clients are deployed on a Microsoft Windows platform, Mac OS X platform, and/or Citrix Presentation Server platform.

Client Login Restrictions

- The Receptionist and Call Center consoles are TDS applications that provide a user interface to managed and monitor users calls. TDS provides a web-based hosted client interface that runs on a web browser for these applications. Users of the Call Center and Receptionist client applications are not allowed to log in from more than one location. A location is defined as a single instance of a user agent, that is, a browser.



HARDWARE REQUIREMENTS

Microsoft Windows or Mac OS X platform:

- 1.4 gigahertz (GHz) or higher Intel Core 2 Duo processor or compatible CPU
- 2 gigabytes (GB) of RAM recommended minimum; more memory generally improves performance
- 60 megabytes (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 BroadWorks Xtended Services Platform

Citrix Presentation Server:

- 2.0 GHz or higher Pentium 4 or compatible CPU
- Minimum of 2 GB of RAM
- 60 MB free disk space per application installation
- HTTP(s) connectivity to the BroadWorks Xtended Services Platform

Citrix ICA Client Workstation:

- 1.2 GHz or higher Pentium 3 or compatible CPU
- 128 MB of RAM
- Video graphics card with 8 MB of RAM minimum
- 1024 x 768 minimum screen resolution
- Network connection of minimum 56 Kbps speed



managedIP Hosted

Receptionist User Guide

SOFTWARE REQUIREMENTS

(Note, newer versions may work.)

- Windows Vista, 7, 8, 8.1, 10, Mac OS 10.8/10.9 or Citrix XenApp 6
- Outlook through version 2013 (32-bit or 64-bit)
– Required for Outlook contact directory
- Microsoft Exchange 2007 SP3 or Microsoft Exchange 2010 SP1 – Required for Calendar Presence Integration
- Internet Explorer 10, 11, Edge, Firefox 34 & Google Chrome (43 Plugin supported, 45 plugin not supported)
- Safari 6, 7 (Mac OSX may not support some integration options: Screen pop, Notification, Call event & Program Shortcut links)
- Java Runtime: (supports 32/64-bit): Version 6 (1.6.45), Version 7 (1.0.7_71), or Version 8 (1.0.8_71)

FEATURES THAT REQUIRE JAVA PLUG-IN

- LDAP integration (Searches and displays results from a LDAP directory)
- Outlook Integration (Search and display results, caller ID and number from Outlook Contacts.)
- Call Notification Pop-up toast (Display a call notification pop-up whenever a call is received.)
- Call Statistics Archival (Store call event logs on the local computer.)
- Create desktop shortcut



NOTE: The desktop integration features for thin clients previously accessed the desktop integration through a Java applet; however these features can no longer be supported through Java plug-ins for security reasons. In the current version of the client, a local HTTPS server is downloaded in the user's machine at run time and this is used to interact with the desktop integration features, therefore a user may need to run the Java Network Launching Protocol (JNLP) frequently.

BROWSER JAVASCRIPT REQUIREMENTS

Java must be enabled on Internet Explorer for report viewing. Instructions are for IE 7-8.


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

managedIP Hosted

Receptionist User Guide

10. Click OK in the Internet options dialog security tab.

11. Close and restart Internet Explorer.

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

CITRIX SERVER IMPACTS

- The application can be published on a Citrix server via the Management Console for MetaFrame.
- Sun Microsystems Java 5 Update 11 or Java 6 Update 2 (or higher maintenance updates) Runtime editions

CITRIX WORKSTATION IMPACTS

- The Java Virtual Machine is not required on the workstation in this deployment.

RESTRICTIONS

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