

FusionWorks: Receptionist Software Client  
User Guide  
03/9/2016



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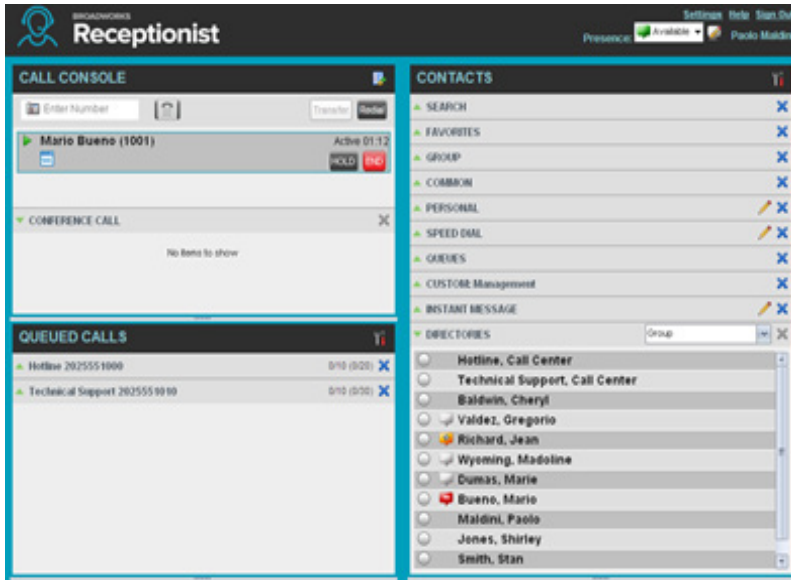
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## Receptionist Interface



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. The main area of the Call Console lists your current calls and allows you to perform actions on them. It contains the following:

- **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
- **Common** – Contacts in your group's common phone list
- **Personal** – Contacts in your *Personal* directory
- **Speed Dial** – Speed dial numbers configured for your Speed Dial 8 and/or Speed Dial 100 service
- **Instant Message** – Your monitored IM&P contacts
- **Directories** – Always visible, consolidates contacts from *Enterprise/Group, Custom, Personal, Outlook, and Speed Dial* directories.

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

The Settings link, when clicked, displays the Settings page, allowing you to configure Receptionist.

## Managing Calls

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### Dial Contact

- In the *Contacts* pane, expand the target directory.
- Click the contact and then click **CALL** for that contact.
- 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

- In the Dialer, enter the number and click **Dial**.
- Redial Number
- Up to 10 previously dialed numbers are available.
- In the Dialer, click **Redial**. A list of recently called numbers appears.
- From the list, select the number to call.

### Dial from Call History

- In the *Call Console*, click **Call History**.
- In the dialog-box that appears, select *Placed Calls, Received Calls, or Missed Calls* from the *Show* drop-down list.
- Click a call log and then click **Call** for that log.

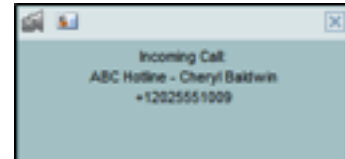
### View Current Calls

- 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 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 a current 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*.

## Blind Transfer

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

- In the *Call Console*, select the call to transfer.
- To transfer the call to an ad hoc number, enter the number in the *Dialer* and then click **Transfer**.
- To transfer the call to a contact, click a contact in one of the *Contacts* directories and then click **TXR** for that contact.

## Transfer with Consultation

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

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

## Transfer to Voice Mail

- In the *Call Console*, select the call to transfer.
- In the *Contacts* pane, click a contact with voice mail (in the *Group/Enterprise* or *Favorites* directory) and then click **VM** for that contact.
- To transfer the call to your own voice mail, select yourself.

## Supervised Transfer

To transfer an active inbound call with supervision:

- In the *Call Console*, select the call.
- Dial the number or contact to transfer the call over to.
- If the number is busy, either retry or dial another number.
- Move the mouse over the new call and click **TXR**.

## Camp on Busy Contact

You can camp external calls trying to reach a busy extension. The call is transferred when the destination becomes available.

- In the *Call Console*, select the call to camp.
- 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*.
- 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.

- In the *Contacts* pane, expand the *Group/Enterprise* or *Favorites* directory.
- Click a ringing contact and click **ANS**. The call appears in the *Call Console*.
- Start Three-Way Conference
- If necessary, place calls to participants.
- In the *Call Console*, select one of the calls to conference.
- 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

- Expand the *Group/Enterprise* or *Favorites* panel.
- Click a busy contact and then click **BARGE**. A Three-Way Conference is established.

### Sent E-mail to Contact

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



## View Call History

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

## Delete Call Logs

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

## Enable Call Waiting and Auto Answer

- To enable Call Waiting, click **Call Waiting** in the *Call Console*.
- 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.

## Record Call

- To record selected calls in Receptionist, your Call Recording service has to be set to “On Demand” via the web portal.
- In the *Call Console*, select the call to record and click **Record**.

## Managing Contacts

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



### Show Directories

- At the top of the *Contacts* pane, click **Options**.
- Select *View, Directories*, and then select/deselect directories to display/hide. To display all directories, select *All*.
- To display a directory in the *Directories* panel, select it from the drop-down list. To display all directories, select *Show All*.
- 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 state of contacts. This is called static 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.

## Search Contacts

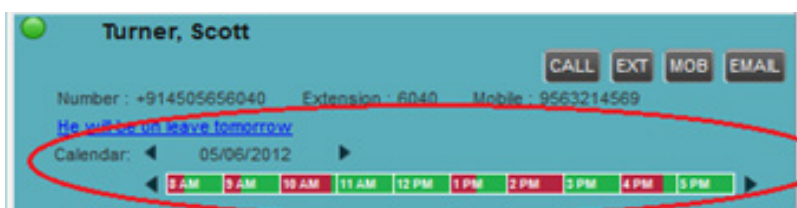
- In the Search panel, select the directories to search from the drop-down list.
- To restrict the search to contacts that start with the text to search for, check the Begins with box.
- In the Search text box, enter the text to search for and press ENTER. You can enter partial information, such as part of a name or number. The text is matched against all attributes and the search results are displayed in the Search panel.
- To clear the search results, click **Reset**.
- Note that the search is not case-sensitive.

## View Contact Details

- Expand the target directory panel and click a contact.

See Calendar for Monitored Contact

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.




Use the right and left arrow buttons to change the date and time on the calendar.

## Manage Speed Dial and Personal Directories

- In the *Speed Dial* or *Personal* panel, click **Edit**. The *Edit Speed Dials/Edit Personal Contacts* dialog box appears.
- 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.
- 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.

## Keyboard Shortcuts

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 a 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 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+l	Click the Sign Out link.