BullsEye Virtual Receptionist

User Guide

Release 17.sp2

Document Version 8

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BullsEye Virtual Receptionist User Guide

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1 About This Document

1.1 How This Guide is Organized

The following table identifies the sections to refer to for information about the functionality provided by Receptionist.

Section	Overview
Introduction to Receptionist	This section provides an overview of Receptionist and its three editions: Enterprise, Small Business, and Office.
Getting Started	This section describes how to sign in and out of Receptionist, perform the initial setup, change password, and obtain help.
Explore Workspace	This section provides an overview of the user interface.
Manage Calls	This section provides information on how to make and manage calls. This includes using your contacts to make calls or perform actions on existing calls.
Message Contacts (Enterprise Edition)	This section includes information on how to send e-mail messages to contacts.
Manage Contacts	This section provides information on managing contact directories and searching for contacts.
Monitor Contacts	This section describes static and dynamic monitoring and includes information on how to select contacts to monitor.
Manage Call History	This section provides information on managing call logs.
Manage Queued Calls (Enterprise Edition)	This section provides information on managing queued calls.
Configure Receptionist	This section describes the settings you can configure to set up and customize Receptionist for improved usability.
Appendix A: Glossary and Definitions	This appendix contains definitions of call states and phone states used in Receptionist.
Appendix B: Keyboard Shortcuts	This appendix describes keyboard shortcuts available in Receptionist.

2 Introduction to Virtual Receptionist

Virtual Receptionist delivers the following real benefits to users:

- An elegant design that is aesthetically pleasing
- An ergonomic design that follows the natural work “flow” of a call from the left to the right of the screen
- Improved business processes as only “valid” options are presented to the attendant
- Professional call handling as critical information is available in “real time”
- Accurate delivery of messages through a one-step process when people are unavailable
- Web-based interface, accessible from a web browser

2.1 Receptionist Editions

Receptionist exists in three editions: Enterprise, Small Business, and Office, each tailored to the specific needs of its target users.

The following sections provide an overview of the Receptionist Enterprise, Small Business, and Office interface and functionality and refer you to other sections of the document for more information.

> **NOTE**: Features available in a specific version are identified and tagged with the edition’s name.

2.2 Receptionist Enterprise

The Receptionist Enterprise edition is a BullsEye full-featured client, 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.

2.2.1 User Interface

Figure 1 shows the main interface of Receptionist Enterprise.

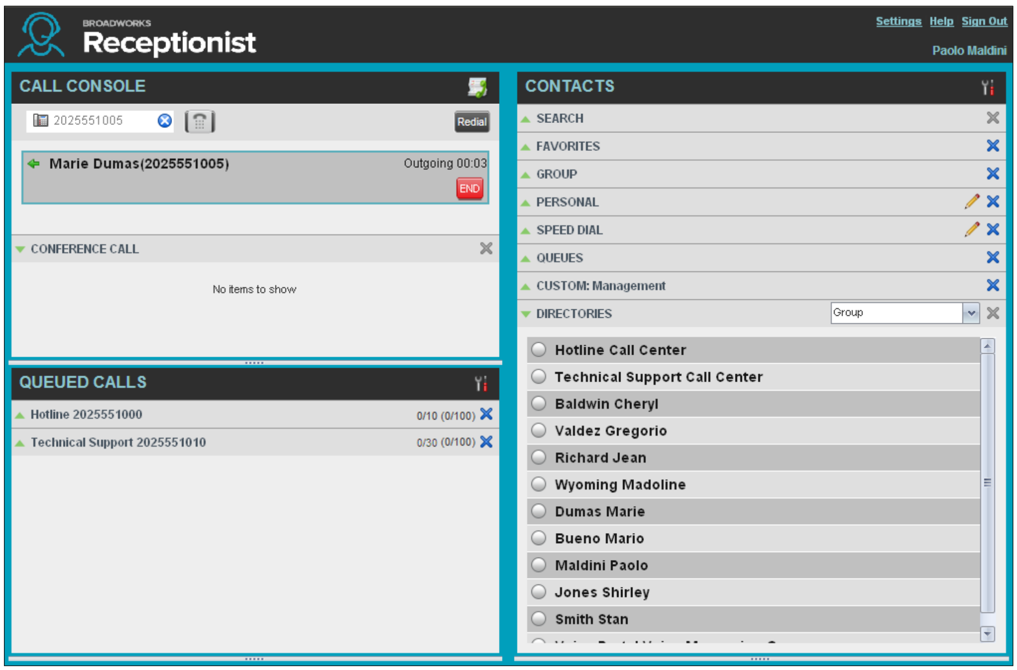


Figure 1 Receptionist Enterprise Main Interface

The interface contains the following work areas:

- **Logo pane** – The *Logo* pane displays links to other pages or functions of Receptionist and provides information about the logged user. It also displays error, warning, and information messages to the user.
- **Call Console** – This is where you view and manage your current calls.
- **Queued Calls pane** – This is where you manage queued calls. You need to have the BullsEye Supervisor service assigned to have access to this feature.
- **Contacts pane** – This pane contains your contact directories, which you use to make calls to contacts and monitor selected contacts.
- **Settings page** – You use the *Settings* page, accessed via the Settings link, to configure various aspects of Receptionist.

For more information, see section 5 *Explore Workspace*.

2.2.2 Contact Directories

This following table lists the contact directories available in Receptionist Enterprise. The *Comments* column specifies additional settings required to access the directory.

Directory Name	Contents	Comments
Favorites	This consists of the contacts whose phone status you are currently monitoring. The list of contacts to monitor must be configured for you or by you on the web portal.	Monitoring is limited to 200 static contacts enterprise-wide.
Group/Enterprise	This consists of all contacts in your BullsEye group or enterprise directory. This is the same directory that you can access through the web portal. However, if your enterprise administrator restricted your access to your enterprise directory, you can only see the contacts in your group.	You can dynamically monitor contacts in your Group/Enterprise directory. The maximum number of contacts you can dynamically monitor is configured by your administrator. The default is 100.
Personal	This consists of all contacts in your personal directory on the BullsEye web portal.	
Speed Dial	This consists of all speed dial codes configured for you or by you for your Speed Dial services.	You need to have Speed Dial 8 and/or Speed Dial 100 services assigned.
Queues	This consists of the call centers and associated DNIS numbers that you are staffing as an agent or supervising. It allows you to transfer calls into queues quickly.	You need to have Call Center service assigned.
LDAP (search only)	This consists of all users found in the configured LDAP directory. Receptionist provides you with search access to LDAP and results are displayed in the *Search* panel.	The directory needs to be configured by your system administrator. Otherwise, it is not visible. You also need to have the LDAP Integration service assigned.
Custom: <custom contact directory name>	This consists of all contacts in your custom contact directories configured by your administrator on the web portal. Each custom directory is displayed in a separate panel.	You may not have any contact directories or you may have several.
Outlook	This consists of all your Outlook contacts.	You need to have Outlook Integration service assigned.

For information on managing your contact directories, see section 8 *Manage Contacts*; for information on using your contacts to make and manage calls, see section 6 *Manage Calls*; for information on monitoring contacts, see section 9 *Monitor Contacts*.

2.2.3 Call Management Functions

The Receptionist Enterprise provides the following call management functions:

Function	Quick Reference
View Call Details	View Call Information
Dial Contact	Dial Contact
Dial Ad Hoc Number	Dial Ad Hoc Number
Redial	Redial Number
Speed Dial	Speed Dial
Dial From Call History	Dial from History
Answer Call	Answer Call
Hold Call	Put Call on Hold
Resume Held Call	Resume Held Call
End Call	End Call
Blind Call Transfer	Blind Transfer Call
Supervised Call Transfer	Conduct Supervised Transfer
Consulted Call Transfer	Transfer with Consultation
Transfer to Voice Mail	Transfer to Voice Mail
Transfer to Queue	Transfer to Queue (Enterprise Edition)
Busy Camp On	Conduct Busy Camp On (Enterprise and Small Business Editions)
Group Call Park	Conduct Group Call Park (Enterprise Edition)
Directed Call Pickup	Pick Up Call
Operator Call Barge-in	Barge in on Call
Start Conference Call	Start Three-Way Conference
Add Participant	Add Participant to Conference
Hold Conference Call	Hold Conference
Resume Conference Call	Resume Held Conference
Put Participant on Hold	Put Conference Participant on Hold
Take Participant off Hold	Resume Conference Participant
End Participant	Remove Conference Participant
Leave Conference Call	Leave Conference
End Conference Call	End Conference

For more information, see section 6 *Manage Calls*.

3.3 Receptionist Small Business

The Receptionist Small Business edition is a lower-priced version of the client, targeted at front-office personnel in small and mid-sized organizations that do not require multiple directories, call queuing, or other advanced features. It supports a full set of call control functions and monitoring of up to 30 lines in the directory.

3.3.1 User Interface

Figure 2 shows the main interface of Receptionist Small Business.

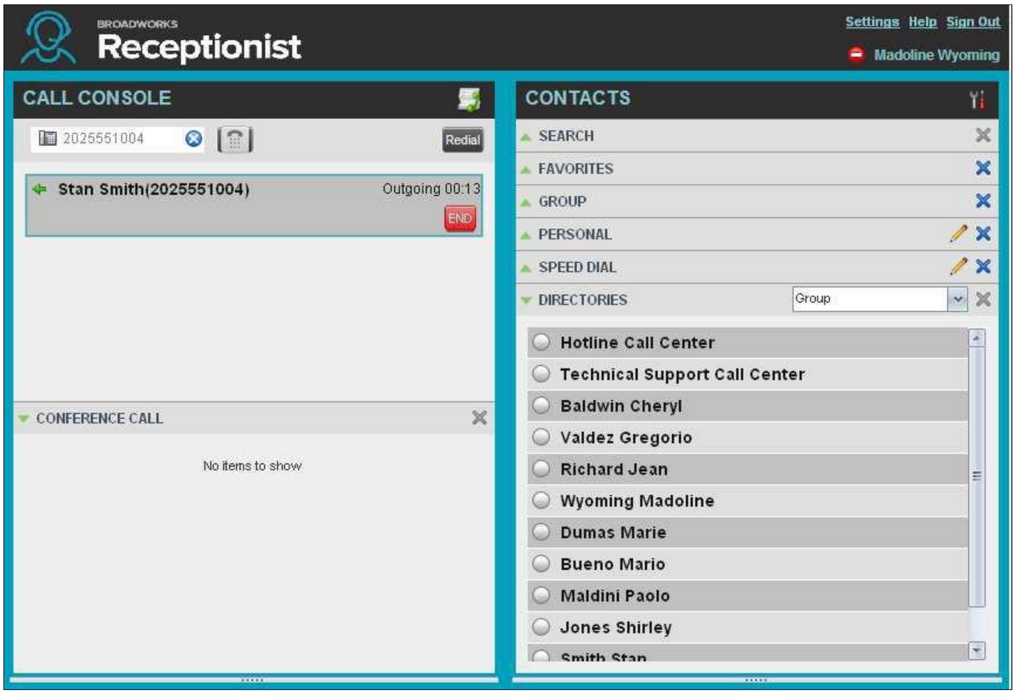


Figure 2 Receptionist Small Business Main Interface

The interface contains the following work areas:

- **Logo pane** – The *Logo* pane displays links to other pages or functions of Receptionist and provides information about the logged user. It also displays error, warning, and information messages to the user.
- **Call Console** – This is where you view and manage your current calls.
- **Contacts pane** – This pane contains your contact directories and allows you to use contacts to manage calls. You also use the *Contacts* pane to monitor contacts.
- **Settings pages** – You use the *Settings* pages, accessed via the Settings link, to configure various aspects of Receptionist.

For more information, see section 5 *Explore Workspace*.

3.3.2 Contact Directories

This following table lists the contact directories available in Receptionist Small Business. The *Comments* column specifies additional settings required to access a directory.

Directory Name	Contents	Comments
Favorites	This consists of the contacts whose phone status you are currently monitoring. The list of contacts to monitor must be configured for you or by you on the web portal.	Monitoring is limited to 30 static users company-wide.
Group/Enterprise	This consists of all contacts in your BullsEye group or enterprise directory. This is the same directory that you can access through the web portal. However, if your enterprise administrator restricted your access to your enterprise directory, you can only see the contacts in your group.	
Personal	This consists of all contacts in your personal directory on the BullsEye web portal.	
Speed Dial	This consists of all speed dial codes configured for you or by you for your Speed Dial services.	You need to have Speed Dial 8 and/or Speed Dial 100 services assigned.

For information on managing your contact directories, see section 8 *Manage Contacts*; for information on using your contacts to make and manage calls, see section 6 *Manage Calls*; for information about monitoring contacts, see section 9 *Monitor Contacts*.

3.3.3 Call Management Functionality

This section lists call management functions of Receptionist Small Business and provides you with pointers to sections of this document where they are described.

Function	Quick Reference
View Call Details	View Call Information
Dial Contact	Dial Contact
Dial Ad Hoc Number	Dial Ad Hoc Number
Redial	Redial Number
Speed Dial	Speed Dial
Dial From Call History	Dial from History
Answer Call	Answer Call
Hold Call	Put Call on Hold
Resume Held Call	Resume Held Call
End Call	End Call
Blind Call Transfer	Blind Transfer Call
Supervised Call Transfer	Conduct Supervised Transfer
Consulted Call Transfer	Transfer with Consultation
Transfer to Voice Mail	Transfer to Voice Mail
Busy Camp On	Conduct Busy Camp On (Enterprise and Small Business Editions)

Function	Quick Reference
Directed Call Pickup	Pick Up Call
Operator Call Barge-in	Barge in on Call
Start Conference Call	Start Three-Way Conference
Add Participant	Add Participant to Conference
Hold Conference Call	Hold Conference
Resume Conference Call	Resume Held Conference
Put Participant on Hold	Put Conference Participant on Hold
Take Participant off Hold	Resume Conference Participant
End Participant	Remove Conference Participant
Leave Conference Call	Leave Conference
End Conference Call	End Conference

3.4 Receptionist Office

The Receptionist Office edition is targeted at a small office environment with a limited number of employees. It supports the standard set of Call Control features and the monitoring of up to eight lines in the directory.

3.4.1 User Interface

Figure 3 shows the main interface of Receptionist Office.

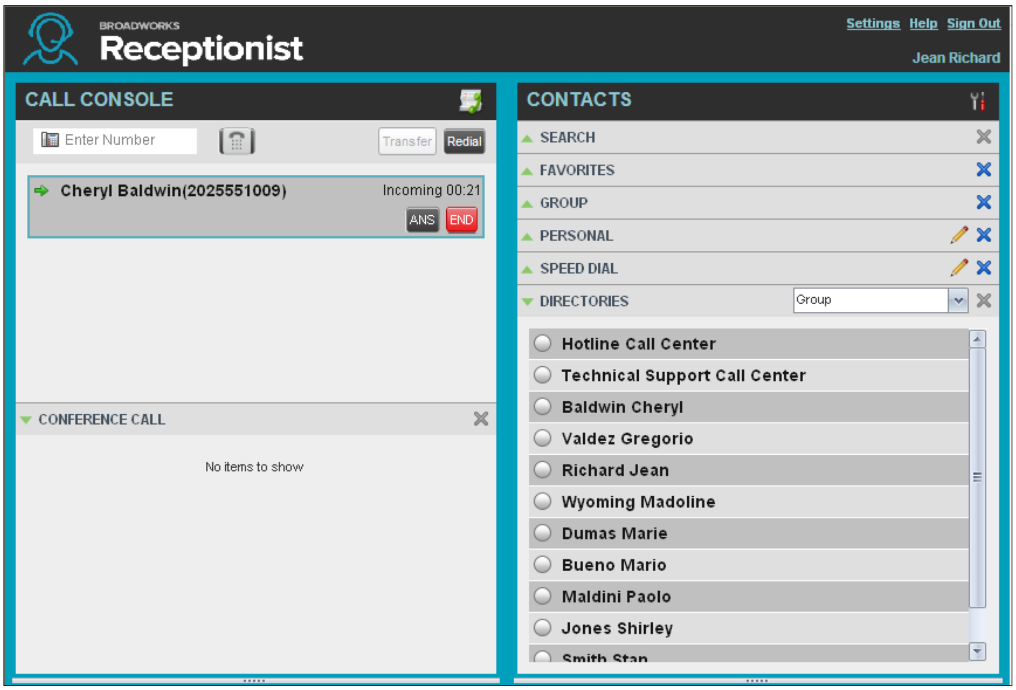


Figure 3 Receptionist Office Main Interface

The interface contains the following work areas:

- **Logo pane** – The *Logo* pane displays links to other pages or functions of Receptionist and provides information about the logged user. It also displays error, warning, and information messages to the user.
- **Call Console** – This is where you view and manage your current calls.
- **Contacts pane** – This pane contains your contact directories and allows you to use contacts to manage calls. It also allows you to monitor selected contacts.
- **Settings pages** – You use the *Settings* pages, accessed via the Settings link, to configure various aspects of Receptionist.

For more information, see section 5 *Explore Workspace*.

3.4.2 Contact Directories

This following table lists the contact directories available in Receptionist Office. The *Comments* column specifies any additional settings required to have access to a directory.

Directory Name	Contents	Comments
Favorites	This consists of the contacts whose phone status you are currently monitoring. The list of contacts to monitor must be configured for you or by you on the web portal.	Monitoring is limited to eight static users group-wide.
Group/Enterprise	This consists of all contacts in your group.	
Personal	This consists of all contacts in your personal directory on the BullsEye web portal.	
Speed Dial	This consists of all speed dial codes configured for you or by you for your Speed Dial services.	You need to have Speed Dial 8 and/or Speed Dial 100 services assigned.

For information on managing your contact directories, see section 8 *Manage Contacts*; for information on using your contacts to make and manage calls, see section 6 *Manage Calls*; for information about monitoring contacts, see section 9 *Monitor Contacts*.

3.4.3 Call Management Functionality

The Receptionist Office provides the following call management functions:

Function	Quick Reference
View Call Details	View Call Information
Dial Contact	Dial Contact
Dial Ad Hoc Number	Dial Ad Hoc Number
Redial	Redial Number
Speed Dial	Speed Dial
Dial From Call History	Dial from History
Answer Call	Answer Call
Hold Call	Put Call on Hold
Resume Held Call	Resume Held Call
End Call	End Call
Blind Call Transfer	Blind Transfer Call
Supervised Call Transfer	Conduct Supervised Transfer
Consulted Call Transfer	Transfer with Consultation
Transfer to Voice Mail	Transfer to Voice Mail
Directed Call Pickup	Pick Up Call
Operator Call Barge-in	Barge in on Call
Start Conference Call	Start Three-Way Conference
Add Participant	Add Participant to Conference
Hold Conference Call	Hold Conference

Function	Quick Reference
Resume Conference Call	Resume Held Conference
Put Participant on Hold	Put Conference Participant on Hold
Take Participant off Hold	Resume Conference Participant
End Participant	Remove Conference Participant
Leave Conference Call	Leave Conference
End Conference Call	End Conference

4 Getting Started

Receptionist is hosted on BullsEye and you access it over the network either from your web portal or from a web browser. The sign-in procedure is the same for all Receptionist editions.

NOTE 1: The minimum required screen resolution for Receptionist is 1024 x 768 pixels.

NOTE 2: Receptionist does not support signing in as different users from the same machine at the same time.

4.1 Launch Receptionist from Web Portal

BullsEye has a Single Sign-On feature. When you access the Receptionist client from the web portal, you do not need to provide your credentials since you are already logged in to the web portal.

To access Receptionist from the web portal:

1) Log in to your BullsEye webportal.
2) From the *Launch* drop-down list at the top right-hand side of the BullsEye *Logo* pane, select the link for your Receptionist service.

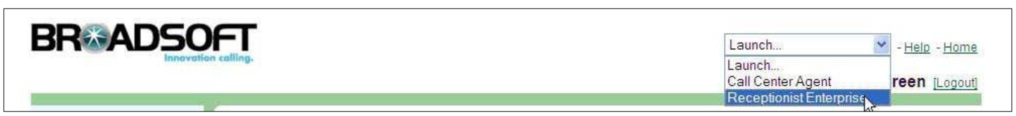


Figure 4 BullsEye Web Portal Logo Pane – Launching Receptionist

Receptionist starts and you are automatically signed in.

4.2 Sign in from Web Browser

When signing in to the client, use the same credentials you use to connect to the web portal.

To access Receptionist from a web browser:

1) In your web browser, enter the URL of the Receptionist client on BullsEye. The Receptionist *Sign-in* page appears.

Figure 5 Receptionist Sign-in Page

2) Enter your BullsEye user ID in *user@domain* format and your password.

   If you are unsure of your user ID and password, contact your company (group or enterprise) administrator.

   If you use the default domain, you can enter just the *user* part of your ID. The system then appends the default domain to it before authenticating you. If your domain is different from the default domain, you have to enter your user ID with the domain name.

   Optionally, if your system has been configured to allow it, you can configure your domain name.

3) To configure your domain or the Receptionist language, click **Show options**. The area expands displaying advanced options.

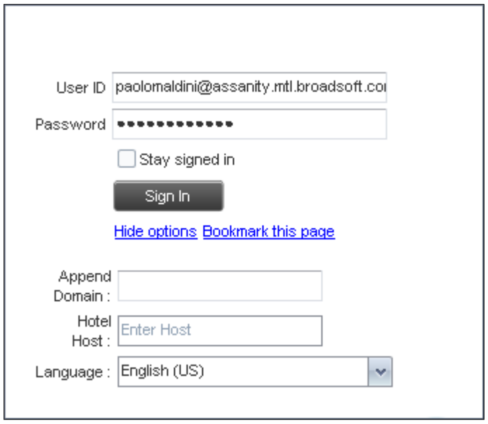


Figure 6 Receptionist Sign-in Page – Advanced Options

4) To configure your domain, in the *Append Domain* text box, enter your domain name. When you enter your user ID without a domain, the system appends the configured domain instead of the default domain.

5) To change the language, from the *Language* drop-down list, select a new language.

6) Check *Stay signed in* to instruct the client to automatically connect and sign in to the server when it detects a network connection.

   This should generally be enabled to help mitigate intermittent internet connections. When disabled, the client signs out the user when the connection is lost.

7) To add a bookmark to the *Receptionist Sign-in* page in your browser, click **Bookmark this page** and follow the instructions of your browser.

8) Click **Sign In**.

   Receptionist starts and you are signed in.

4.3 Get Help

Receptionist provides you with online access to a portable document format (PDF) version of this guide.

Figure 7 Main Interface (Top of Page) – Help Link

To access this document:

Click the **Help** link at the top right-hand side of the main interface.

4.4 Sign Out

To sign out of Receptionist:

1) Click the **Sign Out** link at the top right-hand side of the main interface.

   A message appears asking you whether you would like to save your current workspace.

Figure 8 Question Dialog Box

2) Click **Yes** to save your current workspace. This allows you to retain the same setup at your next session.

3) For information on workspace elements that can be customized, see section *12.1.5 Workspace*.

4.5 Set Up Your Environment (Enterprise Edition)

It is recommended that you configure Receptionist as follows when you first log in.

- Select call centers to manage – see section *11.1 Select Call Centers to Manage*.
- Join queues and set your post sign-in ACD state – see section *12.2 Settings – Application*.

For information about other Receptionist configuration options, see section *12 Configure Receptionist*.

4.6 Change Your Password

Remember that this is your web portal password and that you have to use this new password when accessing your web portal. The password must follow the password rules set on BullsEye.

To change your password:

1) At the top right-hand side of the main interface, click the **Settings** link. The *Settings – General* page appears.

2) In the *Account* area, click the **Change Password** link. The area expands allowing you to change your password.

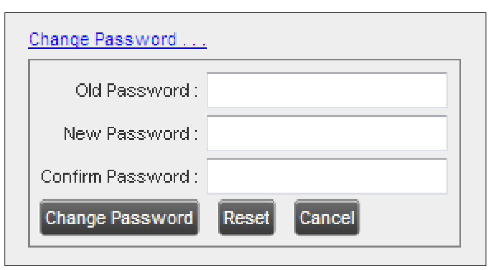


Figure 9 Account – Change Password

3) Enter your current and new password and click **Change Password**.

Note that the Reset button does not reset your password. It only clears the input boxes.

5 Explore Workspace

When you sign in to Receptionist, the main page appears where you perform most of your call management and monitoring tasks. In addition, the main page provides a link to the *Settings* pages, where you configure various Receptionist settings.

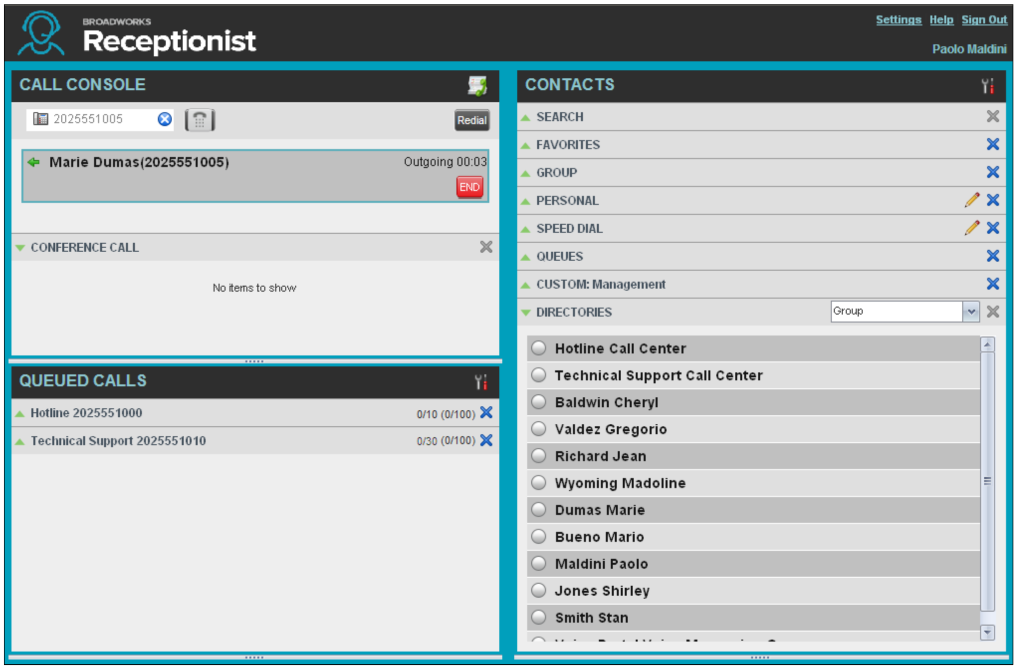


Figure 10 Receptionist Enterprise Main Interface

Many visual aspects of Receptionist are configurable. For example, you can decide which windows should be open and change the size and placement of windows on the screen. You can then save your workspace and retrieve it the next time you log in. For more information on saving your settings, see section *12.1.5 Workspace*.

NOTE 1: To work in full screen mode, make sure that the main window is in focus and then click **F11**.

NOTE 2: The Back, Forward, and Refresh operations of the web browser are not supported by Receptionist; and if performed, the results are inconsistent.

Most Receptionist controls are context-based, which means that they appear only when the action they represent can be taken. Context-based controls that allow you to take actions on calls are called action buttons. For the list of controls available in Receptionist, see section *5.5 Controls*. The action buttons are described in section *5.5.1 Call Action Buttons*.

This section describes the following elements of the Receptionist main interface:

- Logo Pane
- Call Console
- Contacts Pane

- Queued Calls Pane (Enterprise Edition)
- Controls

The *Settings* pages, accessed via the Settings link and used to configure Receptionist, are described in section *12 Configure Receptionist*.

5.1 Logo Pane

The Receptionist main page and *Settings* pages contain a *Logo* pane, which displays the Receptionist client or company logo, global messages, links to other interface elements or Receptionist functions, and information about the signed-in user.

Figure 11 Receptionist Logo Pane

5.1.1 Global Message Area

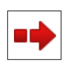
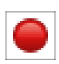
The *Global Message Area,* that is, the center area of the *Logo* pane, is used by Receptionist to display information, warning, and error messages to the user. A message is displayed for several seconds and then disappears.

5.1.2 Settings, Help, and Sign Out Links

The *Logo* pane displays links to the *Settings* pages, where you can configure the client, and the Help and Sign Out links.

5.1.3 Signed-in User Information

Information about yourself (that is, your name, your phone number, your availability to take calls, and your voice mail status) is displayed at the top right-hand side of the main interface. Information about the following services and features is provided:

- Do Not Disturb (DND) 
- Call Forwarding Always (CFA) 
- Busy Call State 
- Voice Messaging 

The information is presented in the form of icons to the left of your name in the following format:

<DND/CFA/Busy> <Voice Messaging>

The <DND/CFA/Busy> state is represented by one icon, where Do Not Disturb has precedence over Call Forwarding Always, which has precedence over *your Busy* Call State. If none of the services is enabled and your call state is *Idle*, the icon is not displayed.

The Voice Messaging icon is present only if you have outstanding voice messages.

In addition, if a call is parked against your extension, the following information appears:

Parked User: <First Name> <Last Name> (<Extension>).

5.2 Call Console

You use the *Call Console* to view and manage your current calls. For information on managing your calls, see section 6 *Manage Calls*.

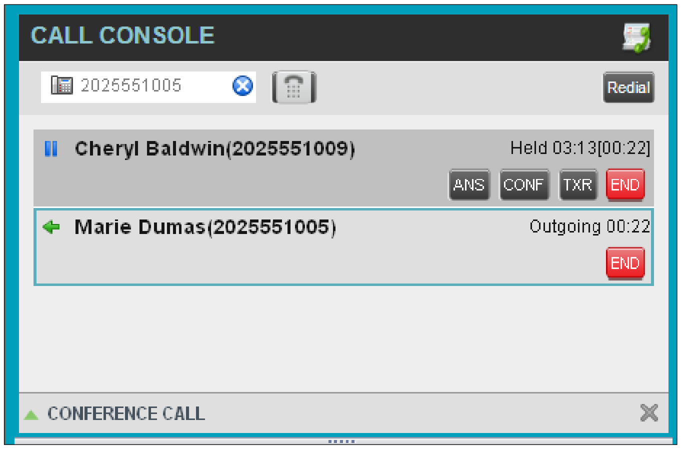


Figure 12 Call Console

The *Call Console* contains the following areas:

- Header
- Dialer
- Current Calls
- Conference Call Panel

5.2.1 Header

The Call Console header contains the following controls:

- Call History button  – This allows you to access the list of your previous calls.
- Call Waiting button  – This allows you to enable the Call Waiting service.
- Auto Answer button  – This allows you to answer your calls automatically.

5.2.2 Dialer

The *Dialer*, located at the top of the *Call Console*, below the header, allows you to make ad hoc calls.

Figure 13 Call Console – Dialer

- The *Enter Number* text box is where you enter the number to dial.
- The buttons to the right, called action buttons, change depending on the context, and allow you to perform operations on calls. For more information, see sections *5.2.5 Call States and Actions* and *5.5.1 Call Action Buttons.*

5.2.3 Current Calls

The *Call Console* displays your current calls and allows you to take actions on them.

If you are involved in a conference call, its details are displayed in the *Conference Call* panel at the bottom of the *Call Console*. The *Conference Call* panel is described in the following section.

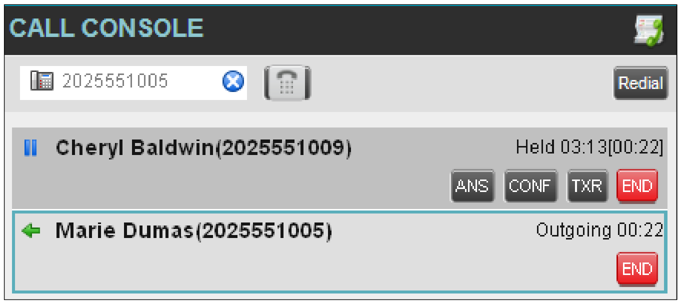


Figure 14 Call Console – Current Calls

Each call is listed on a separate line with the following information:

- Remote CLID – This is the name of the remote party (if available) and the phone number in parenthesis.

  For a recalled call, the following information appears: Recall: <Caller’s name>; via: <Call parked against user>.

- Call State icon – This is a visual representation of the current state of the call. For more information, see section *5.2.5 Call States and Actions*.
- Call State name – This is the display name of the state the call is currently in.
- Call duration [Held duration] – This is the duration of the call from the time the call was received from BullsEye and it accurately reflects how long the call has been present in the system. In addition, for held calls, the time a call has been on hold is also displayed.
- Action buttons – These buttons are for the operations that you can currently take on the call. For more information, see sections *5.2.5 Call States and Actions* and *5.5.1 Call Action Buttons.*

5.2.4 Conference Call Panel

The *Conference Call* panel displays your current conference and allows you to manage your conference calls. You can only be involved in one conference call at a time.

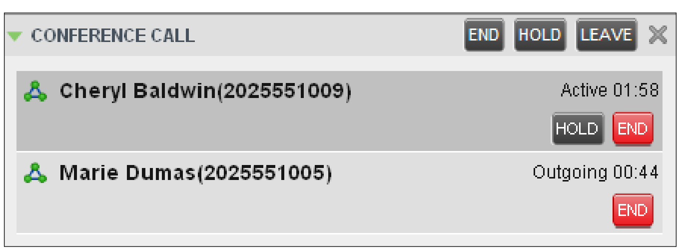


Figure 15 Conference Call Panel

The header bar contains various controls that allow you to manage the conference:

- Hold Conference button HOLD – This allows you to place the conference on hold.
- Resume Conference button ANS – This allows you to resume a held conference.
- Leave Conference button LEAVE – This allows you to leave the conference.
- End Conference button END – This allows you to end the conference.

The panel lists the call legs that make up your current conference. Each two-way call is displayed on a separate line. The information displayed for each call leg is the same as the information displayed for a two-way call. For information, see section *5.2.3 Current Calls*.

5.2.5 Call States and Actions

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

Call State	Display Name	Display Icon	Call Personality	Call Actions
Ringing In (Local)	Incoming Local		Click-To-Dial	Answer, End
Ringing In (Remote)	Incoming		Terminator	Answer, Conference, End
Ringing Out, Outgoing	Outgoing		Originator	Conference, End
Active	Active		Any	Transfer, Hold, End, Park, Camp, Conference
On Hold	Held		Any	Transfer, Resume, End, Park, Camp, Conference
On Hold (Remote)	Remote Held		Any	Transfer, Hold, End, Conference
Active (In Conference)	Active		Conference	Transfer, Hold, End
Held (In Conference)	Held		Conference	Resume, Transfer, End
Ringing In (Recalled Call)	Call Recalled		Terminator	Answer, Conference, End
Parked Call	Parked (<DN>)		Any	Answer, End

5.3 Contacts Pane

The *Contacts* pane contains your contact directories and allows you to use your contacts to make or manage calls. For information on using contacts to manage calls, see section 6 *Manage Calls*. For information about organizing and managing your contact directories, see section 8 *Manage Contacts*.

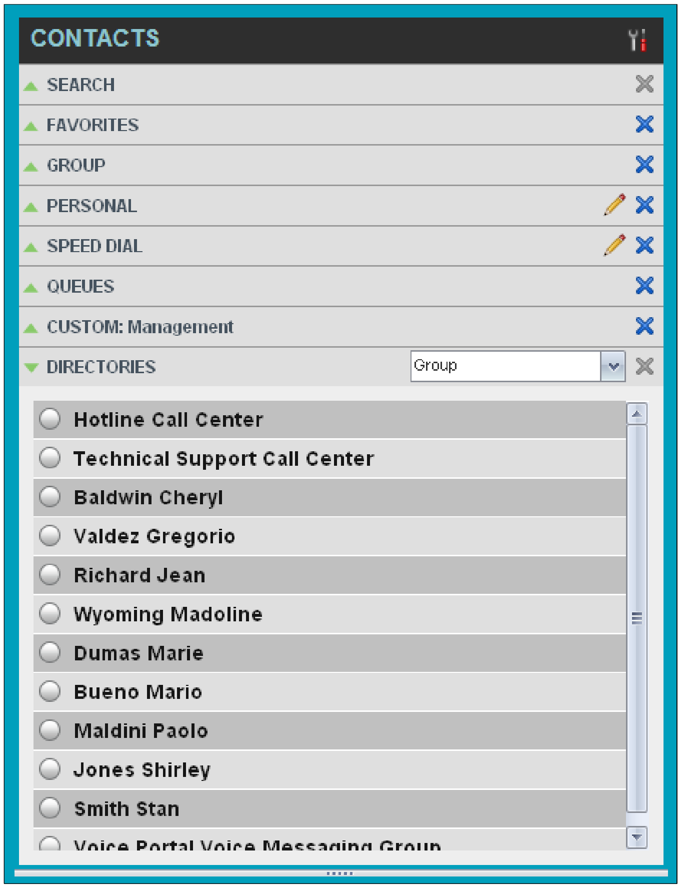


Figure 16 Receptionist Enterprise Contacts Pane

The *Contacts* pane contains the following panels:

- Search Panel
- Favorites Panel
- Enterprise/Group Panel
- Custom Directories Panels (Enterprise Edition)
- Personal Panel
- Speed Dial Panel
- Queues Panel (Enterprise Edition)
- Outlook Panel (Enterprise Edition)
- Directories Panel

The panels you see depend on your Receptionist edition, system configuration, as well as the services assigned to you. For information, see section 3 *Introduction to Receptionist* or see your administrator.

When you click a contact in any contact directory, the contact expands and information about the contact appears as well as the action buttons for the operations that you can currently perform on that contact.

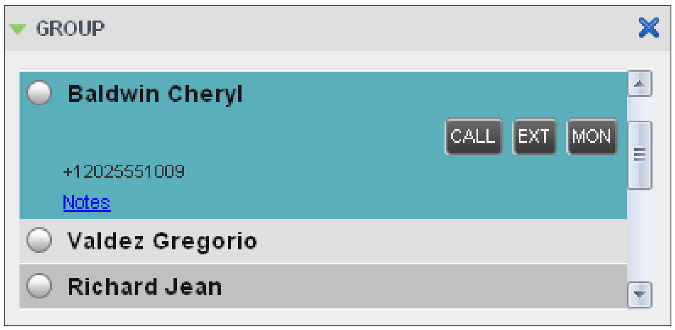


Figure 17 Group Panel – Contact in Focus with Action Buttons

For the list of action buttons available in Receptionist, see section *5.5.1 Call Action Buttons*.

5.3.1 Search Panel

You use the *Search* panel to look for specific contacts in your contacts directories and, if available, in the configured *LDAP* directory. For information on performing directory searches, see section *8.3 Search Contacts*.

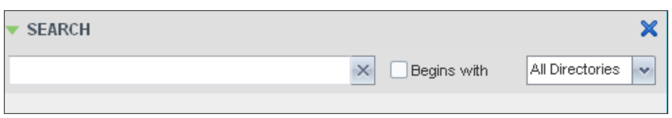


Figure 18 Contacts Pane – Search Panel

5.3.2 Favorites Panel

You use the *Favorites* panel to monitor the call status of selected contacts. The contacts to monitor must be configured on the web portal. This is referred to as static monitoring. For more information, see section 9 *Monitor Contacts*.

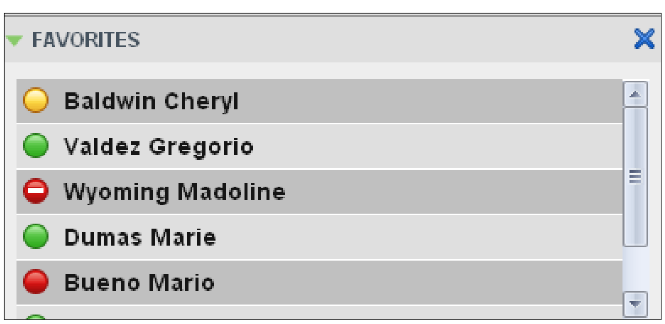


Figure 19 Contacts Pane – Favorites Panel

5.3.3 Enterprise/Group Panel

The *Group/Enterprise* panel contains the contacts in your BullsEye group directory (if your group is part of a service provider) or enterprise directory (if your group is part of an enterprise). However, if your enterprise administrator restricted your access to your enterprise directory, you can only see the contacts from your group directory.

If you have the Receptionist Enterprise edition, you can also monitor selected contacts and view contact details. This is referred to as dynamic monitoring. For information, see section *9.3 Dynamic Monitoring (Enterprise Edition)*.

Figure 20 Contacts Pane – Group Panel

5.3.4 Custom Directories Panels (Enterprise Edition)

If your administrator has configured custom contact directories for your group, you can access them from Receptionist.

> **NOTE**: A custom directory has the same properties as the *Group/Enterprise* directory, and you can perform the same operations on contacts in a custom directory as in the *Group/Enterprise* directory.

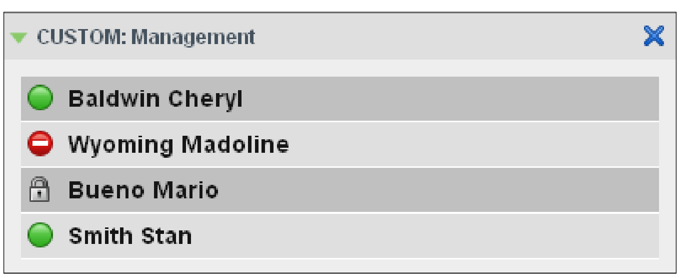


Figure 21 Contacts Pane – Custom (Directory) Panel

5.3.5 Personal Panel

The *Personal* panel contains the contacts from your personal phone list on the BullsEye web portal.

You can edit your personal contacts in Receptionist. For information about managing your personal contacts, see section *8.6 Manage Personal Contacts*

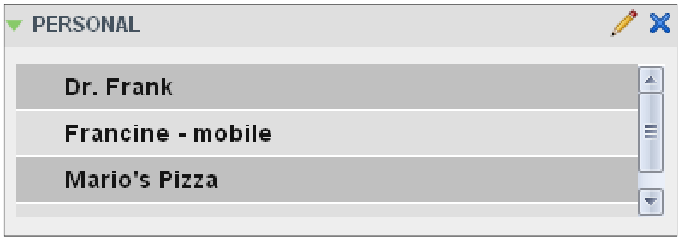


Figure 22 Contacts Pane – Personal Panel

5.3.6 Speed Dial Panel

The *Speed Dial* panel displays your Speed Dial 8 and Speed Dial 100 contacts. It is available to users who have been assigned Speed Dial 8 and/or Speed Dial 100 services. If you only have one of these services, you only see the contacts for that service in your Speed Dial directory.

You can edit your speed dial entries in Receptionist. For information about managing your speed dial entries, see section *8.7 Manage Speed Dial Entries*.

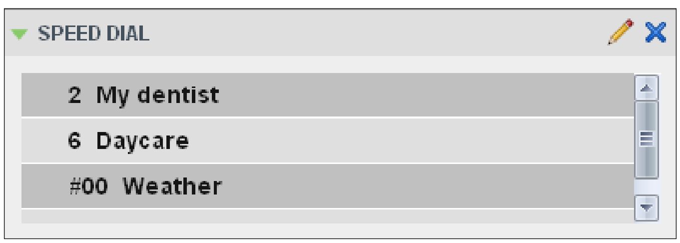


Figure 23 Contacts Pane – Speed Dial Panel

5.3.7 Queues Panel (Enterprise Edition)

The *Queues* panel displays the list of call centers and associated DNIS numbers that a call center agent or supervisor is staffing and/or supervising. The primary purpose of this directory is to provide you with a quick way to transfer calls to queues.

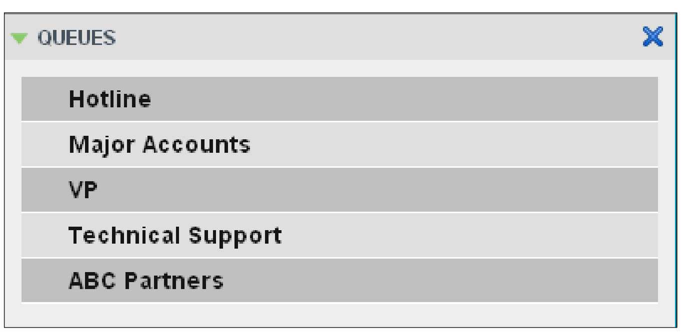


Figure 24 Contacts Pane – Queues Panel

5.3.8 Outlook Panel (Enterprise Edition)

The *Outlook* panel contains your Outlook contacts. This feature is available to you if you have the Outlook Integration service enabled and configured. For more information, see section *12.4 Settings – Plug-ins*.

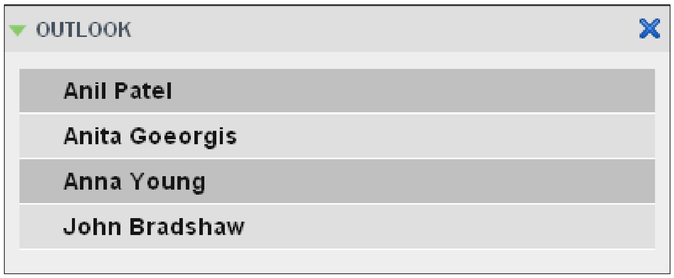


Figure 25 Contacts Pane – Outlook Panel

5.3.9 Directories Panel

The *Directories* panel consolidates the contacts from the following directories: *Enterprise/Group* directory, *Custom* directories, *Personal* directory, *Outlook* directory, and *Speed Dial* directory. The *Directories* panel is always visible. You can choose which directories to view in the *Directories* panel and you can collapse the panel, but you cannot close it.

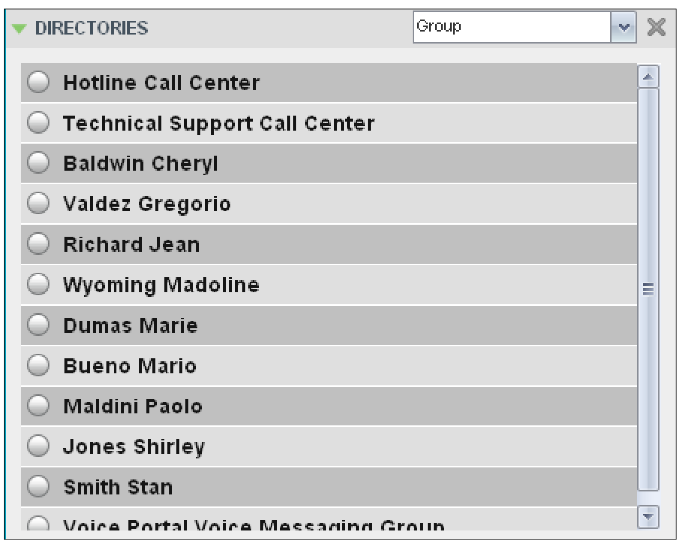


Figure 26 Contacts Pane – Directories Panel

You can also place a copy of a directory below the *Call Console*. This allows you to view more than one directory at a time easily. For more information, see section 8 *Manage Contacts*.

5.4 Queued Calls Pane (Enterprise Edition)

You use the *Queued Calls* pane to manage queued calls in the selected call centers. For more information about managing queued calls, see section *11 Manage Queued Calls (Enterprise Edition)*.

Figure 27 Queued Calls Pane

The pane lists queued calls for the selected call centers. For information on selecting call centers to display, see section *11.1 Select Call Centers to Manage*.

Each call center is displayed in a separate panel. The panel's header displays the following information:

- The name of the callcenter.
- The primary phone number of the call center.
- The number of calls currently displayed for the queue against the maximum number of calls that can be displayed for a queue.
- The number of calls in queue against the queue length.

A *Message Waiting* icon  indicates that there are outstanding messages for the call center.

When you expand the panel for a call center, the list of calls queued in that call center appears, with calls listed according to their position in the queue.

Figure 28 Queued Calls Pane – Call Center Panel (Expanded)

The following information is provided for each call:

- Call Status icon – A graphic representation of the state of the queued call, which can be one of thefollowing:

- *Waiting*  – The call is queued, waiting to be answered.
- *Announcement*  – An announcement is being played to the caller.
- *Reordered*  – The position of the call in the queue has been changed.
- *Bounced*  –The call has been bounced.

■ Name (if available) and phone number of the calling party

■ The total call time, including the time in the current priority bucket (in parentheses)

Clicking a call expands the call to show additional data:

■ Position of the call in the queue

■ Priority of the call (Premium Call Center)

■ Name (if available) and the phone number of the call center (or DNIS, if applicable) that was called

When you move the mouse over a queued call, the action buttons that can be applied to the call appear. For information, see section *5.5.1 Call Action Buttons*.

5.5 Controls

Receptionist controls are designed in a contextual manner, that is, most controls appear only when the action they represent can be taken. For example, when you select a call and enter a number or select a contact, the Transfer button appears, allowing you to transfer the call. The controls that correspond to call operations, such as Dial, Transfer, or Hold are called action buttons. They are described in section *5.5.1 Call Action Buttons*.

The following table lists the general controls used in Receptionist and the controls displayed on the headers in the panels.

Name	Description
Common Controls	
Options	This allows you to organize items in lists.
Expand/Collapse	This shows or hides the contents of a window or panel.
Close	This closes an interface element, such as window, pane, or panel.
Edit	This allows you to edit contacts in some directories.
Call Console Controls	
 Call History	This displays your call logs.

Name	Description
Call Waiting	This allows you to turn Call Waiting on or off.
Auto Answer	This automatically answers your incoming calls.
End Conference	This ends a conference call.
Leave Conference	This allows you to leave the conference while allowing other participants to continue the call.
Hold Conference	This places a conference call on hold.
Resume Conference	This resumes a held conference.
Pull Out Directory	This places a selected directory below the Call Console.
Dialog Box – Notification Window	
Web Pop URL	This opens a page in your browser at the configured URL to provide additional information about the caller.
vCard	This saves the caller’s phone number and personal information as a vCard in Microsoft Outlook.
Transfer to Voice Mail	This transfers an incoming call to your voice mail.

5.5.1 Call Action Buttons

Action buttons allow you to perform actions on calls, such as answering or transferring a call, or actions that result in a call being placed, such as dialing a number or contact. They appear on the Dialer, a call line, a call history log, or a directory entry.

Action buttons are contextual, that is, they appear on a line/entry only when you move the mouse over that entry and when the corresponding action can be performed on that entry.

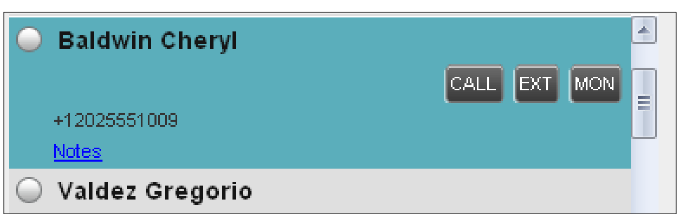


Figure 29 Group Panel – Contact in Focus with Action Buttons

The following table lists action buttons available in Receptionist.

Button	Description
Dial	This dials the number you entered in the *Dialer*.

Button	Description
CALL	This places a call to the selected contact or to a number from Call History.
Redial Redial	This redials the last dialed number.
EXT Extension	This dials the contact’s extension.
MOB Mobile	This dials the contact’s mobile number.
EMAIL E-mail	This brings up a new e-mail message window with the contact’s e-mail address, allowing you to send an e-mail to the contact.
Transfer Transfer	This transfers a call to an ad hoc number entered in the Dialer.
TXR Transfer	This transfers a call to a selected number or contact.
VM Transfer to Voice Mail	This transfers a call to the selected contact’s voice mail.
ANS Answer	This answers an incoming call, answers an unanswered call for a contact, or resumes a held call.
HOLD Hold	This places a call on hold.
END End	This ends a call.
CONF Conference	This establishes a conference call or adds a call to a conference.
CAMP Camp	This camps the call on a busy contact.
BARGE Barge In	This barges in on a contact’s call.
PARK Park	This parks a call on a contact.
MON Monitor	This starts monitoring the state of the selected contact.
PROMOTE Promote	This promotes a selected call to the next higher priority bucket.
RETRIEVE Retrieve	This retrieves a selected call from the queue to the supervisor’s device.
REORDER Reorder	This changes a selected call’s position in the queue.
Delete Call Log	This deletes a call log from Call History.

6 Manage Calls

This section includes information and procedures on how to manage current calls. You use the *Call Console* to view and manage your current calls.

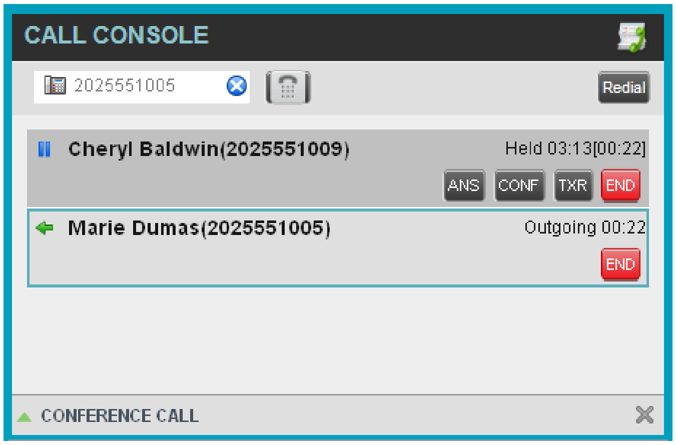


Figure 30 Call Console

6.1 Drag and Drop Call onto Contact

For operations on calls that involve a contact, you can drag a call from the *Call Console* and drop it on a target contact in one of your contact's directories. This provides you with a quick way to perform operations on calls that involve a contact.

As the call is dragged, a green arrow appears. When the call is dropped onto a contact, no action is taken on the call. The target contact expands and you can select the action button for the operation you want to perform on that call.

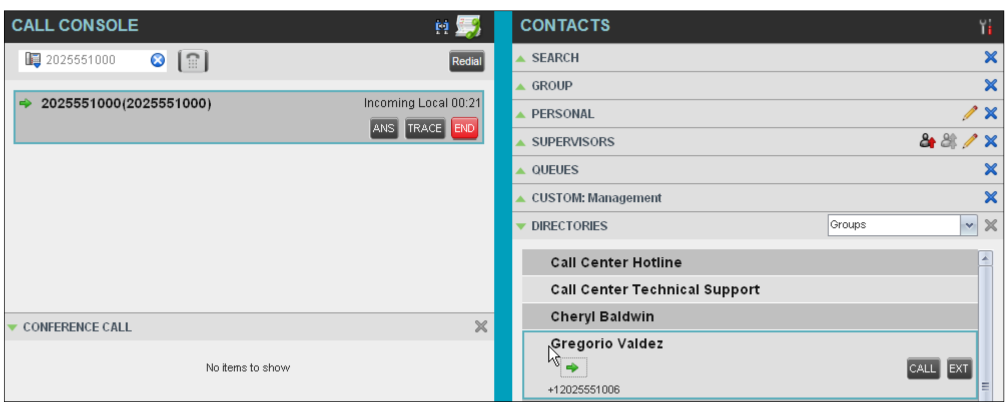


Figure 31 Dragging Call and Dropping it on Contact

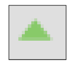
6.2 View Call Information

Call information is provided in the *Call Console* and in the *Call Notification* pop-up window that appears on top of the system tray for incoming calls.

6.2.1 View Current Calls

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

To view your conference call:

In the *Conference Call* panel, click the **Expand** button .

6.2.2 View Incoming Call Details

If the Call Notification feature is enabled, a *Call Notification* pop-up window appears on top of the system tray when an inbound call is received.

- *Direct inbound calls* – For calls to your direct number or extension, the following information is displayed:
  - Calling party name
  - Calling party number

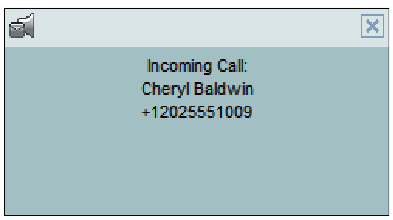


Figure 32 Call Notification Pop-up Window for Non-ACD Call

- *Calls from a call center* (Enterprise Edition) – For calls from a call center, the call center name is displayed in addition to the caller's name and phone number.

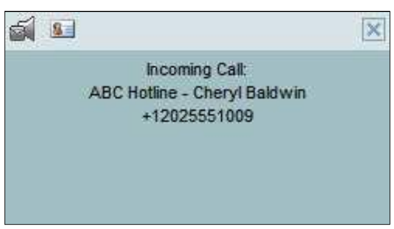


Figure 33 Call Notification Pop-up Window − Call from Call Center

NOTE 1: You must have only one tab open in the browser running Receptionist to receive call notifications.

NOTE 2: If calls come within eight seconds of each other, the *Call Notification* pop-up window only appears for the first call of that series.

6.2.3 Save vCard

When you receive a call, a *Call Notification* pop-up window is visible on top of the system tray. From this window, you can save the caller's phone number and personal information as a vCard in Microsoft Outlook.

To save caller's information as a vCard:

In the *Call Notification* pop-up window, click the **Add vCard** button .

This button is present only when Outlook is running.

6.2.4 Open URL

When you receive a call, a *Call Notification* pop-up window appears on top of the system tray. From this window, you can open a page in your browser. This page contains information about the calling party encoded in its URL.

To configure this feature, see section *12.1 Settings – General*.

To open a URL in your browser:

In the *Call Notification* pop-up window, click the **Web Pop URL** button .

6.3 Answering Calls

You can answer your own incoming calls and calls for other users in your group. If you have the Auto Answer service, you can also answer calls automatically.

6.3.1 Answer Call

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*.

NOTE: Double-clicking a call, does not answer it.

To answer an incoming call from a Call Notification pop-up window:
Click anywhere on the text in the window.

To answer calls automatically:

In the *Call Console*, click the **Auto Answer**  button. The button changes to this  to indicate that Auto Answer is on.

When Auto Answer is enabled, your phone automatically goes off-hook when it is alerted. This applies to both inbound and Click-To-Dial calls.

The Auto Answer feature may be enabled manually in the client or by the administrator on the server.

> **NOTE**: If this feature is enabled by your administrator, you must **not** enable the client-based Auto Answer using the Auto Answer button.

6.3.2 Pick Up Call

The Directed Call Pickup service allows you to answer a call that is incoming on another user. Depending on your setup, you can answer calls for users in your group or in the entire enterprise. This is useful when the user is currently not on hand to answer the call.

> **NOTE**: To pick up a contact's call, you need to have the Directed Call Pickup service assigned.

To answer a call for a contact:

1) Expand your *Group/Enterprise* or *Favorites* directory and click the target contact to expand it. The contact's state must be *Ringing*.
2) Move the mouse over the contact and click **Answer** 

.

   The call appears as *Incoming* in the *Call Console*.

6.4 Hold and Resume Calls

You can only put an active call on hold.

6.4.1 Put Call on Hold

To put a call on hold:

Move the mouse over the call and click **Hold** 

.

6.4.2 Resume Held Call

To resume a held call:

Move the mouse over the call and click **Answer** 

.

> **NOTE**: Double-clicking a call does not take the call off hold.

6.5 Make and End Calls

Receptionist provides you with several ways in which you can make calls. When you dial a number or contact, the call appears in the *Call Console* as *Incoming Local.*

6.5.1 Dial Ad Hoc Number

You use the *Dialer* to place a call to an ad hoc number.

Figure 34 Dialer

To dial an ad hoc number:

1) In the *Dialer*, enter the phone number and click **Dial** . The call appears in the *Call Console* as *Incoming Local* and your phone rings.

2) Click **Answer**  for that call. An outbound call is placed and the call state changes to *Outgoing*.

6.5.2 Redial Number

Receptionist keeps up to ten most recently dialed numbers.

To redial one of the recently dialed numbers:

1) In the *Dialer*, place the cursor in the text box and start entering a number. A list of recently called numbers that start with the entered digits appears.

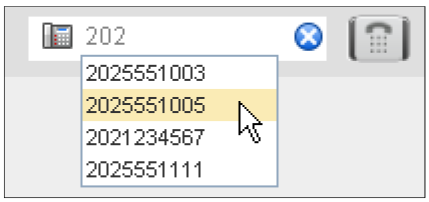


Figure 35 Dialer – Select Recently Dialed Number

2) Select the number to dial and click **Dial** .

The client issues a Click-To-Dial attempt to the selected number.

Alternatively, click the **Redial**  button and select the number from the list that appears.

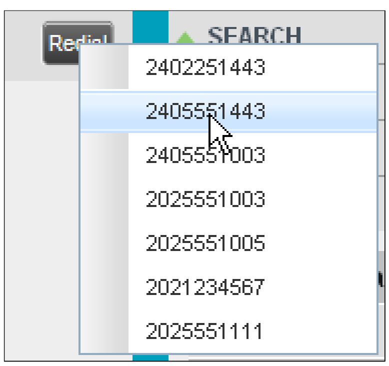


Figure 36 Dialer – Redialing Number

6.5.3 Dial Contact

You can dial contacts from any directory available in Receptionist.

To dial a 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. A Click-To-Dial action is initiated and your phone rings.

Figure 37 Group Panel – Contact in Focus with Call, Extension, and Mobile Buttons

3) Answer the phone. An outbound call is placed.

4) Alternatively, to dial the contact's extension, click **Extension** EXT or to dial the contact's mobile number, click **Mobile** MOB .

6.5.4 Speed Dial

To speed dial a contact:

1) In the *Contacts* pane, expand the *Speed Dial* panel.

2) Click the contact to expand it and click **Call** CALL**.**

6.5.5 Dial from History

You can dial any number that is available in Call History.

To dial from Call History:

1) In the *Call Console*, click the **Call History** button . The *Call History* dialog box appears.

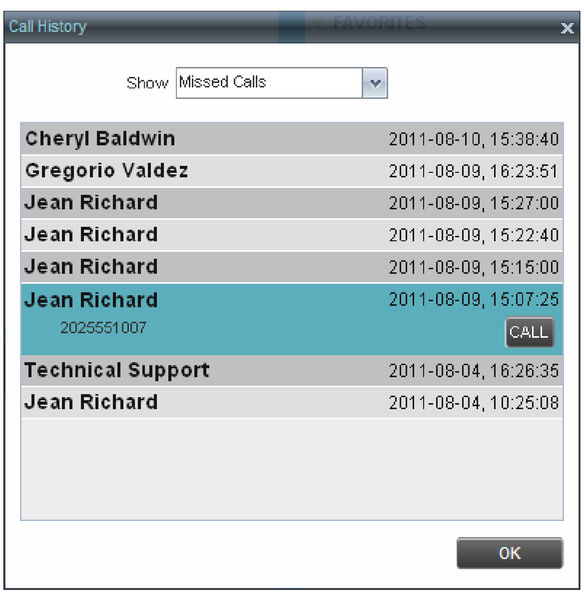


Figure 38 Call History Dialog Box

2) From the *Show* drop-down list, select the grouping you want.

3) Scroll through the list of call logs to find the entry you need.

4) Click the entry to expand it and click **Call** .

6.6 End Call

To end a call:

Click **End** for that call.

6.7 Transferring Calls

There are a number of ways in which you can transfer a call. You can blind transfer calls or transfer calls with consultation or supervision. You can also transfer calls directly to voice mail or to a queue.

6.7.1 Blind Transfer Call

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, expand the panel from which you want to select a contact.

3) Click the destination contact to expand it, and click **Transfer** for that contact. The call is transferred and removed from the *Call Console*.

Alternatively, drag the call onto the target contact and click **Transfer** for that contact.

6.7.2 Conduct Supervised Transfer

When you have an active inbound call that you want to transfer, you can follow this procedure.

To conduct a supervised transfer:

1) In the *Call Console*, select the call to transfer.

2) Dial the number or contact to whom you want to transfer the call.

3) If the dialed contact is busy, either retry or dial another contact.

4) Move the mouse over the new, non-selected call and click **Transfer** .

6.7.3 Transfer with Consultation

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*.

6.7.4 Transfer to Voice Mail

You can transfer a call to a monitored contact's voice mail or to your own voice mail. Calls may be transferred while active, held, or ringing (in) on your phone.

To transfer a call to voice mail:

1) In the *Call Console*, select the call to transfer.
2) In the *Contacts* pane, expand the *Group/Enterprise* or *Favorites* directory and find the contact. Find yourself if you want to transfer the call to your voice mail.
3) Click the contact and click **Transfer to Voice Mail** for that contact.

Alternatively, drag the call onto the target contact and click **Transfer to Voice Mail** for that contact.

> **NOTE**: This option is only available if the contact has the Voice Messaging service assigned and enabled.

You can also transfer an incoming call to voice mail from the *Call Notification* pop-up window.

To transfer an incoming call to your voice mail:

In the *Call Notification* pop-up window that appears when you receive a call, click **Transfer to Voice Mail** .

6.7.5 Transfer to Queue (Enterprise Edition)

You can transfer a current call to any queue that appears in your *Queues* panel. The call is placed at the bottom of the new queue.

To transfer a call to a queue:

1) In the *Call Console*, select the call to transfer.
2) Expand the *Queues* panel.
3) Click the destination queue and click **Transfer** .

The call is transferred and removed from the *Call Console*.

Alternatively, drag the call onto the target queue and click **Transfer** for that queue.

6.8 Parking and Camping Calls

Call parking or camping allows you to find a temporary parking place for the call. If the parked or camped call is not answered within the predefined time, the call is recalled and reappears in your *Call Console*.

6.8.1 Conduct Busy Camp On (Enterprise and Small Business Editions)

Busy Camp On allows you to place a call at a busy contact. The call is automatically transferred to the destination when the contact becomes available to take the call. A call to camp must be active or held, and the destination contact must be either *Busy* or *Ringing*.

> **NOTE**: To use the feature, you need to have the Busy Camp On service assigned and active.

To camp a call on a busy contact:

1) In the *Call Console*, select the call to camp.
2) In your *Group/Enterprise* or *Favorites* directory, click a *Busy* or *Ringing* contact and click **Camp**. Once the call is camped, it is removed from the *Call Console*.

If the call reaches the designated expiration timer before the call is answered, the call is recalled to your device and reappears in the *Call Console*.

6.8.2 Conduct Group Call Park (Enterprise Edition)

Group Call Park searches within a predefined hunt group for an available line on which to park a call. After a designated time, the call returns to the originating operator or a specified hunt group (depending on how the service is configured). If the parking attempt fails for any reason, the call remains in your *Call Console*.

To perform a Group Call Park:

In the *Call Console*, move the mouse over an active or held call and click **Park**. The call is parked on an available extension and removed from *the Call Console*.

If the call reaches the designated expiration timer before the call is answered, the call may be recalled to your device and reappear in your *Call Console*.

6.9 Manage Conference Calls

You manage your conferences in the *Call Console*.

- You use the top area of the *Call Console* to establish a conference and add participants to it.
- You use the *Conference Call* panel to manage or end an active conference.

You can only have one active conference at a time.

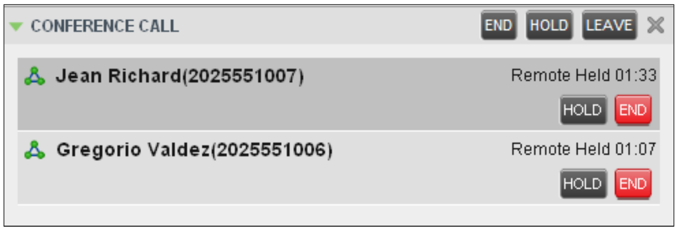


Figure 39 Call Console – Conference Call Panel

To conduct an N-Way conference you must first start a Three-Way conference and then add participants to it.

NOTE: To conduct a conference you must have the Three-Way Call or N-Way Call service assigned.

6.9.1 Start Three-Way Conference

To start a conference you need to have at least two current calls.

To start a conference:

1) If necessary, place calls to participants using any of the methods described in section *6.5 Make and End Calls*.

2) In the *Call Console,* select one of the two calls.

Figure 40 Starting Conference

3) Move the mouse over the non-selected call and click **Conference** 
. A Three-Way Conference is established and the connected calls are moved to the *Conference Call* panel.

6.9.2 Add Participant to Conference

To perform this operation, you need to have the N-Way Call service assigned.

To add participants to a conference:

1) If the call you want to conference in is not yet established, place the call using any of the methods described in section *6.5 Make and End Calls*.
2) In the *Call Console*, move the mouse over the call to add and click **Conference**. The caller is added to the conference.

6.9.3 Hold Conference

To put an active conference on hold:

In the *Conference Call* panel, click **Hold Conference**. This allows other conference participants to continue their conversation.

6.9.4 Resume Held Conference

To resume a held conference:

In the *Conference Call* panel, click **Resume Conference**. All the calls in the conference become active.

6.9.5 Put Conference Participant on Hold

To put a specific conference participant on hold:

1) Expand the *Conference Call* panel.
2) Move the mouse over the target call and click **Hold**.

6.9.6 Resume Conference Participant

To resume a conference participant:

1) Expand the *Conference Call* panel.
2) Move the mouse over the target call and click **Answer**.

6.9.7 Leave Conference

To leave the conference:

In the *Conference Call* panel, click the **Leave Conference** button.

> **NOTE**: This function is only available for Three-Way Conferences.

6.9.8 Remove Conference Participant

To end a selected call in the conference:

1) Expand the *Conference Call* panel.
2) Move the mouse over the call and click **End**.

6.9.9 End Conference

To end the conference:

In the *Conference Call* panel, click **End Conference** 

. This releases all the calls that participate in the conference.

6.9.10 Barge in on Call

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 In** 

. 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* panel.

Alternatively, drag the call onto the target contact and click **Barge In** 

for that contact.

You can now perform any conference operation on the call.

7 Message Contacts (Enterprise Edition)

Receptionist allows you to send e-mail messages to contacts who have messaging configured in the system. You must also have the Messaging feature enabled within Receptionist. For information, see section *12.5 Settings – Messaging*.

7.1 Send E-mail to Contact

To sent an e-mail message to a contact:

1) In the *Group/Enterprise* or *Favorites* directory, click the contact who has an e-mail address configured.
2) Click the **E-mail** button EMAIL for the contact. This brings up a new e-mail window for the configured Messaging service.
3) Write your message and click **Send**.

8 Manage Contacts

Receptionist allows you to view, search, and organize your contact directories.

You use the *Contacts* pane to manage your contact directories, to monitor selected contacts, and to use your contacts to make or manage calls.

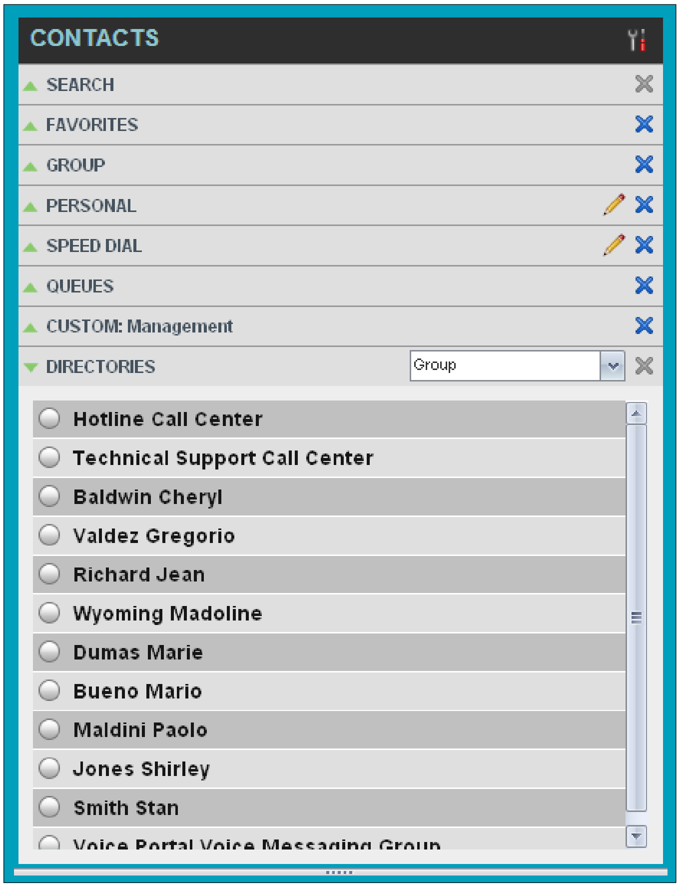


Figure 41 Contacts Pane

For the list of contact directories available in your version of Receptionist, see section 3 *Introduction to Receptionist*.

For information on monitoring contacts, see section 9 *Monitor Contacts*; for more information on call-related functions, see section 6 *Manage Calls*.

This section describes the directories management functions provided by Receptionist.

- Show/Hide Directories
- Show/Hide Directory Content
- Search Contacts
- Order Directory Entries
- View Contact Details and Make Notes (Enterprise Edition)
- Manage Personal Contacts
- Manage Speed Dial Entries

8.1 Show/Hide Directories

Receptionist allows you to specify which directories should be visible in the *Contacts* pane.

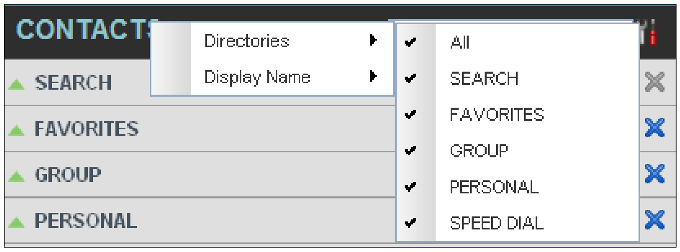


Figure 42 Contacts Pane – Expanded Options Menu

All directories can be displayed individually in the *Contacts* pane.

In addition, you can decide which directories to display in the *Directories* panel (on their own or with other directories), and below the *Call Console*.

To display or hide a directory in the Contacts pane:

1) At the top right-hand side of the *Contacts* pane, click **Options** .
2) From the menu that appears, select *View*, then *Directories*, and then select or unselect the directory to display/hide. To display all directories, select *All*.

   To hide a directory, you can also click the **Close** button  in that directory's panel.

> **NOTE**: You cannot close the *Directories* panel.

To display a directory in the *Directories* panel:

In the *Directories* panel, select the directory to display from the drop-down list. To display all directories, select *Show all*.

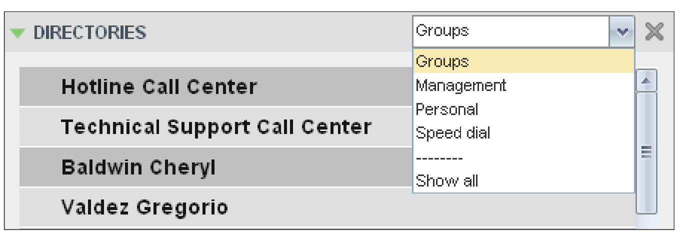


Figure 43 Directories Panel – Selecting Directory to Display

To display a directory below the Call Console:

1) In the *Directories* panel, select *Show all*.

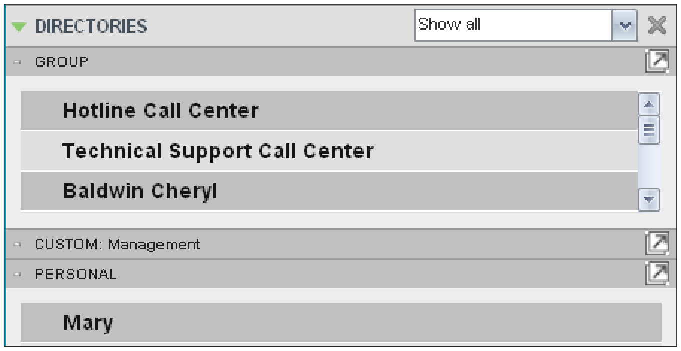
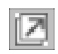


Figure 44 Directories Panel – Selecting Directory

2) Click the **Pullout Directory** button  for the directory to display.

The directory appears below the *Call Console*.

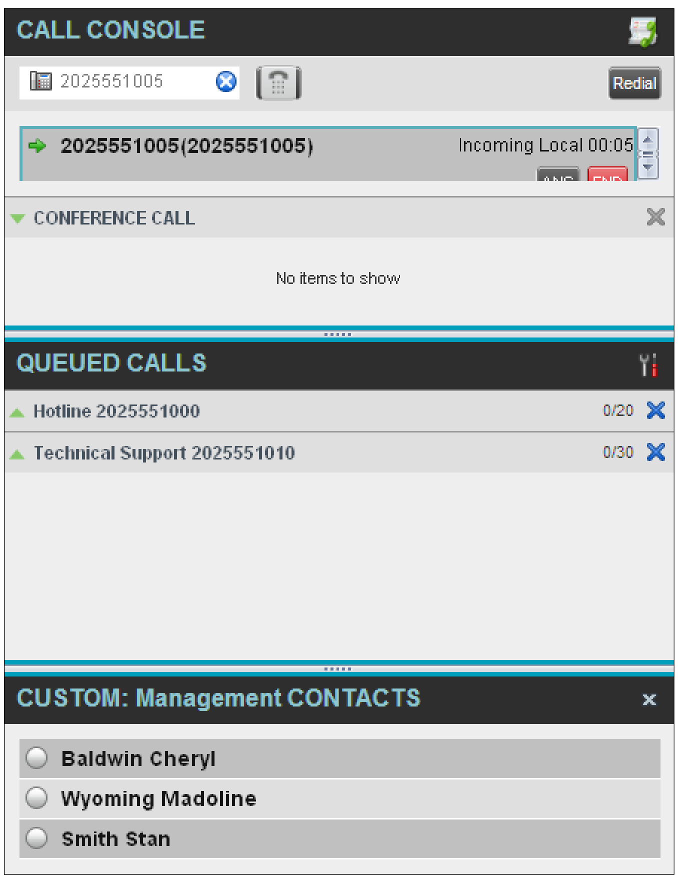


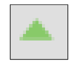
Figure 45 Custom Directory Displayed Below Call Console

3) To close the directory, click the **Close** button  for the directory.

8.2 Show/Hide Directory Content

By default, your directories are collapsed, with only the title bar visible. You can selectively expand directories that you want to consult or use.

To show or hide contacts in a directory:

In the *Contacts* pane, click the **Expand/Collapse**  button for that directory.

8.3 Search Contacts

The Search feature allows you to search for contacts in one, several, or all directories.

You use the *Search* panel located at the top of the *Contacts* pane to perform contact searches.

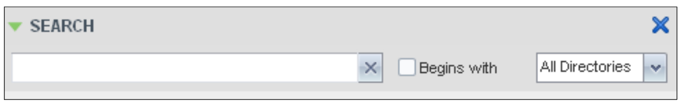


Figure 46 Search Feature

To search one or more directories:

1) In the *Search* text box, enter the text you want to search for and press ENTER. You can enter partial information, such as part of a name or phone number.

   For example, if you do not remember whether Mary's last name is spelled "Shelley" or "Shelly", you can enter "Shell", and either name is returned.

2) To restrict the search to contacts that start with the entered text, check the *Begins with* box.

3) From the drop-down list, select the directories to search.

4) Press ENTER.

   The text you enter is matched against all attributes of every entry in the selected directories.

NOTE: The search is not case-sensitive; the search for "Ann" and "ann" returns the same results.

Search results are displayed in the *Search* panel, each contact listed with the name of the directory where they were found.

BullsEye directories are searched in the following order: Supervisors, Agents, Group/Enterprise. Duplicate search results in BullsEye directories are not displayed; the first match for a given contact is displayed.

Duplicate search results in other directories are displayed.

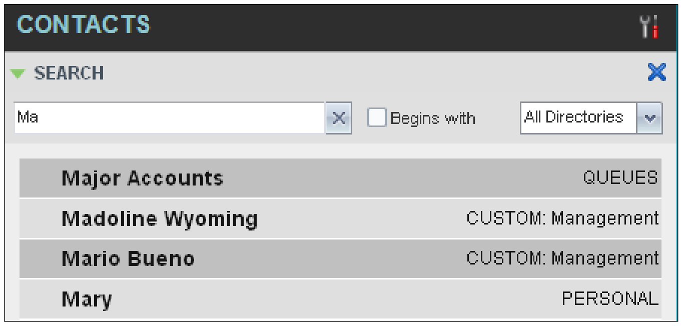


Figure 47 Contacts Pane – Search Results

The search returns either all the contacts (in the selected directories) that contain the entered keyword or all the contacts that start with the entered keyword.

In the first case (*Contains*), entering “Ann” returns all contacts with the name “Ann”, but it also returns all contacts with names such as “Anne”, “Marianne”, “Marie Ann”, “Ann Marie”, and so on.

In the second case (*Starts With*), entering “Ann” returns all contacts with names such as “Ann”, Anne”, and Ann Marie”, but not “Marianne” or “Mary Ann”.

5) To clear the search results, click **Reset** .

NOTE: Contact entries displayed in search results follow the same rules as if that entry was accessed in its own directory. This allows you to perform any operations directly from the search results.

8.4 Order Directory Entries

Receptionist allows you to order directory entries. This setting takes effect immediately. The directories that can be ordered are *Enterprise/Group* and *Favorites* (by first or last name) and *Queue* (by name).

To order a directory:

1) At the top of the *Contacts* pane, click **Options** .
2) From the drop-down list, select *Sort*, then the directory to order, and then the field to sort by.

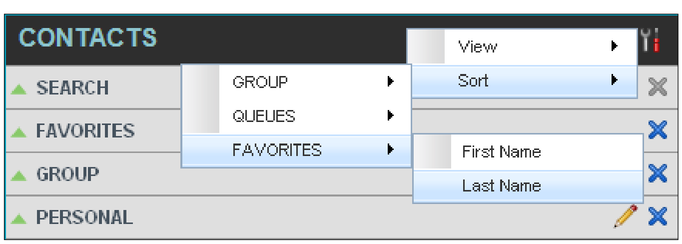


Figure 48 Sort Directory

The contacts in the selected directory are reordered based on the selected field.

3) To view the contacts, click **Expand**  for that directory.

8.5 View Contact Details and Make Notes (Enterprise Edition)

Receptionist Enterprise allows you to view contact information. You can also make notes about the contacts in your *Group/Enterprise* directory.

To view contact details:

1) Expand the target directory panel.

2) Click the contact to view. This expands the row for the contact displaying additional information about the contact, which includes the contact's phone numbers (as provisioned). If a call is parked against the contact and if you are monitoring, the information about the parked call is also displayed.

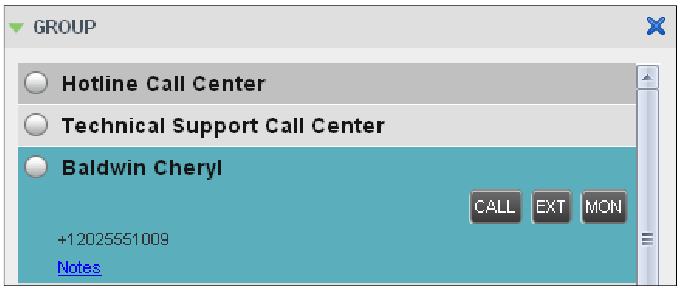


Figure 49 Group/Enterprise Contact Details and Notes

Only one contact per directory can be expanded at a time. When you click a contact, the system automatically hides the details of the previously expanded contact.

To view or make a note about a contact:

1) In the *Group/Enterprise* directory, click the contact.

2) Click the **Notes** link. The *Notes for <Contact Name>* dialog box appears.

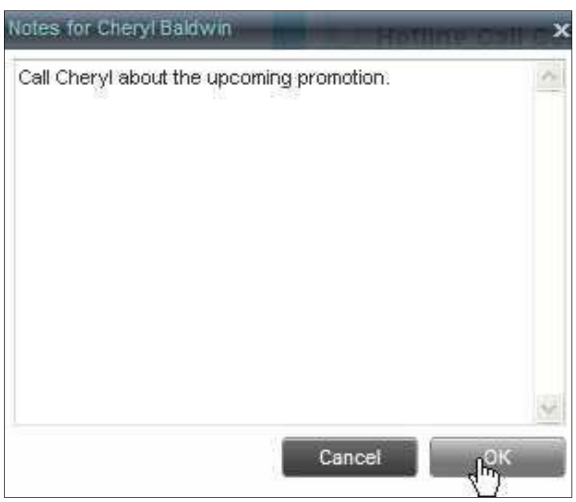


Figure 50 Notes for Cheryl Baldwin Dialog Box

3) Enter the desired text or view or modify the existing text in the *Notes* text box.

4) To save your changes and close the dialog box, click **OK**.

   To close the dialog box without saving, click **Cancel**.

8.6 Manage Personal Contacts

You can add or remove personal contacts via the web portal or in Receptionist, and the updates appear in both places. However, the updates that you make via the web portal appear in Receptionist at the next sign-in.

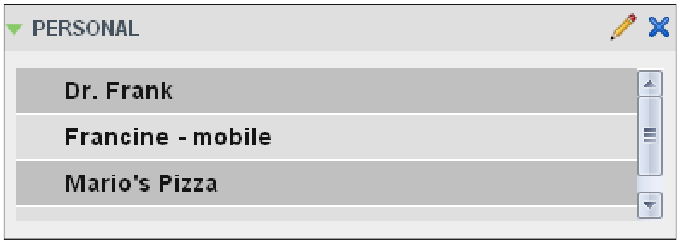


Figure 51 Personal Panel

You can perform the following operations on personal contacts:

- Add Personal Contact
- Delete Personal Contact

You cannot modify a personal contact entry in Receptionist. To modify information for a personal contact, delete the entry and add it again.

8.6.1 Add Personal Contact

To add a personal contact:

1) In the *Personal* panel, click **Edit** . The *Edit Personal Contacts* dialog box appears.
2) Click **Add**. A new line is added below the existing entries, allowing you to define a new entry.

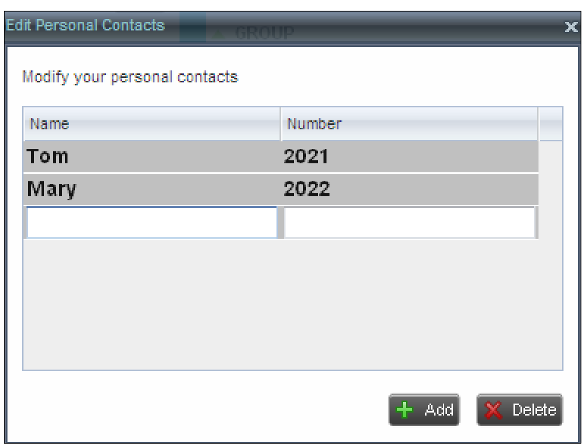


Figure 52 Edit Personal Contacts Dialog Box – Add Entry

3) In the *Name* text box, enter the contact's name or description, as you want it to appear.
4) In the *Number* text box, enter the phone number of the contact.
5) To save the changes, click anywhere in the dialog box outside the entry.

8.6.2 Delete Personal Contact

To delete a speed dial entry:

1) In the *Personal* panel, click **Edit** . The *Edit Personal Contacts* dialog box appears.

2) Select the entry to delete and click **Delete**.

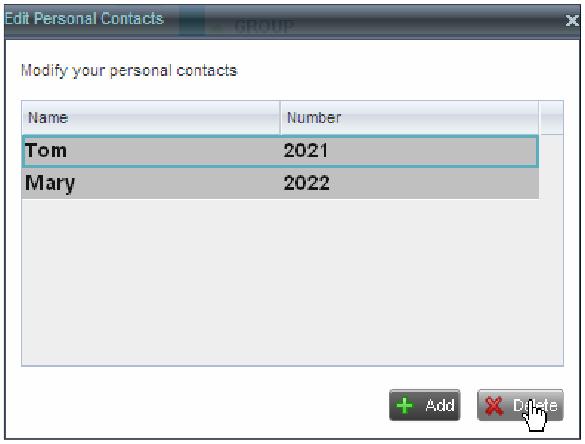


Figure 53 Edit Personal Contacts Dialog Box – Delete Entry

8.7 Manage Speed Dial Entries

This directory is available in all editions of Receptionist. It allows you to manage and use your Speed Dial 8 and Speed Dial 100 entries. To use this feature, you need to have Speed Dial 8 and/or Speed Dial 100 service assigned. If you only have one of these services, you see the entries for that service only in your *Speed Dial* panel.

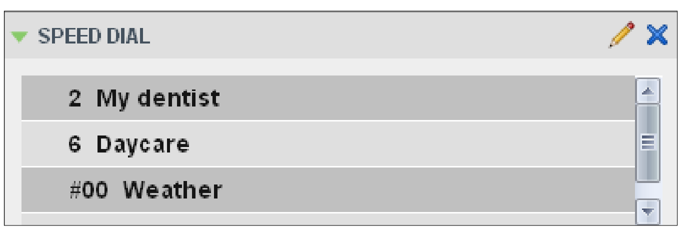


Figure 54 Speed Dial Panel

You can add or remove entries via the web portal or the Receptionist client, and the updates appear in both places. However, the updates that you make via the web portal appear only at the next sign-in to Receptionist.

To update speed dial entries using the client, perform the following operations:

- Add Speed Dial Entry
- Modify Speed Dial Entry
- Delete Speed Dial Entry

8.7.1 Add Speed Dial Entry

To add a speed dial entry:

1) In the *Speed Dial* panel, click **Edit** . The *Edit Speed Dials* dialog box appears.
2) Click **Add**. A new line is added below the existing entries, allowing you to define a new entry.

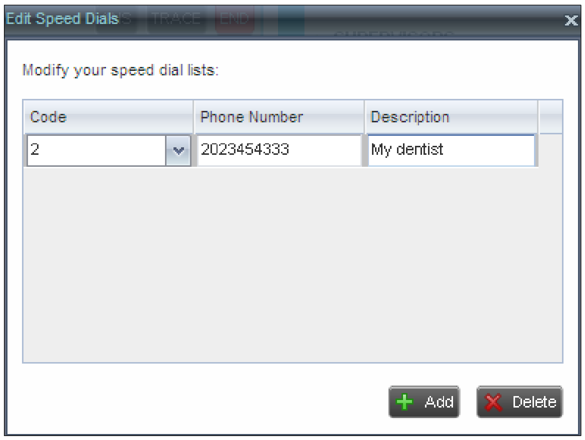


Figure 55 Edit Speed Dials Dialog Box – Add Entry

3) From the *Code* drop-down list on the left, select a speed dial code.
4) In the *Phone Number* text box, enter the phone number to assign to the code.
5) In the *Description* text box, enter a description that allows you to identify the entry.
6) To save the entry, click anywhere in the dialog box outside the entry.

8.7.2 Modify Speed Dial Entry

To modify a speed dial entry:

1) In the *Speed Dial* panel, click the **Edit** button. The *Edit Speed Dials* dialog box appears.
2) Double-click the entry to modify. The entry becomes modifiable.

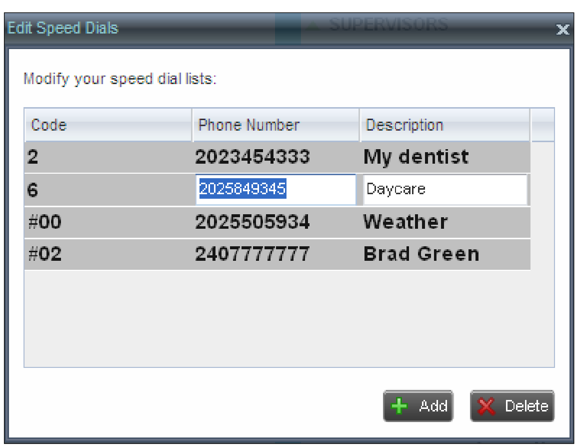


Figure 56 Edit Speed Dials Dialog Box – Modify Entry

3) Modify information as required.

4) To save the changes, click anywhere in the dialog box outside the entry.

8.7.3 Delete Speed Dial Entry

To delete a speed dial entry:

1) In the *Speed Dial* panel, click **Edit** . The *Edit Speed Dials* dialog box appears.

2) Select the entry to delete and click **Delete**.

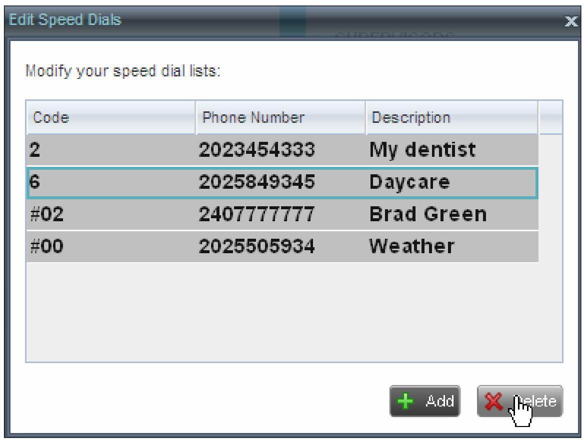


Figure 57 Edit Speed Dials Dialog Box – Delete Entry

9 Monitor Contacts

Receptionist allows you to monitor the call status of selected contacts. All editions of Receptionist allow you to monitor contacts configured through the web portal. This is referred to as static monitoring. In addition, Receptionist Enterprise allows you to monitor selected contacts dynamically.

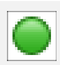
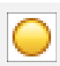
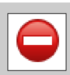
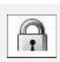
The following table summarizes the monitoring capabilities of the different editions of Receptionist:

Call Status	Description
Enterprise	This is the static monitoring of up to 200 contacts and the dynamic monitoring of a configurable number of contacts enterprise-wide. The maximum number of contacts you can dynamically monitor is configured by your administrator. The default is 100.
Small Business	This is the static monitoring of up to 30 contacts enterprise-wide.
Office	This is the static monitoring of up to 8 contacts group-wide.

You use the *Favorites* panel to view the phone state of statically monitored contacts and the *Group/Enterprise* panel to view the phone state of dynamically monitored contacts.

9.1 Phone States

The phone state of a contact, that is, the state of the contact's phone line, is represented by an icon located to the left of the contact's name. The following table lists the possible phone states for a contact:

Phone State	Icon	Description
Idle		The contact's phone is on-hook (available to receive a call).
Busy		The contact's phone is off-hook (on a call, busy).
Ringing		The contact's phone is ringing.
Do Not Disturb		The contact has the Do Not Disturb service turned on.
Private		The contact has enabled their Privacy feature.
Call Forwarding Always		The contact has the Call Forwarding Always service turned on.
Unknown		The contact is not monitored. **NOTE**: Virtual users cannot be monitored.

9.2 Static Monitoring

To statically monitor contacts, the list of contacts to monitor must be configured on your web portal. The selected contacts appear in your *Favorites* directory. However, the updates that you make to the list of contacts to monitor appear in Receptionist at the next sign-in.

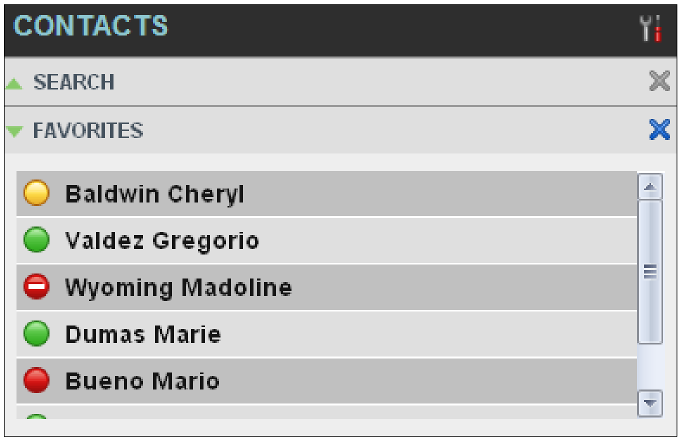


Figure 58 Favorites Directory with Monitored Contacts

9.3 Dynamic Monitoring (Enterprise Edition)

Dynamic Monitoring allows you to view the call status of selected contacts in your *Group/Enterprise* directory. You must request that a contact be monitored. Selected contacts cannot be unselected. When the number of monitored contacts reaches the maximum limit (the default is 100), the first contact that was selected to be monitored is unselected and stops being monitored. The status of a contact that is not monitored is shown as *Unknown*.

Figure 59 Group Directory with Monitored Contacts

NOTE: If a contact in your *Enterprise/Group* directory is statically monitored, then their phone state is displayed without the need to explicitly request dynamic monitoring; however, it counts toward the total number of dynamically monitored contacts.

9.3.1 Request Contact Monitoring

The set of contacts that you dynamically monitor is stored as part of your context information and automatically retrieved and activated on subsequent sign-ins.

To monitor a contact:

In the *Group/Enterprise* directory, click the contact to expand it and then click the **Monitor** button  for that contact.

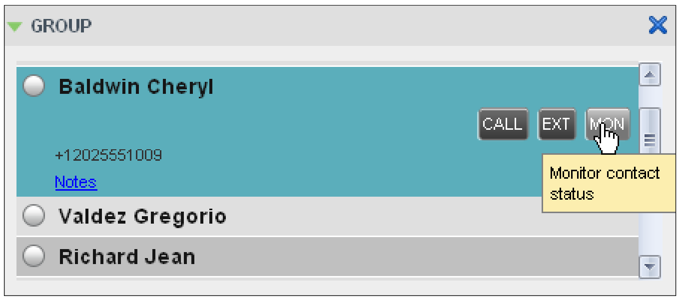


Figure 60 Group Directory – Requesting Contact Monitoring

This requests state notifications from BullsEye for this contact; the contact's state is updated in real time.

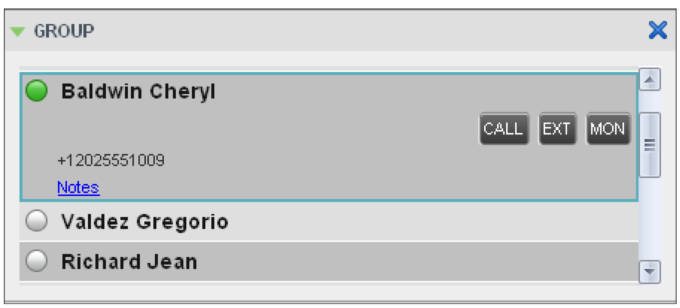


Figure 61 Group Directory – Monitored Contact

10 Manage Call History

You can organize call logs and delete selected call logs or all call logs from Call History.

10.1 View Call History

Call Center allows you to view your passed calls. By default, the calls are grouped into placed, received, and missed calls.

To view your call history:

1) In the *Call Console*, click the **Call History** button . The *Call History* dialog box appears displaying your past calls. The calls are grouped into placed, received, and missed calls. By default, missed calls are displayed.

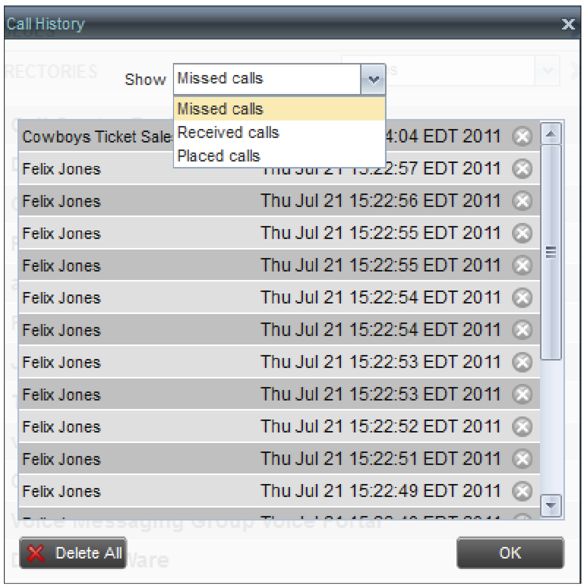


Figure 62 Call History Dialog Box

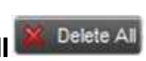
2) To show calls in a specific group, select that group from the *Show* drop-down list.

10.2 Delete Call History

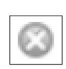
You can delete a selected call log or all call logs from Call History.

To delete call logs from Call History:

1) In the *Call Console*, click the **Call History** button . The *Call History* dialog box appears.

2) To delete all call logs, click **Delete All** .

3) From the *Show* drop-down list, select a grouping.

4) To delete a selected log, click **Delete Call Log**  for that log.

11 Manage Queued Calls (Enterprise Edition)

Receptionist allows you to manage calls in selected call centers (up to five) and monitor calls in real time. You manage queued calls using the *Queued Calls* pane. This functionality is only available if you are supervising call centers or if you have been assigned the BullsEye Supervisor license.

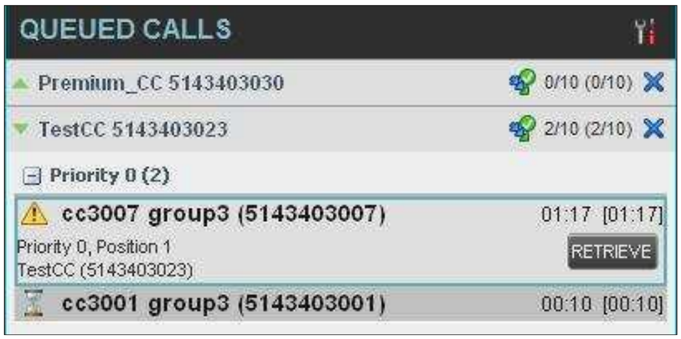


Figure 63 Queued Calls Pane

This section describes the following procedures you perform to manage queued calls:

- Select Call Centers to Manage
- Modify Number of Calls to Display

For each Standard call center that you are monitoring, you can modify the maximum number of calls to be displayed and for each Premium call center you can modify the maximum number of calls that can be displayed in each priority bucket. The total number of calls to display for a call center cannot exceed 50.

1) In the *Queued Calls* pane, click **Options**  and select the *Edit Queue Favorite Dialog* option. The *Edit Queue Favorites* dialog box appears.
2) For each Standard call center you are monitoring, set the total number of calls to display.
3) For each Premium call center you are monitoring, set the number of calls to display in each priority bucket. The total number of calls in all priority buckets cannot exceed 50.

- View Queued Calls
- Retrieve Call from Queue
- Transfer Call to Ad Hoc Number
- Transfer Call Between Queues
- Transfer Call to Top of Queue (Premium Call Center)
- Promote Call in Queue (Premium Call Center)
- Group Calls
- Order Queued Calls

11.1 Select Call Centers to Manage

After you sign in to Receptionist, select the call centers you want to manage (up to five).

To select call centers:

1) In the *Queued Calls* pane, click **Options** and select the *Edit Queue Favorite Dialog* option.

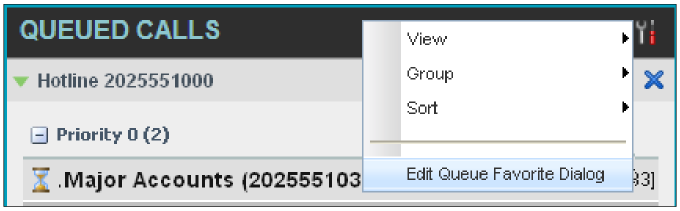


Figure 64 Queued Calls – Options – Edit Queue Favorite Dialogue.

The *Edit Queue Favorites* dialog box appears.

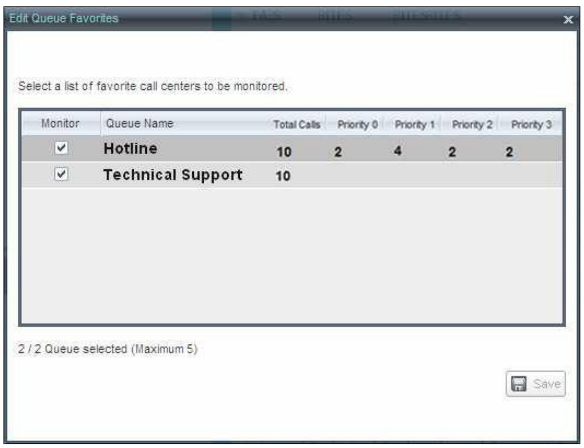


Figure 65 Edit Queue Favorites Dialog Box

2) Select the check boxes for the call centers you want to monitor.

3) Click **Save**.

   The selected call centers appear in your *Queued Calls* pane.

11.2 Modify Number of Calls to Display

For each Standard call center that you are monitoring, you can modify the maximum number of calls to be displayed and for each Premium call center you can modify the maximum number of calls that can be displayed in each priority bucket. The total number of calls to display for a call center cannot exceed 50.

4) In the *Queued Calls* pane, click **Options** and select the *Edit Queue Favorite Dialog* option. The *Edit Queue Favorites* dialog box appears.

5) For each Standard call center you are monitoring, set the total number of calls to display.

6) For each Premium call center you are monitoring, set the number of calls to display in each priority bucket. The total number of calls in all priority buckets cannot exceed 50.

11.3 View Queued Calls

To view calls in a queue:

Click the **Expand** button for that queue.

11.4 Retrieve Call from Queue

You can retrieve a call from a queue to your phone device.

To retrieve a call from the queue:

In the *Queued Calls* pane, click the call to expand it and click **Retrieve** for that call.

Once you retrieve the call, the call appears in the *Call Console*, and you treat it as any other call.

11.5 Transfer Call to Ad Hoc Number

To transfer a call to an ad hoc number:

1) In the *Queued Calls* pane, select the call.
2) In the *Dialer*, enter the destination number and click **Transfer** .

Figure 66 Ad Hoc Queue Transfer

The call is transferred and removed from the queue.

11.6 Transfer Call Between Queues

To transfer a call to another queue:

1) In the *Queued Calls* pane, select the call.
2) In the *Contacts* pane, expand the *Queues* panel.
3) Click the target queue and click **Transfer** for that queue.
   The call is transferred and removed from the original queue.

11.7 Change Position of Call in Queue

To change the position of a call in the queue:

1) In the *Queued Calls* pane, click the call and click **Reorder** .

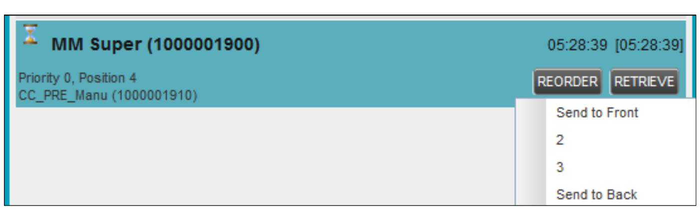


Figure 67 Reordering Queued Call

2) In the drop-down box that appears, select the new position in the queue.

The call is placed at the new position.

NOTE: The list can contain a maximum of 24 reorder positions you can choose from to reorder a call in queue, in addition to *Send to Back* and *Sent to Front* options.

11.8 Transfer Call to Top of Queue (Premium Call Center)

If your administrator has configured the call center with the Transfer to Top feature, follow this procedure to transfer the call to the top of the queue.

You can only transfer a call to the top of the highest priority bucket (bucket with priority "0"). There need to be at least two calls in the target queue.

1) In the *Queued Calls* pane, click the target call to expand it.

Figure 68 Queued Calls – Transferring Call to Top of Queue

2) Click **Reorder** 

and select *Send to Front* from the list that appears.

11.9 Promote Call in Queue (Premium Call Center)

In Premium call centers, a priority is attached to an incoming call based on the DNIS number on which the call is received. You can manually promote calls from a lower priority bucket to a higher priority bucket. A promoted call ends up as the last call in the higher priority bucket with a wait time of zero seconds.

To promote a call, that is, to change its priority:

In the *Queued Calls* pane, select the call to promote and click **Promote** 

.

The queued call is promoted to the end of the next highest priority bucket.

11.10 Group Calls

You can group queued calls by their priority bucket.

To group or ungroup queued calls:

1) In the *Queued Calls* pane, click **Options** 
, select *Group,* and then select or deselect *Group by priority*. This action applies to all monitored call centers.

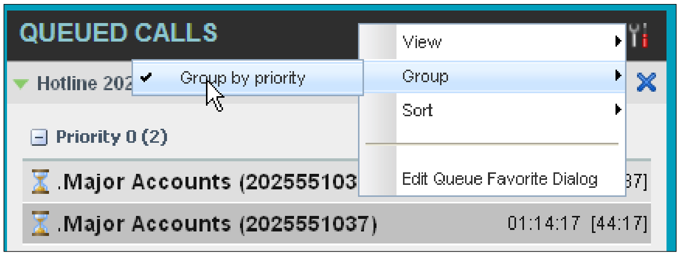


Figure 69 Queued Calls – Options – Group

2) To ungroup calls, unselect the *Group by priority* option.

11.11 Order Queued Calls

Queued calls can be ordered according to their total waiting time or according to their waiting time in the current priority bucket.

To order queued calls:

1) In the *Queued Calls* pane, click **Options**  .

2) Select *Sort* and then the ordering option you want. This operation applies to all monitored call centers.

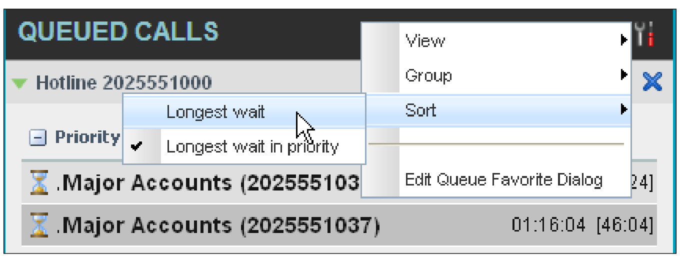


Figure 70 Queued Calls – Options – Sort

NOTE: The ordering does not work when calls are grouped. If needed, first ungroup the calls.

12 Configure Receptionist

You use the Settings link at the top right-hand corner of the main page to access the *Settings* page where you can configure various aspects of the Receptionist application.

NOTE: Do **not** use the internet browser's Back button to return to the main interface.

This section describes the *Settings* pages that you use to configure Receptionist:

- Settings – General
- Settings – Application
- Settings – Services
- Settings – Plug-ins
- Settings – Messaging
- Settings – About

12.1 Settings – General

You use the General tab to configure miscellaneous settings that improve the usability of Receptionist.

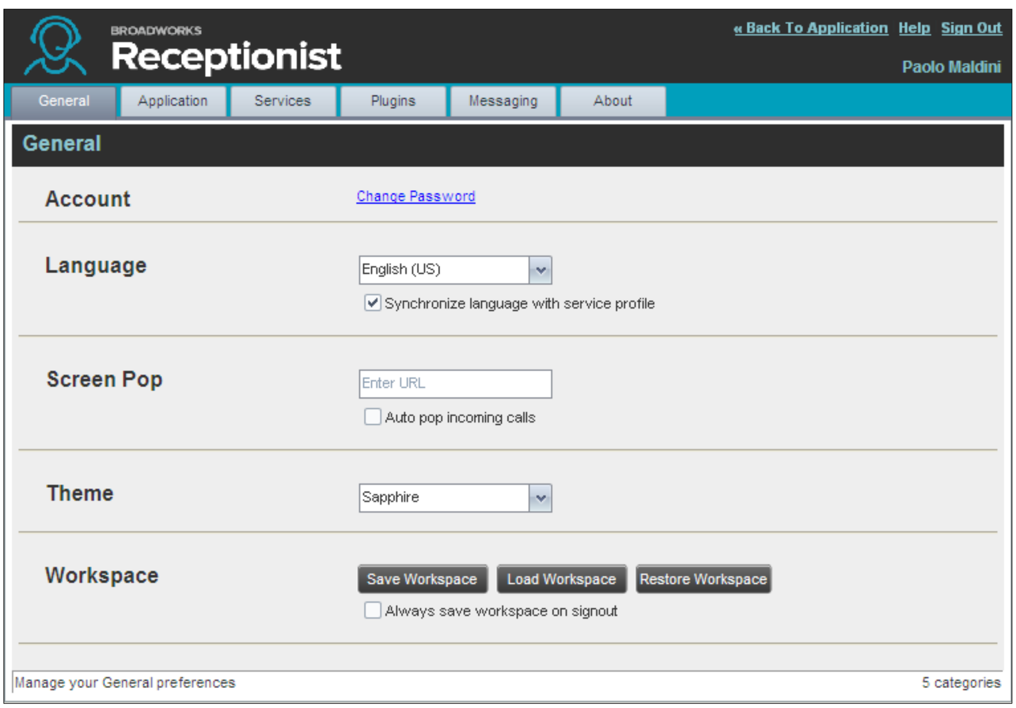


Figure 71 Setting – General

The following subsections describe the settings that can be configured on this page.

12.1.1 Account

You use this area to change your BullsEye password.

Receptionist shares login credentials with BullsEye. So when you change your password here, remember to use this new password when accessing your web portal.

NOTE: The password you enter must meet password requirements set on BroadWorks.

To change your password:

1) Click the **Change Password** link. The section expands, allowing you to change your password.

Figure 72 Account – Change Password

2) Enter your current and new password and click **Change Password**.

   Note that the Reset button does not reset your password. It only clears the input boxes.

12.1.2 Language

The *Language* settings allow you to select the language of the user interface.

- The drop-down list identifies the languages available in your edition of Receptionist. To change the language, select a new language from the list.
- *Synchronize language to my profile* – When this option is checked, Receptionist synchronizes the language with your BullsEye profile and ignores the language selection on this page.

12.1.3 Screen Pop

You use the *Screen Pop* settings to configure the URL that may be launched on incoming calls.

- *Enter URL* – This text box allows you to enter the URL address of the web page that Receptionist opens using the default browser when you click the Web Pop URL button in the *Call Notification* pop-upwindow.
- *Auto pop for Incoming Calls* – When this option is checked, Receptionist launches the Web Pop URL without your being required to click the Web Pop URL button in the *Call Notification* pop-up window for each incoming call.

BroadSoft Professional Services is available to design web applications that can interface with different databases.

The URL can point to any URL address, but typically points to a web application that parses optional call parameters and passes them to a Customer Relationship Management (CRM) application or other database. For example:

```
http://www.mysite.com/webapp.php?remoteNumber=_REMOTE_PHONE_&sp=_S
ERVICE_PROVIDER__
```

This URL passes the incoming calling number and the service provider ID to the web application at www.mysite.com. The web application formats the data for the applicable database and launches the web page on your PC.

There are a number of optional parameters that the client can pass to the browser. The following list summarizes these parameters:

- __USER : The user's BullsEye ID (Note that in this case, the "user" is the BullsEye subscriber.)
- __FIRST : The first name of the user
- __LAST : The last name of the user
- __EMAIL : The e-mail address of the user
- __GROUP : The name of the BullsEye group to which the user belongs
- __SERVICE_PROVIDER : The name of the BullsEye service provider to which the user belongs
- __PHONE : The phone number of the user
- __REMOTE_PHONE : The phone number of the remote party
- __REMOTE_NAME : The name of the remote party (when available)
- __CALL_TYPE : "Incoming" or "Outgoing"
- __DNIS_NAME : The name of the DNIS on which the call was received
- __DNIS_PHONE : The phone number of the DNIS on which the call was received

12.1.4 Theme

This setting allows you to modify the look and feel of the client. To change the theme, select a new theme from the drop-down list.

12.1.5 Workspace

Receptionist allows you to customize elements of your workspace, such as the size and placement of the main window on the desktop. The system remembers the setup between sessions.

The following elements can be customized:

- The size and position of the web browser window in which the main interface is displayed
- The size of the panes (*Call Console, Contacts*, and *Queued Calls*)

NOTE: This functionality does not work in Internet Explorer, due to a technical limitation of Internet Explorer.

Buttons:

- *Save Workspace* – This button, when clicked, saves the current workspace.
- *Load Workspace* – This button, when clicked, arranges your workspace according to the last saved configuration.
- *Restore To Default* – This button, when clicked, restores the workspace to the system default configuration.
- *Always save workspace on signout* – When you sign out from the client, Receptionist asks you whether you want to save your current workspace. To save your workspace automatically when signing out without being asked, check the *Always save workspace on signout* box.

To customize your workspace:

1) Arrange the windows the way you like.
2) Click the **Save Workspace** button to save the current configuration. To restore the system default, click **Restore To Default**.
3) At any time to return to the last saved configuration, click the **Load Workspace** button.

12.2 Settings – Application

You use the Application tab to configure your availability to take calls as well as the policies used to process calls.

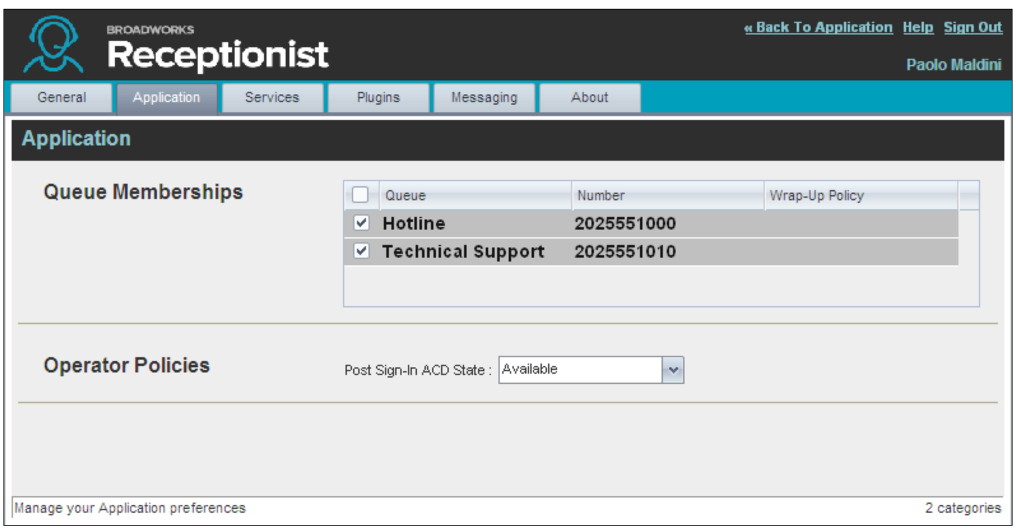


Figure 73 Settings – Application

The settings can be configured on this page and are described in the following subsections.

12.2.1 Queue Membership

These settings allow you to select which queues you want to join.

To join queues:

1) To join a specific queue, select the check box on the line for the queue.
2) To join all queues, select the check box in the column header.

> **NOTE**: If you are not allowed to join/leave a queue, the line for the queue is dimmed and you can only view your join status in the queue. To change your join status in a queue if you are not allowed to do it yourself, contact your administrator.

For queues on this page, you can select columns to appear and you can sort and group queues by any column.

12.2.2 Operator Policies

The *Operator Policies* setting allows you to select your post sign-in state in your queues.

Sign-In State – This drop-down list allows you to select your availability to receive calls from queues upon signing in to Receptionist.

12.3 Settings – Services

You use the Services tab to configure various services assigned to you by your administrator on BullsEye, which are applicable to Receptionist. These settings are only available if you have been assigned such services. For more information, see your administrator.

The services are grouped into two categories: Active and Inactive.

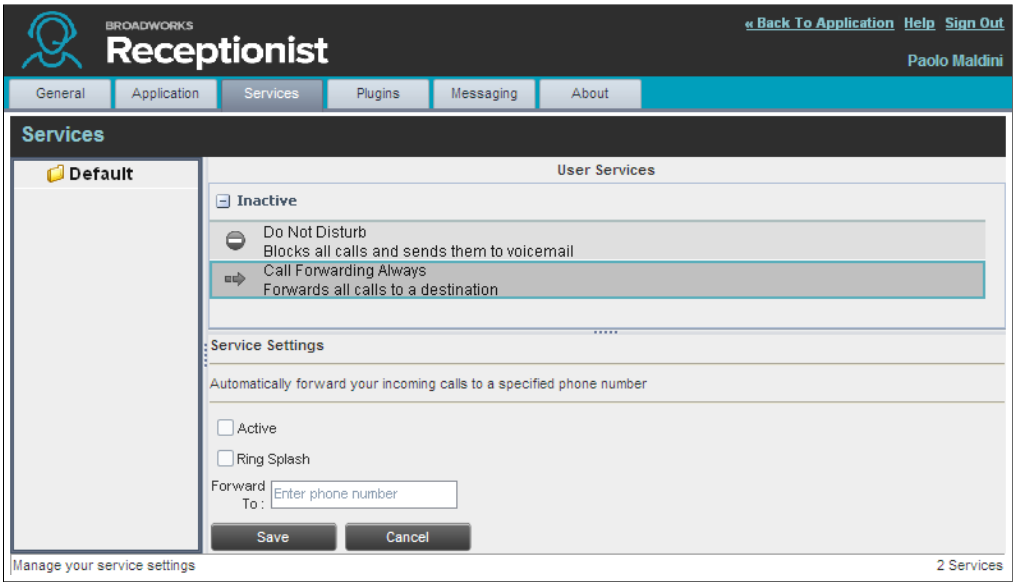


Figure 74 Settings – Services

The services that you can configure (if you have been assigned the services) are:

- Do Not Disturb – When you activate this service, you are not available to take calls, and all your calls are automatically sent to your voice mail.
- Call Forwarding Always – When you activate this service, you need to provide the phone number to forward your calls to. When the service is active, all your calls are forwarded to the specified number.

To activate a service:

1) Select the service and check the *is Active* box. The service is moved from the *Inactive* to *Active* category.
2) If you enabled the Call Forwarding Always service, in the *Forward To* text box that appears, enter the phone number to forward the calls to.
3) To generate a ring splash for incoming calls, check the *RingSplash* option.
4) To save your changes, click **Save**.

12.4 Settings – Plug-ins

You use the Plugins tab to configure the plug-in software used by Receptionist to provide functionality such as call notification, LDAP and Outlook directories, program shortcuts, and call logs.

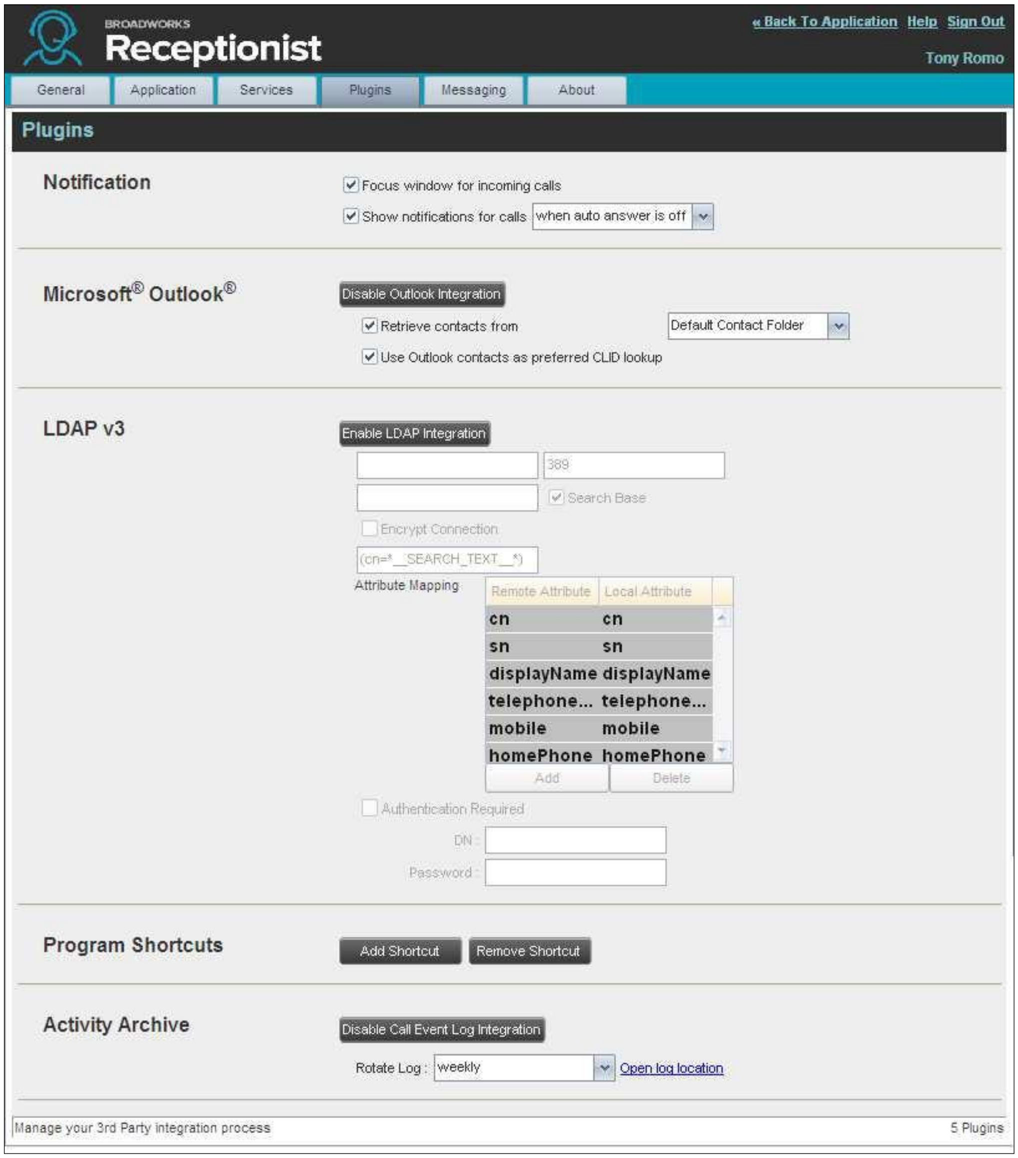


Figure 75 Settings – Plugins

12.4.1 Notification

These options control when and how incoming call notification “pop-up toasts” are displayed. The options you can set are as follows:

- *Focus window for incoming calls* – When this option is checked and the browser window running Receptionist is minimized, Receptionist automatically restores the window on incoming calls.

This does not work in Firefox. In Internet Explorer, there must be only one tab open in the web browser running Receptionist.

- *Show notifications for calls* – When this option is checked, Receptionist displays the *Call Notification* pop-up window on top of other applications' windows when you receive a call. When you check this box, you need to select an option from the drop-down list to specify the condition under which notifications are displayed.

  This does not work if there are other tabs open in the same web browser window as Receptionist. In addition, if calls come within eight seconds of each other, the *Call Notification* pop-up window only appears for the first call of that series.

12.4.2 Microsoft Outlook

The Microsoft Outlook options control Outlook integration with Receptionist. They are only visible if Outlook integration is enabled in Receptionist.

The options you can set are as follows:

- *Enable/Disable Outlook Integration* – This determines whether Receptionist integrates with Outlook to provide you with access to your Outlook contacts. If Outlook integration is disabled, the corresponding desktop plug-in software components are not downloaded from BullsEye.
- *Retrieve contacts from* – This option allows you to specify where to look for your Outlook contacts.
- *Use Outlook contacts as preferred CLID lookup* – When this option is checked, Receptionist uses Outlook to try to identify a caller, when the caller ID is unknown.

12.4.3 LDAP v3

LDAP settings allow you integrate an *LDAP* directory with Receptionist. These options are only visible if LDAP integration is enabled in Receptionist. If you do not know the appropriate settings, contact your system administrator.

Make sure you have correctly imported a valid certificate in the Java Keystore (JKS) with the keytool.

To import a certificate:

1) Click **Start** and then select *Run…*
2) Type "cmd" and click **OK**.
3) Type "<Java Runtime Path>\bin\keytool -import -alias <aliasname> -file <path><certificate file name> -keystore %JAVA_HOME%\jre\lib\security\cacerts".

To verify the certificate:

1) Click **Start** and select *Run…*
2) Type "cmd" and click **OK**.
3) Type "<Java Runtime Path>\bin\keytool -printcert -file <path><certificate file name>".

The *LDAP* directory options are as follows:

- *Enable/Disable LDAP Integration* –This determines whether Receptionist provides *LDAP* directory lookup services. Clicking the **Enable LDAP Integration** button enables the controls for LDAP settings.
- *LDAP Hostname* – This is the network address of the LDAP server.

- *LDAP Port* – This is the port number for the LDAP server. This is compulsory and can be obtained from your system administrator.
- *Search Base* – The text box determines the location in the LDAP server tree that Receptionist looks in when executing a search. The check box, when checked, searches all sub-trees within the search base until the specifications are found.
- *Encrypt Connection* – This option determines whether Receptionist uses encryption when connecting to the LDAP server. Note that if encryption is enabled, you may have to use of a different port.
- *("cn=_ _Search_ _Text")* – This option specifies an additional search filter to apply to all directory searches. For example, to include the search criteria in the filter you must include (cn=* SEARCH_TEXT *). Alternatively, in another example, "(telephoneNumber=*)" restricts search results to users who have a telephone number assigned.
- *Attribute Mapping* – This table controls the way that Receptionist maps attributes returned from the directory server to columns displayed in the list of search results.

  In each row of the table, enter an LDAP attribute in the *Remote Attribute* column. Enter a corresponding local attribute in the *Local Attribute* column. Typical Remote Attribute values are "cn", "sn", "telephoneNumber", "mobile", "homePhone", and "mail".
- *Authentication Required* – When this box is checked, Receptionist must provide a user name and password to the directory server to conduct searches.
- *DN* – This is the user name Receptionist uses when connecting to the LDAP server when *Authentication Required* is checked.
- *Password* – This is the password that corresponds to the authentication *DN*.

12.4.4 Program Shortcuts

You use the *Program Shortcuts* settings to create Receptionist shortcuts on your desktop for convenient access to Receptionist.

The program shortcuts plug-in allows for the creation of a desktop shortcut on a Windows platform, which when clicked, launches Receptionist in your default web browser.

- Add Shortcut – This button, when clicked, creates a Receptionist shortcut on your desktop.
- Remove Shortcut – This button, when clicked, removes the previously created Receptionist shortcut. If you did not create a shortcut using the Add Shortcut button, the Remove Shortcut button has no effect.

12.4.5 Call Event Log

This plug-in software provides the ability to store call event statistics locally on your computer.

- Enable/Disable Call Event Log Integration – This double-action button allows you to enable or disable log archival on your computer.
- Rotate Log – This parameter allows you to specify the frequency with which the log is rotated. You select the frequency from the drop-down list.
- Open Log Location – This link, when clicked, goes to the location on your computer where the log is stored.

12.5 Settings – Messaging

The Messaging tab allows you to configure various messaging options for Receptionist. Currently, only e-mail messaging is supported.

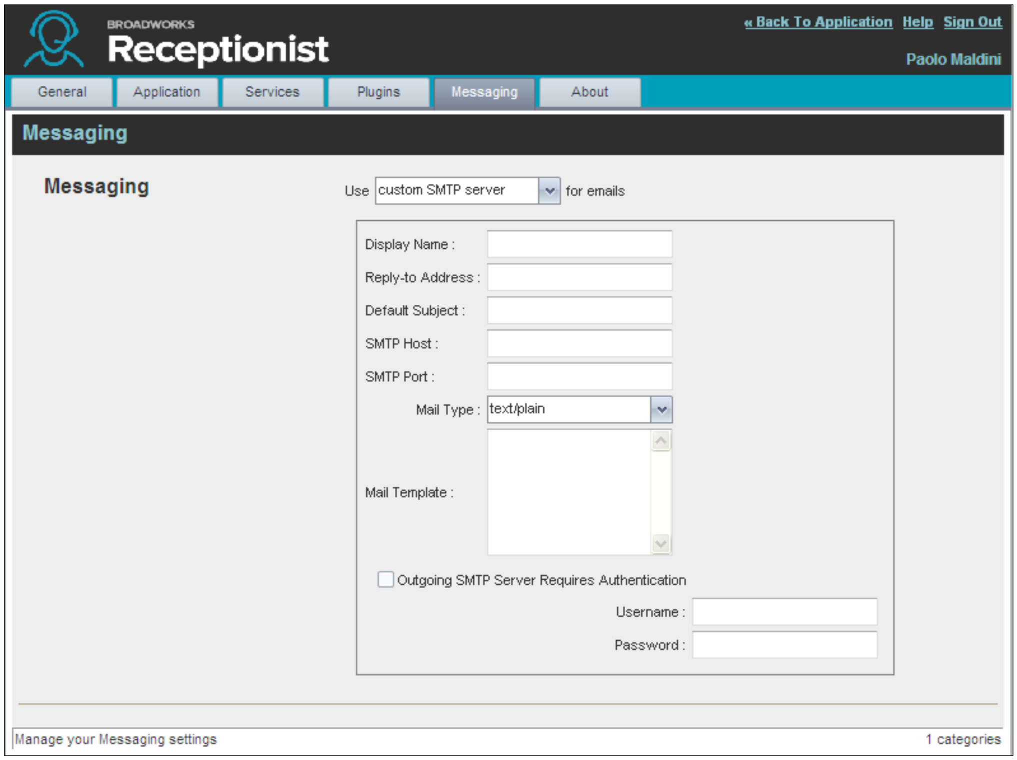


Figure 76 Settings – Messaging

From the drop-down list, select the mail client to use for e-mails.

If you selected the *custom SMTP server* option, you also need to configure the following options:

- *Display Name* – This is the name that is displayed in the *From* field.
- *Reply-to Address* – This is the address where reply messages can be sent.
- *Default Subject* – This is the subject that appears when you generate an e-mail message in Receptionist.
- *SMTP Host* – This is the IP address of the SMTP host.
- *SMTP Port* – This is the port of the SMTP host.
- *Mail Template* – This is the mail template to use.
- *Outgoing SMTP Server Requires Authentication* – When this option is set, authentication is required to send e-mails.
- *Username* – This is the name you must enter to authenticate yourself.
- *Password* – This is the password part of your authentication credentials.

12.6 Settings – About

Use the About tab to view the information about Receptionist.

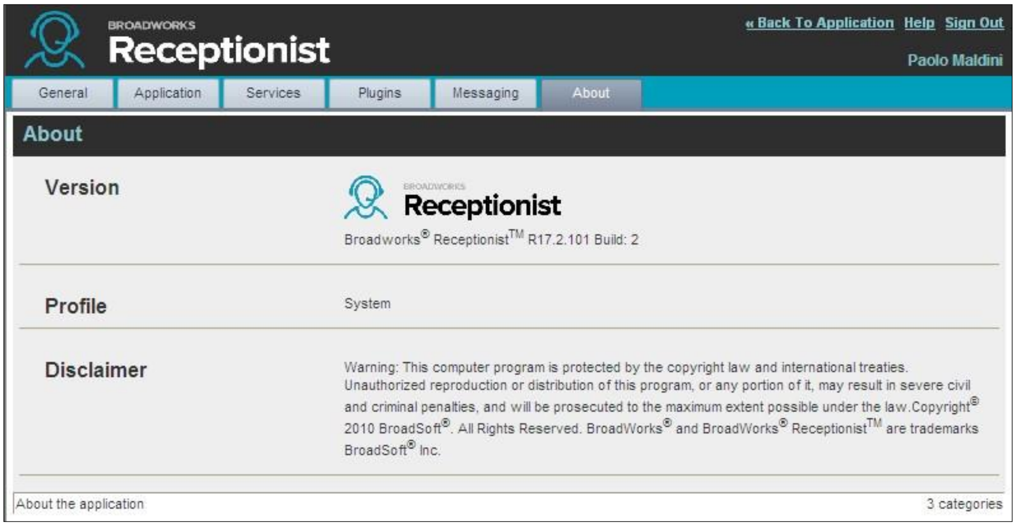


Figure 77 Settings – About Page

The following information is provided on this page:

- Version – This is the software version of the BullsEye Receptionist client.
- Profile – This is the Receptionist client profile used.
- Disclaimer – This is the Receptionist copyright Information.

13 Appendix A: Glossary and Definitions

13.1 Phone States

Phone states show the state of the monitored contact's phone line.

Phone State	Icon	Description
Idle		This is when the contact's phone is on-hook (available to receive a call).
Busy		This is when the contact's phone is off-hook (on a call, busy).
Ringing		This is when the contact's phone is ringing.
Do Not Disturb		This is when the contact has the Do Not Disturb service turned on.
Private		This is when the contact has enabled their Privacy feature.
Call Forwarding Always		This is when the contact has the Call Forwarding Always service turned on.
Unknown		The contact is not monitored. **NOTE**: Virtual users cannot be monitored.

13.2 Call States

Call states are the states that your current calls can be in. They are as follows:

Call State	Display Name	Icon	Description
Ringing In (Local)	Incoming Local		This represents a Click-To-Dial call ringing on your phone.
Ringing In (Remote)	Incoming		The call is coming in and ringing on your phone.
Ringing In (Recalled Call)	Call Recalled		The call was parked or camped and is being recalled because its timer has expired.
Ringing Out	Outgoing		The call is outgoing, ringing out. This is equivalent to a phone ringing on the called party's phone.
Active	Active		The call is an active call.
On Hold	Held		The call is on hold.
On Hold (Remote Held)	Remote Held		The call is held by the remote party.
Active (In Conference)	Active		The call is in a conference and active.
Held (In Conference)	Held		The call is in a conference and on hold.

14 Appendix B: Keyboard Shortcuts

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

Key	Equivalent Mouse Action	Description
ESC	Click the **Close** button in a dialog box.	This closes the open dialog box.
ESC	Cancel the changes.	This exits the currently selected editable item, such as a text box.
/	Click the *Dialer* text box.	This places the cursor in the *Dialer* text box; it retains the currently selected item (if applicable). **NOTE**: In Internet Explorer 8, the "/" shortcut key does not always work. Pressing the key clears the default *Enter Number* text, but does not place the cursor in the input box.
?	Click the *Search* text box.	This places the cursor in the *Search* text box; it retains the currently selected item (if applicable).
ARROW DOWN	Click the scroll bar or the next item in a list.	This selects the next item in the *Call Console* or *Queued Calls* pane.
ARROW UP	Click the scroll bar or the previous item in a list.	This selects the previous item in the *Call Console* or *Queued Calls* pane.
PAGE DOWN	Scroll down one page.	This goes to the next page in the *Call Console* or *Queued Calls* pane.
PAGE UP	Scroll up one page.	This goes to the previous page in the *Call Console* or *Queued Calls* pane.
1….9	Select a call in the *Call Console*.	Pressing "1" selects the first call, pressing "2" selects the second call, and so on.
SPACEBAR	Click **Answer** on the selected incoming call in the *Call Console*.	This answers the selected incoming call or if no call is selected, the incoming call that has been waiting the longest. Pressing the SPACEBAR again answers the next longest waiting incoming call, which puts the previously answered call on hold.
<PERIOD>	Click **End** on a selected call in the *Call Console*.	This ends the selected call.
ENTER	Click **Dial**.	If the cursor in placed in the *Dialer* text box, the entered digits are dialed.
ENTER	Click **Search**.	If the cursor is placed in the *Search* text box, a search is performed.
+	Click **Transfer** in the *Dialer*.	This transfers the selected call to the ad hoc number entered in the *Dialer*.
SHIFT+1..9	Select a ringing call and click **Answer**.	Pressing **SHIFT+1** selects and answers the first ringing call, pressing **SHIFT+2** selects and answers the second ringing call, and so on.
SHIFT+1..9	Select an active call and click **Hold**.	Pressing **SHIFT+1** selects and places the first active call on hold, pressing **SHIFT+2** selects and answers the second active call, and so on.
SHIFT+1..9	Select a held call and click **Retrieve**.	Pressing **SHIFT+1** selects and retrieves the first held call, pressing **SHIFT+2** selects and retrieves the second held call, and so on.

Key	Equivalent Mouse Action	Description
S or s	Click on **Settings** link.	This opens the *Settings* page if main window is in focus.
B or b	Click on **Back to Application** link.	This goes back to the main page from the *Settings* page.
R or r	Click the **Call History** button.	This opens the *Call History* dialog box.
H or h	Click the **Help** link.	This opens this guide in a PDF format.
SHIFT+L or SHIFT+l	Click the **Sign Out** link.	This signs the user out of the application.

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