

Attendant Console Quick Reference Guide

The screenshot shows the Attendant Console interface with the following components labeled:

- 1: Status Bar**: Displays the current call ID (receipt-one (6478472682)) and duration (00:08:41).
- 2: Phone Control Bar**: Contains icons for microphone, mute, hold, transfer, park, and other call management functions.
- 3: Call Status Bar**: Shows a list of active calls with columns for Status, Number, Name, Conversation time, and Type. A context menu is open over the third call, listing actions like Hangup, Hold, Transfer, Consult, Park, Camp-on, Mute, and Create memo.
- 4: Speed Dial Bar & Button**: Includes a Voicemail button and an Add new button.
- 5: Directory Area**: A list of contacts with columns for Name, Status, Business Mobile, Business Number, and Business Email.
- 6: Presence Tab**: A panel showing the presence status of other agents (Carla Sue, John Doe, Logan Higgins, Ralph Page).
- 7: Park Tab**: A panel showing a parked call by Sara Hughes with a 'Get Call From Park' button.
- 8: Info Tab**: A panel displaying detailed information for the selected agent (Sara Hughes), including Home Number, Business Number, Business Mobile, Business Email, and Job Title.

Overview

The Operator Console enables one or multiple operators to manage incoming calls for the main line or a department. If there are multiple receptionists, you can route incoming calls to a queue and the receptionists can be agents.

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A: Status Bar

receipt-one (6478472682) 00:07:24

18:52 Settings Logout

Section A: Status Bar

The main Status Bar provides commonly used functionality (your userID, your telephone number, time in-use, logout button, settings, etc.).

Section B: Phone Control Bar

The Phone Control Bar provides one touch access to common call handling services via a context-based menu (different features are available based on the call state). Call management actions (such as answering, hold, transfer, park, etc.) can be performed using these dedicated buttons or by using shortcut commands from the keyboard. Hover over an icon to see a text description of the feature.



The text box on the left side of Phone Control Bar is used to enter phone numbers. Numbers can be entered via the keyboard or by clicking on the keypad icon to pop-up a dial pad. The Phone Control Bar also provides the option to enable or disable DTMF tones (tones are typically required for browsing IVR trees or inserting pin codes).

Transferring a Call via the Directory

For most operators, this will be the primary use of the console.
- After Answering a Call:

Blind transfer, via the directory

Search the directory and right-click on the desired user.
Note: Avoid clicking on the contact number or a call will start.

In the pop-up menu, hover over "Transfer to" and then slide the mouse over to the user's phone number – this action will complete the transfer. **Or** with the destination user's name highlighted, click on the Transfer icon in the Phone Control Bar.

Consultative transfer, via Conference the directory

Place active call on HOLD

Search the directory and right-click the desired destination.

Click on the contact number to initiate a call.

Of necessary. Announce that you are transferring or conferencing in a caller.

Click the original call that is now on HOLD.

Click the CONFERENCE icon to join both the callers and yourself to the call.

Once you confirm all parties are on the line, you can hangup your end of the call if needed.

Section C: Call Status Bar

The Call Status Bar contains a list of the calls related to a specific phone call. The following information is provided for each call:

- Number of the call (i.e. call 1, 2, 3 etc.)
- Phone number of the operator managing the call
- Call status icon (waiting, hold, etc.)
- Phone number of the calling or called party
- Name of the calling or called party
- Call duration (waiting time or conversation time, depending on the call status)
- Call type (incoming or outgoing)

Selecting a call with the mouse and right-clicking on it exposes a context-based drop-down menu, as shown.



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Section D: Speed Dial Bar and Buttons



Attendants can create one-touch speed dials and/or use shortcut keys to access frequently dialed numbers. Speed dials are stored centrally so they are available to attendants on whatever device they use for login. Hover over a speed dial icon to see details.

History Button

The History button provides a list of placed, received, and missed calls, in separate tabs. Simply click to call any listed number.

Memo Button

The Memo Button provides a quick way to create reminders for calls or actions. Each reminder provides basic contact information (number and contact name) and a notes field. Memos have a reminder function. At the date/time entered, the system will pop-up a notification to remind the operator to:

- Call – directly call the phone number entered.
- Edit – edit the memo.
- Snooze – postpone the memo.
- Close – remove the memo.
- Logout - exit the console.

Section E: Directory Area

The Phone Control Bar provides one touch access to common call handling services. The Directory search box provides access to corporate and personal directories. Operators can search by contact information such as contact name, company name, department, or stored data.

Note: The search function returns results for all the contacts containing the search string in one of their information fields (for example searching "Wil" will return "William White as well as Kevin Green of "Will"ington Co). If configured by the system administrators, agents can use "%", "", and "#" as wildcard characters.*

- First and last name.
- Phone status.
- Extension (or main number)*.
- Business number*.
- Email*.

(*) The last three fields displayed are configurable. For example, users can display the company name instead of the business number.

Section F: Info Tab

The Info Tab presents all the information related to an incoming call or contact, including the data generally not shown in the Directory area.

The following actions are available:

- Call the number.
- Send an email.
- Go to Website.



Section G: Park Tab

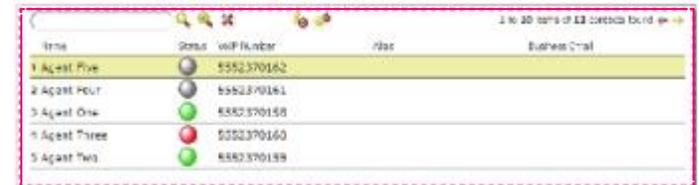
Note: This tab and relative features require park features to be configured in the system.



Use the Park tab to view and/or retrieve parked calls (by any operator).

- The system shows the most significant data for each call, such as calling/called party number and the identity of the operator (by operator number) that parked the call.
- Hovering over the list of calls provides the full name of the operator that parked the call.
- Attendants can retrieve a parked call by clicking on the desired call, right-clicking to expose a command menu and then selecting "Get Call From Park."
- Calls parked via IP Telephones are not shown here and these parked calls do not show on IP Phones.

To view additional information, click on the contact. The system will display any additional information in the Info area.



- To call a contact in the list, click on the phone number.
- Send an email by clicking an email address (the system will automatically open the attendant's default e-mail client).

The system also provides a context-based action menu. Select the contact and right-click to view different actions for the selected contact, including:

- Call.
- Create a speed dial for the contact.
- Create memo.
- Add contact to favorites.
- Search similar contacts

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Section H: Presence Tab



The Presence Tab content is created and managed by the attendant themselves. The tab provides a quick way to monitor and access frequently used contacts. The list includes each contact's phone number and presence status. The Presence list is also a list of favorites and can accelerate the Transfer process as it eliminates the need to type a name into the Directory search box.

Presence states include:

- Available (Green) means they are connected and not on an active call.
- Busy (Red) means they are active on a call.
- Unknown (Gray) means they are either not connected at all or their status is unknown.

Note: Presence services must be enabled by the system administrator.

Section I: Notes

- You must use a desktop computer (Windows or MAC) and a Chrome browser.
- A headset is required to answer and initiate calls from your computer.
- Do not connect using a mobile or tablet.
- If you are also using a SIP hard IP phone with the same userID and telephone number, both devices will ring but you must choose which device to answer the call on. If you answer a call on one device, you must complete the call on the same device.
- This cloud service does not support the *Consult Transfer* feature however it is not greyed out. Please utilize the Conference feature if you must announce callers before transferring to the destination, then hang up.