

PeterConnects

RECEPTIONIST USER MANUAL
VERSIE 1.0



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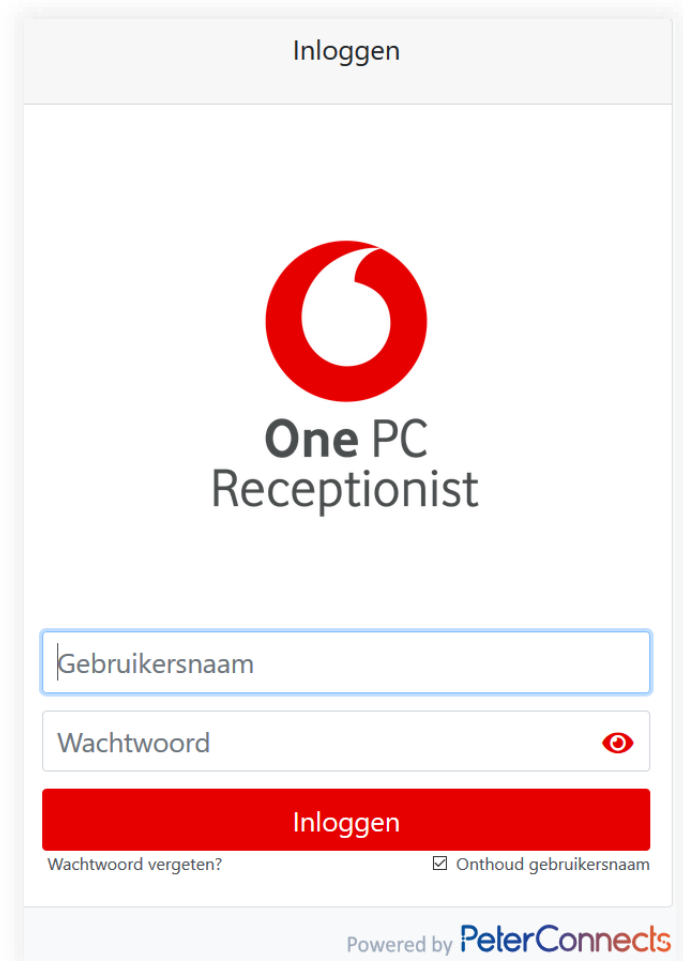
1. Note to the reader

This user manual is aimed at users of the Receptionist. The images and screenshots in this document are made to illustrate the described functionality. Because of this, some details might be intentionally left out. Depending on the version, available features and configuration, the actual application might differ from the screenshots.



2. Login page

When you use the browser to navigate to the receptionist (the URL will be provided by your system administrator), you will be redirected to a login page. Here you can enter your credentials and click 'Login'.



If you have forgotten your password, you can click on the link 'Forgot password?' below the login form. You will be redirected to a webpage where you can reset your password.

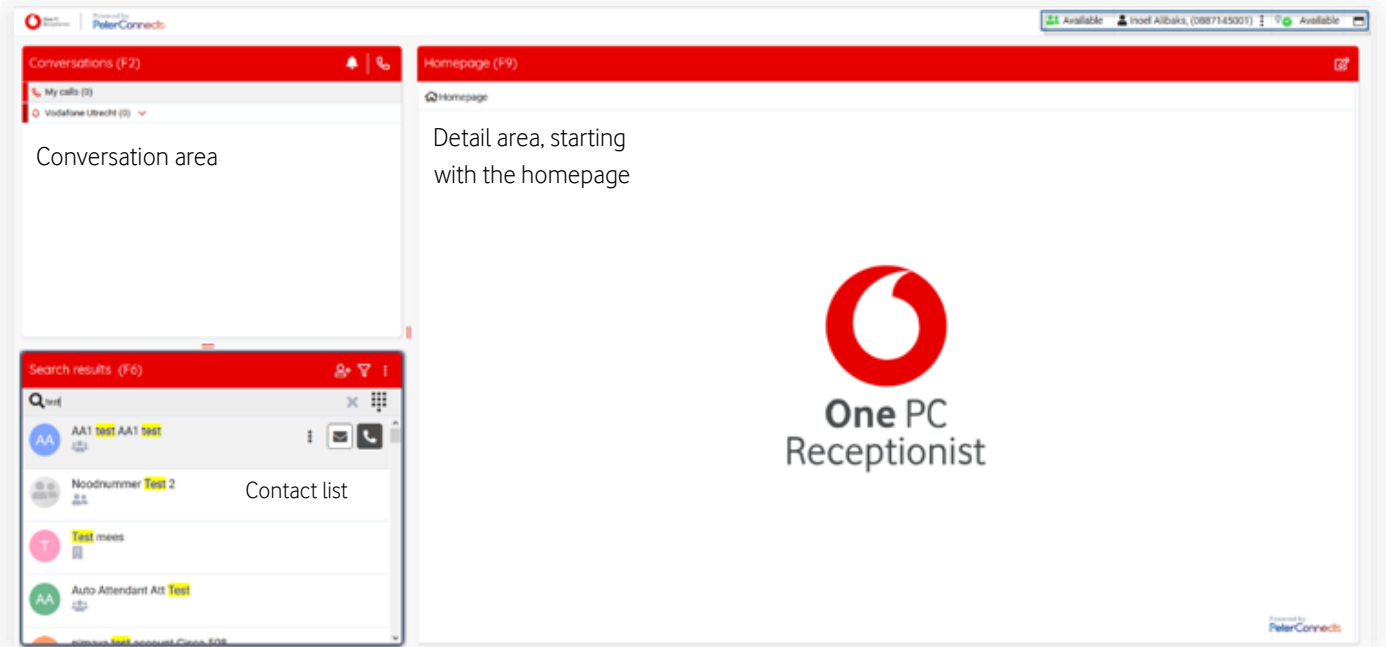
Note that this link is only visible, if your provider has made this feature available.

If you want your username to be remembered the next time you login, you can check 'Remember username'.



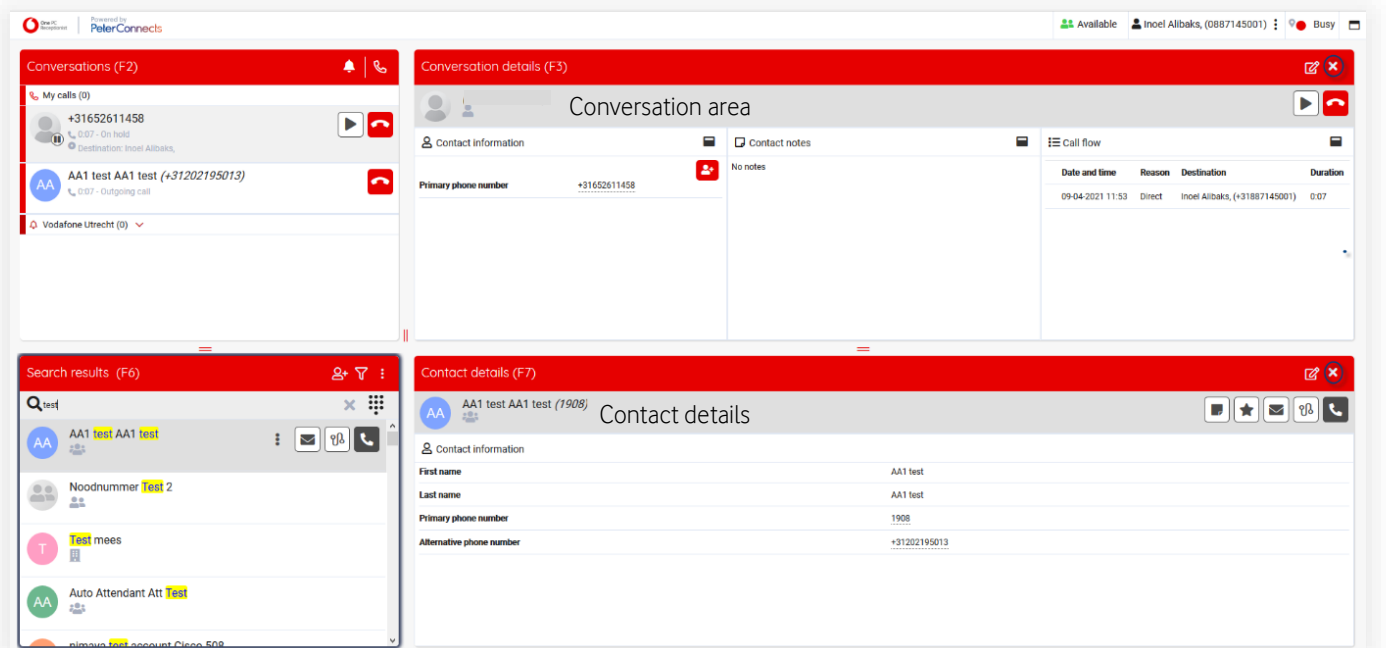
3. The Receptionist main screen

Once logged in, you will see the Receptionist screen. The figure below explains the different areas:



When you click on a conversation in F2, the details of that conversation will be shown in the F3 screen (Conversation details). Clicking on the 'X' will close this screen.

When you click on a contact in the contact list (F6), the details of that contact will be shown in the F7 screen (Contact details). Clicking on the 'X' will close this screen.

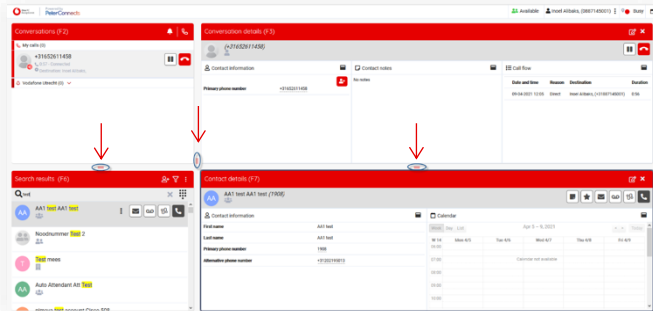


Note that call functionality will be explained in chapter 'Basic call functionality' later in this document.



3.1 Resizing the panels

You can resize the panels to any size you like by dragging the 'splitters' (marked blue arrow below):



The positions of the splitters will be remembered between sessions.

The settings are stored on the PeterConnects server, so you will have the settings available on other devices as well.

3.2 Full screen mode

The menu bar contains a button for making the Receptionist full screen:

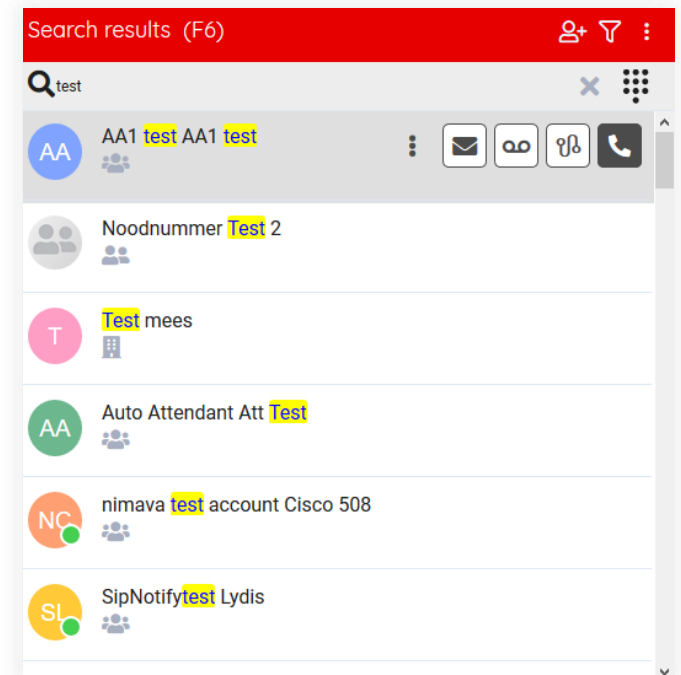


When the full screen mode is on, you can restore the screen to its original size with the restore button:



4. Browsing the Contact list

The contact list will contain all company contacts. The data can be gathered from several sources, such as the Active Directory, Outlook or a company database.



When you hover over or select a contact, you have the following actions available:



Call the contact.



Send a mail to the contact.







Transfer the current call to the contact (only available when you have a current (connected) call).



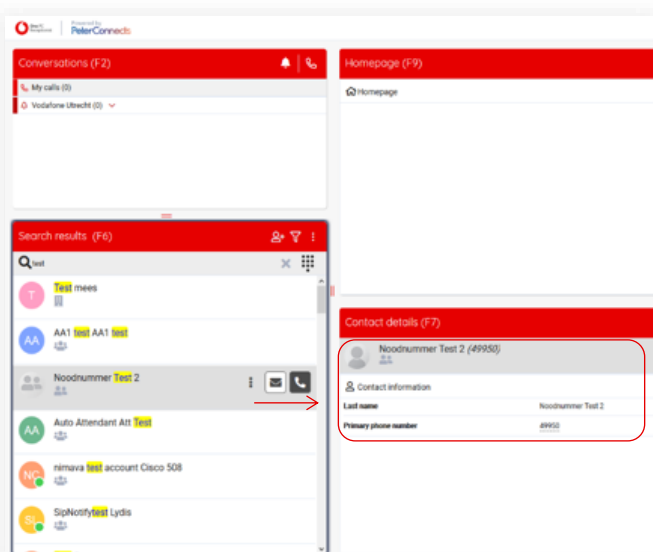
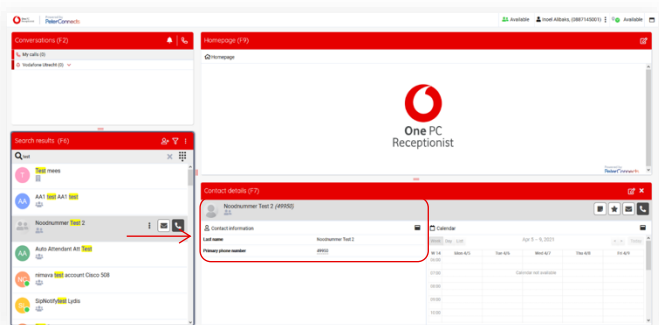
Transfer the current call to somebody's voicemail (only available when you have a current (connected) call).



Contacts are categorized, and this is indicated by the following icons:

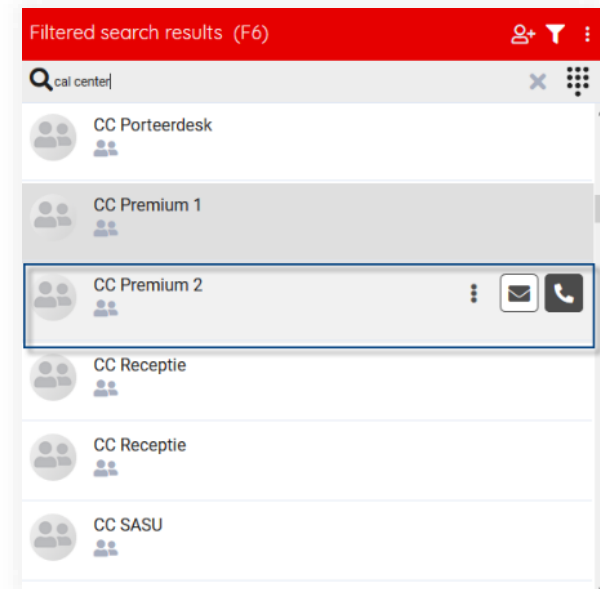
	Personal contact. This contact is only visible to you.
	Group contact. This contact is visible for all persons within your group.
	Companywide contact. This contact is available for all users in the company.
	Queue. This is not a real contact, but a queue to which you can transfer calls.

Click on any contact to see the contact details in the right screen.



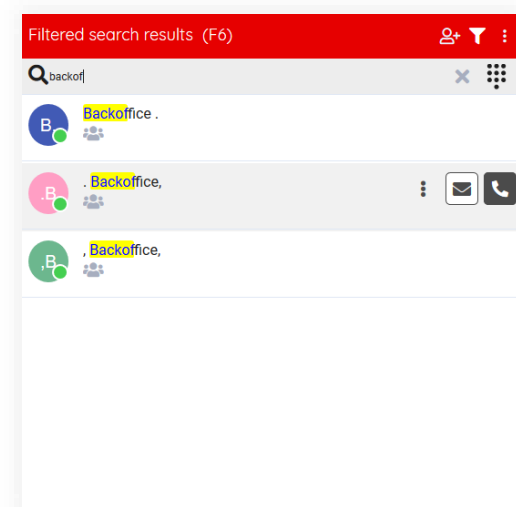
4.1 Queues

As described above, queues are also listed as a contact in the contact list, so you can transfer calls to a queue:

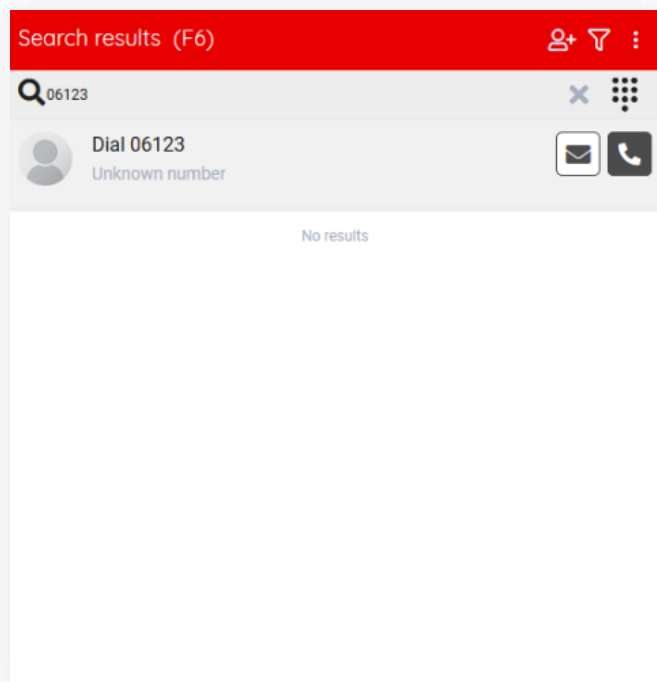


4.2 Searching a contact

You can start typing to enter text in the search box to search in the contact list (you do not have to click into the Search field first). Your search text will be highlighted in the search results:



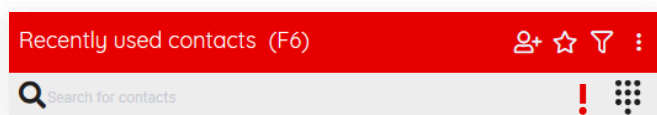
You can also search for a number. When the number is not found, you can still dial that number:



You can click on the X in the search box or press “Escape” to clear the search text.

4.2.1 Restriction of search results depending on license

Depending on your license, you might see an exclamation mark in the search box:

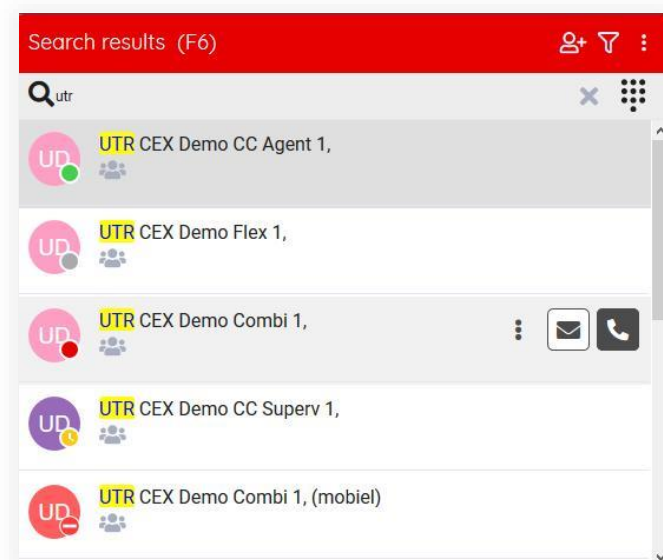


When you hover your mouse over the exclamation mark, you can see that your license might be restricting the number of group contacts that you see.



4.3 Presence

When the application is configured, to show presence states of the contacts in your contact list, then the contact list might look like this:












Depending on the type of telephony system that your company uses, like One Sync premium, the presence state may look a bit different. The colors however will remain the same. They are:

Green:	Available
Red:	Busy or Do Not Disturb
Orange:	Away
Grey:	Offline or unknown state

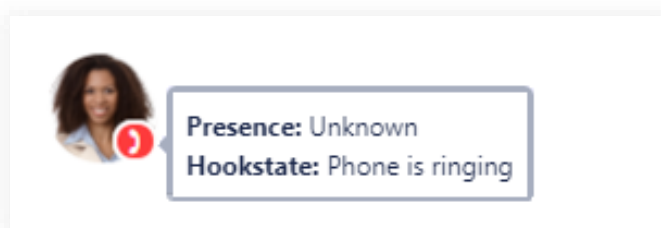


4.4 Hook states

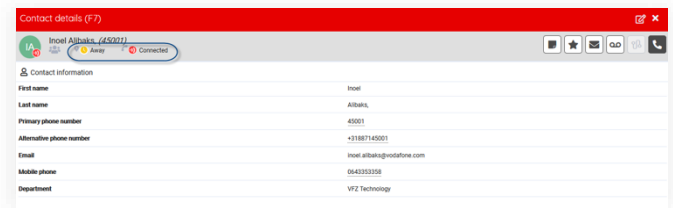
Just like the presence, also the hook states of your contacts are shown. The following hook states can be distinguished:

	Idle: The contact is free.
	Connected: The contact is currently busy in a conversation.
	Hold: The contact currently has a conversation on hold.
	Ringing: The phone of the contact is currently ringing.
	Dialing: The contact is currently dialing a number.
	Do not disturb: The contact has turned on the function "Do not disturb". This state overrides all the hook states above.
	Call Forwarding always: The contact is automatically forwarding all calls. This state overrides all the hook states above. The number to which the calls are forwarded is shown in the tooltip:
	

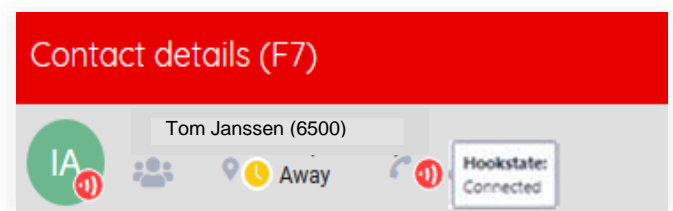
When the contact has any of these hook states, it overrides the presence state. When you hover over the hook state, then you can see both states:



In the Contact details panel (F7) and Conversation details panel (F3) you see both the presence state and the hook state simultaneously:

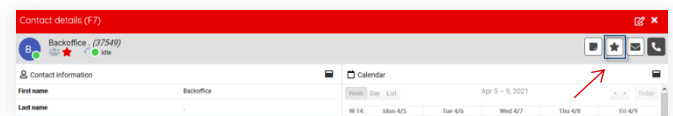


When you hover over either the presence or the hook state, you will see a corresponding tool tip:

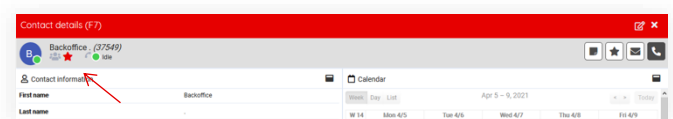


4.5 Favorites

You can mark a contact as favorite by clicking on the star in the contact details area (F7):



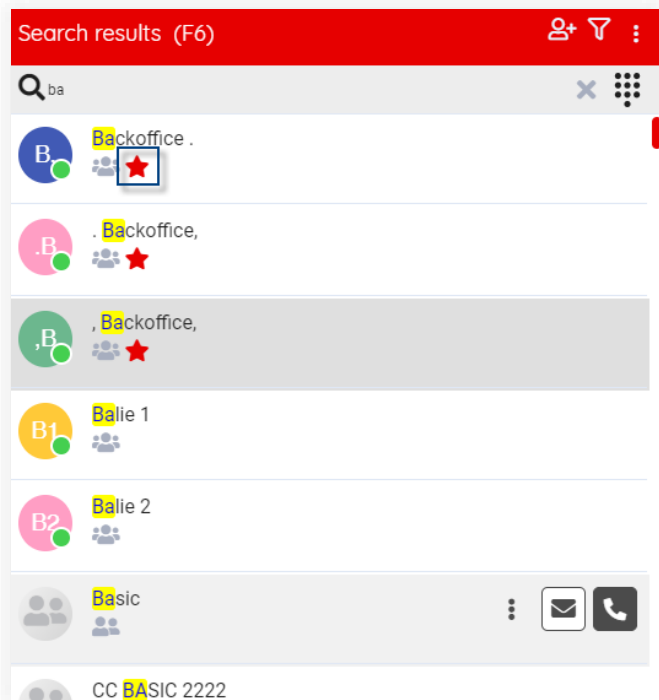
When the contact has been marked as favorite, a star will become visible:



You can click on the button again, to remove the contact from your favorites.



The contact list indicates your favorites with a star:



You can filter your contact list by favorites, see next paragraph.

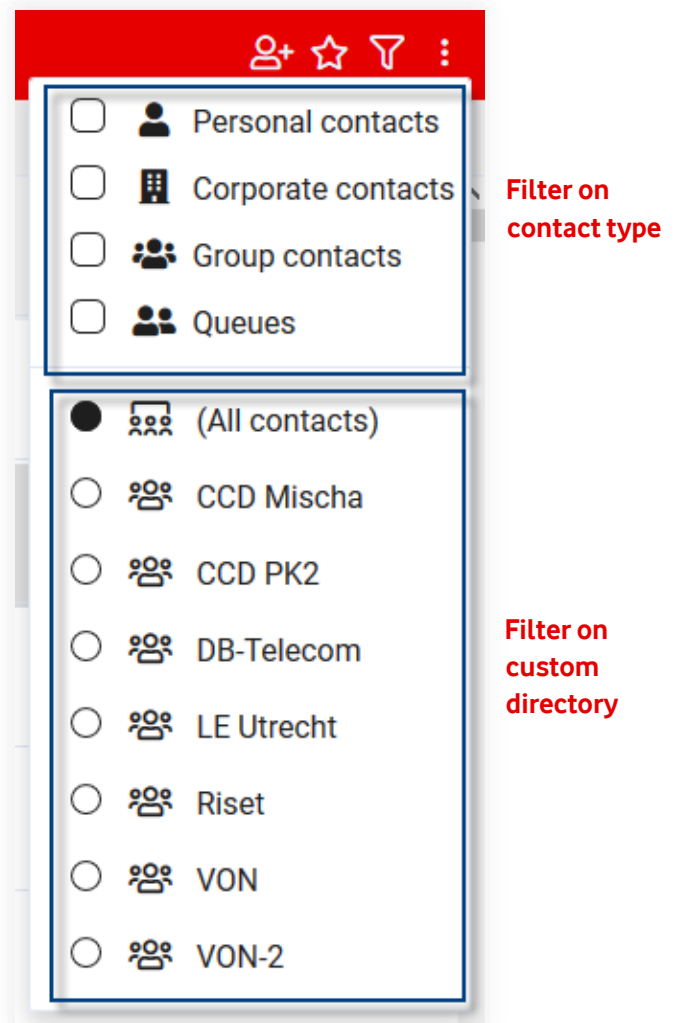
4.6 Filtering of contacts

The contact list can be filtered in various manners. This feature is only available in the Premium and Advanced edition.

When you click on 'Filter settings', you can check by which item(s) you want to filter the contact list.



The filter settings will be displayed in a drop-down menu. The filter contains two sections: contact types and custom directories.



You can filter on one of the sections. For example, if you only want to show favorites, you check the checkbox in front of 'Favorites'. Or if you only want to see Personal contacts and Queues, you check these checkboxes.

Or if you only want to see contacts that are in custom directory 'Pca', you can check this radio button.

You can also combine these sections. So you can indicate that you only want all Group contacts in custom directory 'Pca'. Or only your favorite corporate contacts.

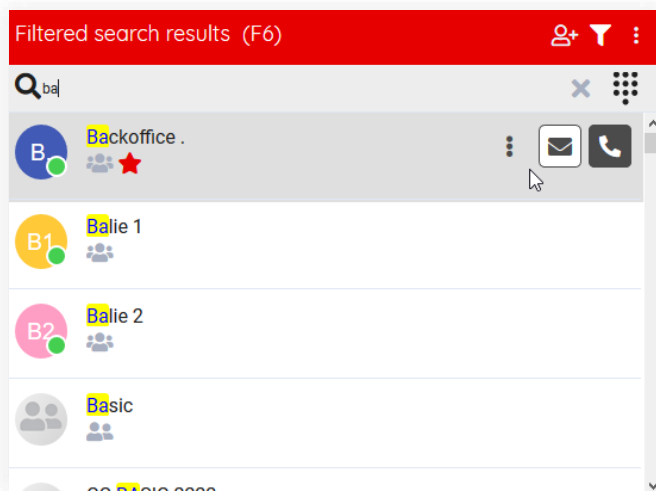


To actually filter the contact list, you have to click on 'Filter Contacts' first.





Now, the contact list is filtered by the items you have checked.

In the example below, a filter on favorites has been set.



You can turn off the filter by clicking again on 'Filter Contacts'.

When the 'Filter Contacts' icon is like this: , the filter is active.

When the 'Filter Contacts' icon is like this: , the filter is not active.

Your filter settings will be remembered between your sessions.

4.6.1 Changes in Custom directories

A custom directory is actually just a quick list of existing contacts. When contacts are added to or removed from a custom directory, it will take at least 5 minutes for the changes to have effect in the search results in the Receptionist. This is to improve the performance.

4.7 Editing contacts

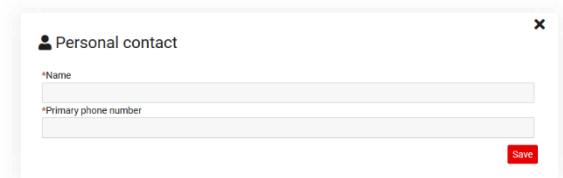
4.7.1 Adding a contact

You can add personal contacts to the contact list. The steps are:

1. Click on the 'Add personal contact' button in the title bar of F6:



2. Now, a pop-up appears in which you can enter the data of the new contact. Click on the 'Save' button to save the new contact. Click on 'X' to cancel.



Another way to add a contact is:

1. Search for a number in the search box of the contact list.



2. Click on the 'unknown number' contact in F6. Then in the Contact Detail panel, you will see a button "Add" in the contact information widget. Click on that button.

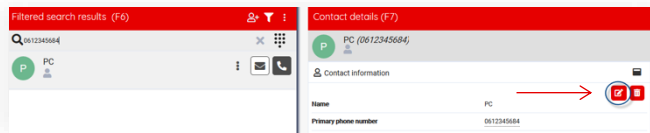


3. Then the personal contact pop-up appears, see at the beginning of this paragraph.

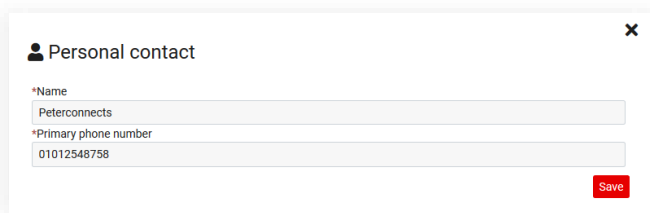


4.7.2 Editing a contact

When you want to edit a personal contact, first search for the contact via the search box in the contact list and select the contact. Then click on the button “Edit” in the Contact Information widget in F7:

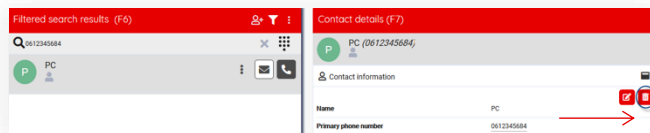


The personal contact pop-up appears. When you are ready editing the contact, click on the button ‘Save’ to save the changes or on the ‘X’ to cancel editing.

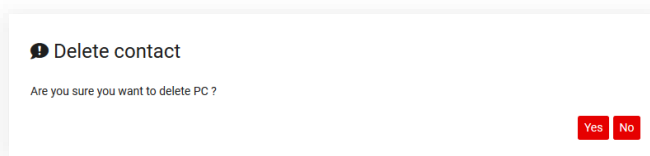


4.7.3 Deleting a contact

To delete a personal contact, first search for the contact in the search box of the contact list and select the contact. Then click on the button ‘Delete’ in the contact information widget in F7.



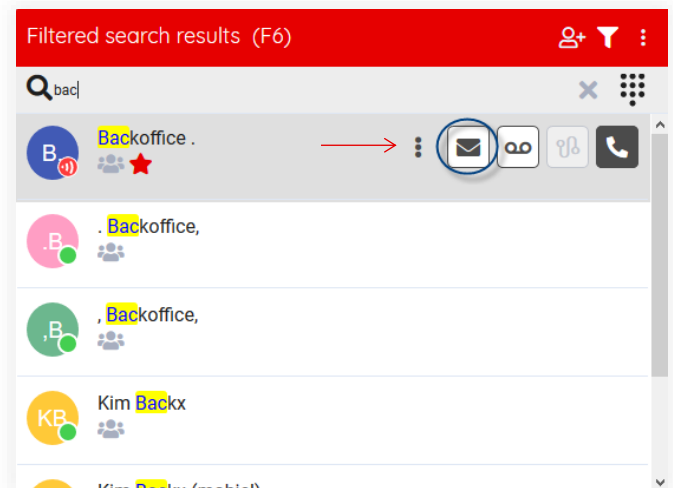
A confirmation message will be displayed, asking if you really want to delete this contact. Depending on the browser that you use, this message can look a bit different.



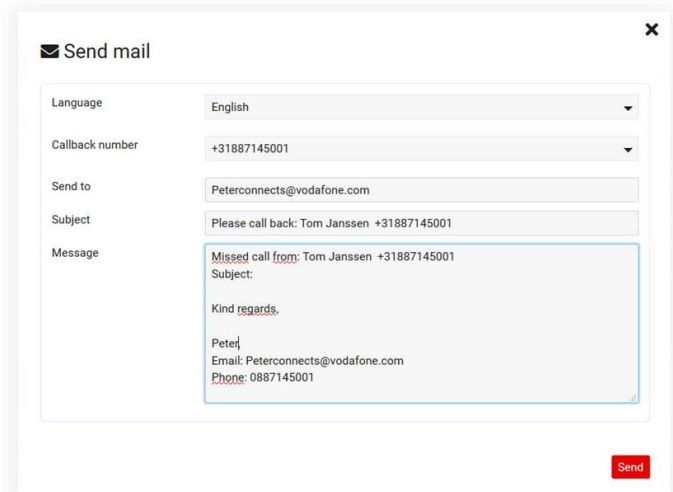
Click on “Yes” to confirm to delete the contact or click on “no” if you don’t want to delete the contact.

4.8 Sending an email to a contact

To send an email to a contact, press the email button in the contact list next to the person that you want to send the email to. This feature is only available in the Premium edition.



Then the send mail popup will be shown. Here you can enter your email.




The form contains the following fields:

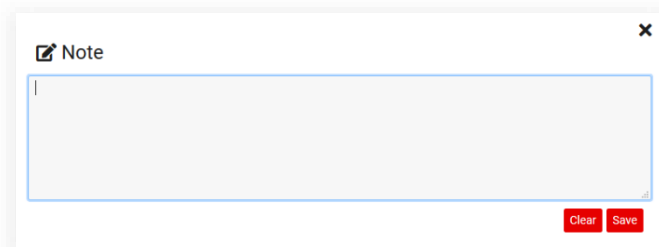
Language	There are mail templates of the languages Dutch, English, German and French. The configured user language is used as default. The language of the template can be changed in the pop-up of the email.
Send from	The email address that will be used to send this email. This field cannot be edited in the Receptionist. For changing this email address, see chapter [Global configuration]. Note that this field is not shown, when this has not been configured in the global configuration.
Send to	The email address of the contact. This field is prefilled when the email address of the contact is known. Otherwise you can enter an email address.
Subject	The subject of the mail. The subject will contain a predefined text with the data of the most recently selected call in the calls list (F2). You can change the text if needed.
Message	The content of the mail. The message will contain a predefined text with the data of the most recently selected call in the calls list (F2). You can change the text if needed.

Press button “Send” to send the mail.

To cancel the email, you can press the “X” button in the top right corner or click with your mouse outside the popup screen.

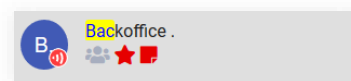
4.9 Making a contact note

If you want to make a contact note, click on the ‘Add note’ button  in F7/F3. A pop-up appears, in which the note can be written. This feature is only available in the Premium edition.




Click on ‘Save’, if you want to save the note. With the ‘Clear’ button, all text is cleared and when this is saved, the contact note is gone. Click on ‘X’, if you want to cancel adding/editing.

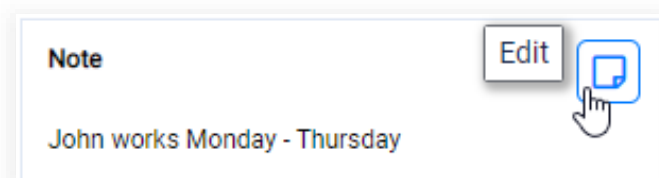
When the note is saved, in F7/F3 a sticky note icon is displayed in the contact info header.



This icon has a tooltip, that contains the first 80 characters of the contact note. Be aware that the contact note can be seen by anyone, who has access to that same contact.

The contact notes are also displayed at the bottom of the contact information widget.

Editing a contact note can be done by clicking the ‘Edit note’ button  in F7/F3. It can also be done by hovering over the contact note area (in the contact information widget or in the contact note widget) and click on the ‘Edit’ button, that appears while hovering.

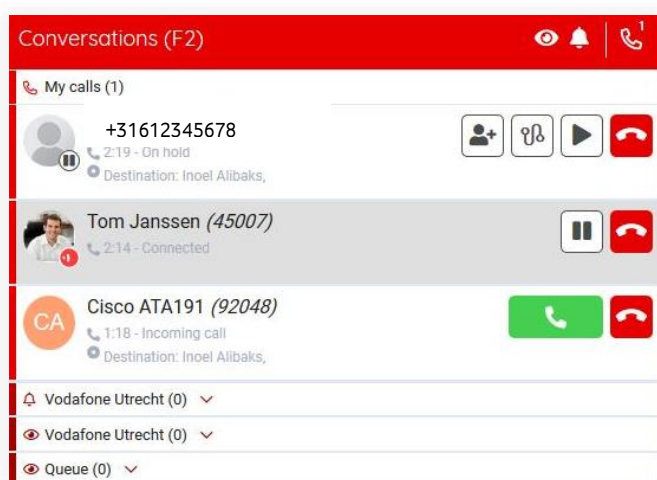


5. Call functionality

5.1 Call states, destination and call actions

In the screen below, there are three calls:

- A call on hold with +31612345678
- An active call Tom Janssen
- An incoming call Cathy Anderson



The following paragraphs describe the elements you can see in the calls in the Conversations (F2) panel.

5.1.1 Call states

The state of the calls is indicated in a small circle in the avatar of the other party.

	This is the active (connected) call
	This call is on hold
	The caller is hearing a pre-alert announcement

5.1.2 Destination information








A call can show the following information about the original destination of the call:

	Destination:	This is the destination of the call
	Fallback from:	This shows from which destination the call falls back into Conversations
	Forward (always) from:	This is shown when somebody is calling to a contact, who has set his call forwarding to you or to the queue, that you have joined/monitored. Note that the forwarding information is only shown, when the call is in the My Calls section of the Conversation panel F2. In the parentheses you can see the reason of this forwarding: <ul style="list-style-type: none"> - Always: The call is always forwarded - Busy: The call is forwarded when the agent is busy - No answer: The call is forwarded in case of no answer - Unavailable: The call is forwarded because the agent is unavailable



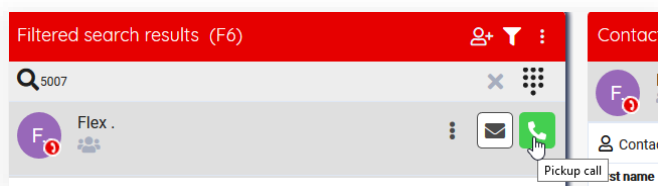
5.1.3 Call actions

Depending on the state of the call, you can perform the following actions:

	Pick up the incoming call
	Hang up the active call Decline an incoming call
	Hang up a call that is on hold
	Put the current call on hold
	Retrieve a call from hold
	Transfer the call
	Add to the current conversation

5.2 Directed call pickup

Via the contact list, you can pick up a call that has been made to one of the other colleagues. For example, when someone is calling Allison Price, and she's not at her desk, you can pick up the call here:



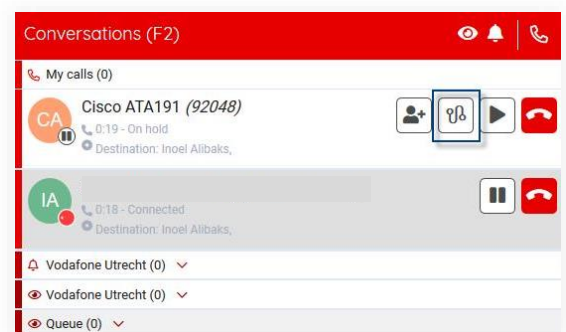
Technical note: On the telephony system, the receptionist must have the *Directed Call Pickup* service assigned.

5.3 Transferring a call

There are several ways to transfer a call.

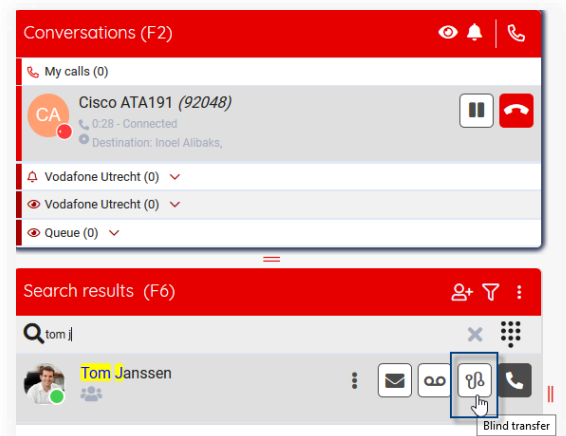
1. Transfer an active call to a hold call (announced transfer)

When you have an active call and a call on hold, you can click on the transfer button to transfer the active call to the held call:



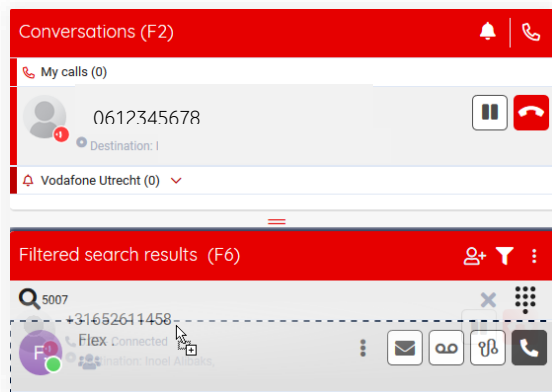
2. Transfer an active call directly to a contact (blind transfer)

When you have an active call, you can search in the contact list and transfer the call to that contact:




3. “Drag and drop” a call to a contact (blind transfer)

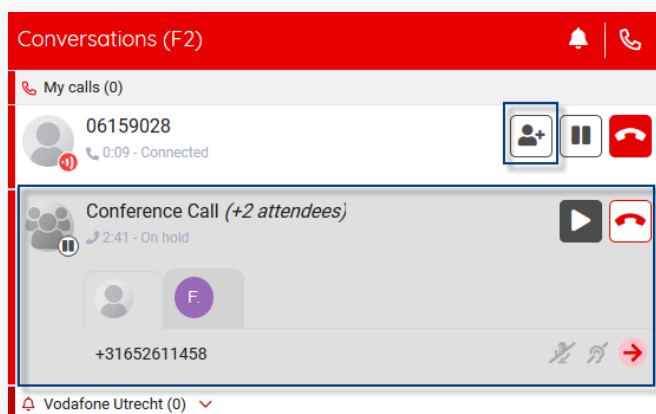
When you have an active call, you can drag that call to a person in the contact list. When dragging, you will see dotted lines where you can drop the call.




5.4 Conference calls

You can set up a conference call by clicking on the ‘Add to current conversation’  button, when there are at least 2 connected calls.

You can add a new call to a conference call by clicking on the ‘Add to current conversation’ button.



Conference calls can be identified by the ‘conference’ icon: .

A conference call has the following action buttons:



Put the conference on hold. The other members of the conference can still talk, but you will be temporarily out of the conference.



Retrieve the conference call from hold (only when it is currently on hold).



Hang up. This will end the entire conference call.

such a tab, the name of that member is displayed in

The conference call contains a small tab for every member of the conference call. When you click on the Conversation details panel (if the name of that member is available).

You can apply the following actions on any member:



Mute the conference member. This way the member can still hear the conference but cannot be heard by other members anymore.

When a conference member is muted, the icon is shown red:



Click on the icon again to unmute the member.



Deafen the conference member. This way the member cannot hear the conversation anymore. When a member is deafened, he is also automatically muted.

When a conference member is deafened, the icon is shown red:



Click on the icon again to undeafen the member.



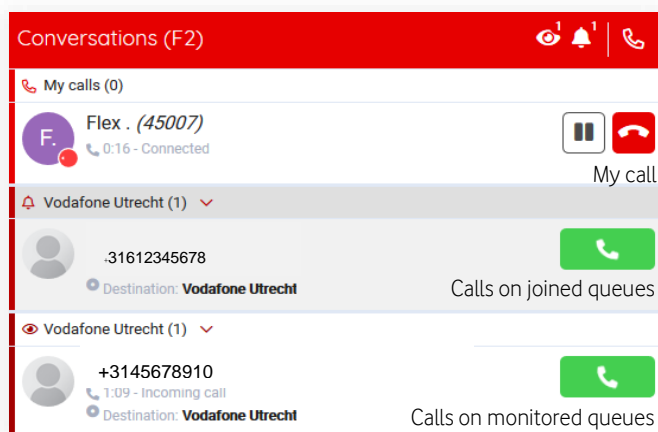


Remove the member from the conference.
This action cannot be undone.

5.5 Working with queue calls

When you have chosen to join or to monitor queues, the display of the calls will be different. Queue functionality is only available in the Premium edition.

NB: For more information about joining and monitoring queues, see the paragraph about Queue Management in chapter [Personalizing the Receptionist].



When you have selected queues to join or to monitor, the calls will be divided by headers:

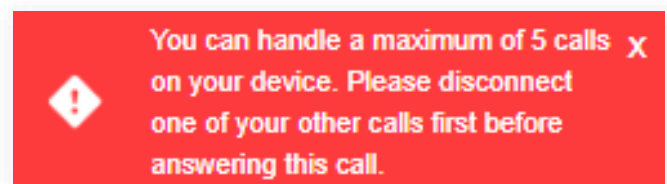
- A header named 'My calls'. These are the calls that are on your phone. (The calls that you make yourself, the calls that are directly made to you and the calls that are dispatched to you from a queue)
- A header for each joined queue
- A header for each monitored queue

5.5.1 Toggling visibility of all joined or all monitored queues

You can toggle the visibility of all joined queues simultaneously by clicking the bell icon in the F2 header.



You can toggle the visibility of all monitored queues simultaneously by clicking the eye icon in the F2 header.



When both the joined and monitored queues are toggled off, the Conversations panel will only contain your direct calls. In that case the division into my calls/joined queues/monitored queues is no longer relevant and will be turned off.

5.5.2 Toggling visibility of a single queue

The calls in each queue can be made visible/invisible by clicking on the expand/collapse arrow in the queue header.



5.5.3 Restriction in picking up queue calls

There is a limitation in picking up queue calls. One user can pick up a maximum of 5 calls concurrently. Therefore, when you try to pick up the 6th queue call, you will get a message like shown below:

5.6 Calling other numbers of a contact

The contact information widget shows all phone numbers of a contact. For example the primary phone number, the mobile number etc.

The phone numbers are underlined to indicate that they are links. When you hover over a row that contains the phone number, a small dial button will appear. When you click on this dial button, a phone call will be made to that phone number.



Contact details (F7)

Flex . (45007)
Idle

Contact information

First name	Flex
Last name	
Primary phone number	45007
Alternative phone number	+31887145007

When you click on the number itself, a pop-up will be shown, asking if you want to make a call to the specified phone number:

Contact User

Do you want to call 45007?

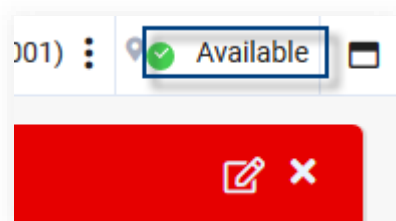
Dial

Press on 'Dial' if you want to make the call and on 'X' if you don't.

6. Receptionist status

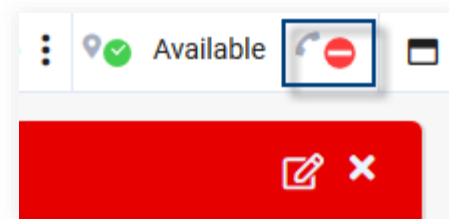
6.1 Presence

In the right top corner of the Receptionist you can see your own states. Default you will only see your presence state:



6.2 Do not disturb

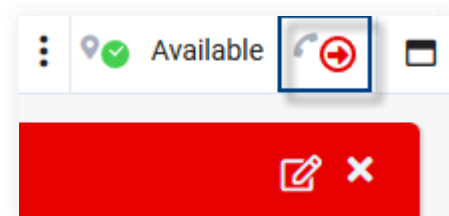
When you have "Do not disturb" switched on, it will be indicated by the do not disturb sign as follows:



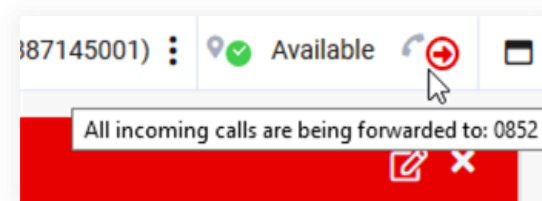
For switching the "Do not disturb" setting on or off, see the paragraph about Conversation settings in chapter [Personalizing the Receptionist].

6.3 Forward all calls

When you have "Forward all calls" switched on, it will be indicated with the forward sign as follows:



When you hover over the forward sign, it will display to which number all calls are forwarded.



For switching the "Forward all calls" setting on or off, see the paragraph about Conversation settings in chapter [Personalizing the Receptionist].

Note: When you have both "forward all calls" and "do not disturb" switched on, only the "forward all calls" state will be shown.



7. Personalizing the Receptionist

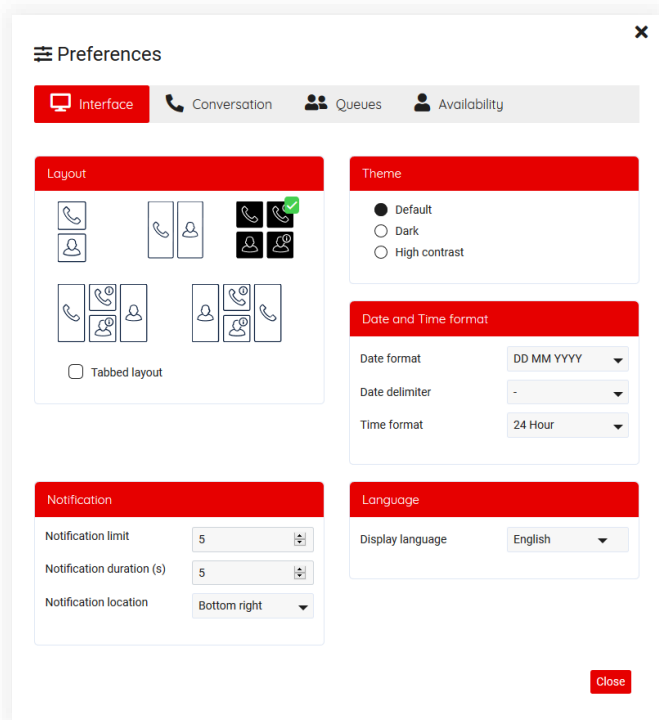
You can open the “Preferences” dialog from the menu bar:



In the preferences dialog, there are four main settings: Layout, Conversation, Queues and Profile. They will be described in the next paragraphs.

7.1 Layout preferences

In the preferences dialog, in the Layout part, you can select a layout, a theme and some notification settings:



Layout

There are currently five layouts to be chosen, ranging from one to three columns. In these layout settings, the icons mean the following:

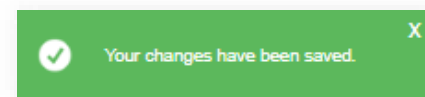
	= Conversation area (F2)
	= Conversation detail area (F3)
	= Contact list (F6)
	= Contact detail area (F7)

Theme

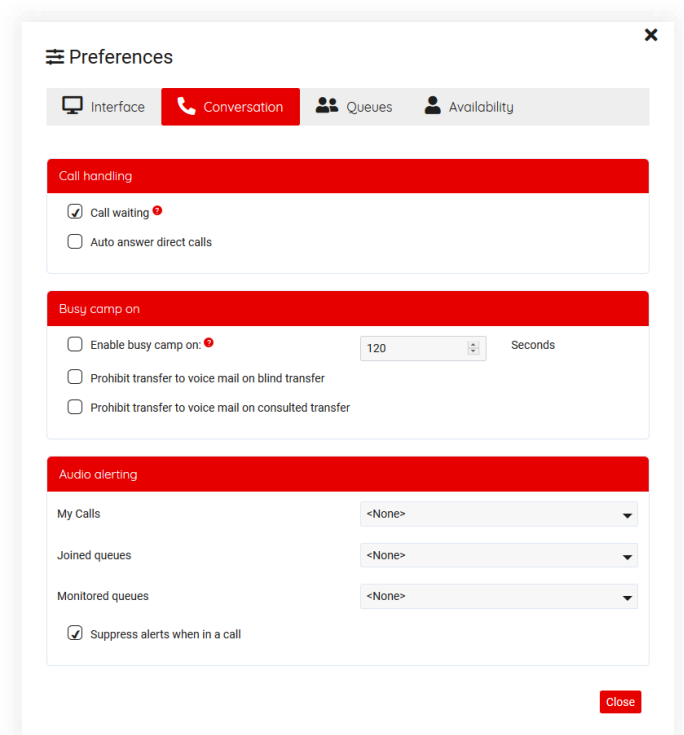
You can also select a theme: The default theme is shown from the start. The High Contrast theme can be used when you have difficulty seeing contrast.

Notification

On the bottom of this screen you can select a location for popup notification messages and how many you will get maximum at one time. A notification can look like this:



7.2 Conversation settings



On tab “Conversation” you can configure some settings, that have to do with telephone conversations. The settings are described in the following paragraphs.

7.2.1 Call handling

Call Waiting allows you to put your current call on hold to answer a different incoming call.

When you turn on ‘Auto answer direct calls’, incoming direct calls (i.e. joined queue calls and calls to the operator directly, not queue calls that not have been joined) will automatically be picked up for you. A direct call is only picked up, if you don’t have a current connected call yet. When you hang up your current connected call, the next incoming direct call will automatically be picked up.

Note that Auto Answer only works, when you are logged in into the Receptionist.

7.2.2 Do not disturb

By activating ‘do not disturb’, you can block all incoming calls. If configured, they will be forwarded to voice messaging. This feature is only available in the Premium and Advanced edition.

The ‘Ring splash’ setting is to play a notification on your phone as a reminder that “Do not disturb” has been activated.

7.2.3 Forward all calls

This setting is for automatically forwarding all calls to a specified number. This feature is only available in the Premium and Advanced edition.

The ‘Ring splash’ setting is to play a notification on your phone as a reminder that “Forward all calls” has been activated.

7.2.4 Busy camp on

This feature allows you to camp on a call to a busy destination. You can configure the time before the call will fallback. This feature is only available in the Premium and Advanced edition.

You can also indicate whether it must be prohibited to transfer to voice mail.

7.3 Queue management

Queue functionality is only available in the Premium edition.



7.3.1 Joined queues

To add a queue to join, open the drop-down box (with the arrow pointing down) and check which queues you want to join. To remove a queue, click on the X behind the queue or uncheck the queue.

You can select a maximum of 10 queues to join.

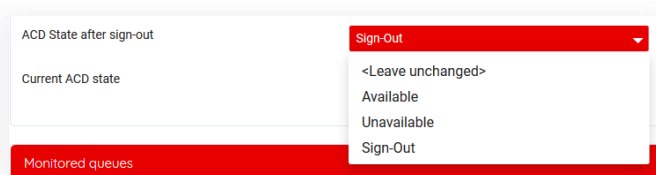
When you have selected a queue to join, phone calls on that queue will also ring directly on your phone, when it is dispatched to you.

7.3.1.1 ACD state

For the Joined queues you can set your ACD state (Automatic Call Distribution).

When you put your ACD state to 'Available', incoming calls on the joined queues will also ring on your phone.

When you put your ACD state to 'Unavailable', incoming calls on the joined queues will not ring on your phone.



Note: In case another setting was set in the BroadWorks admin module, like 'Sign out', this one is shown. However, the user can only change the ACD state into 'Available' and 'Unavailable'.

7.3.2 Queues to monitor

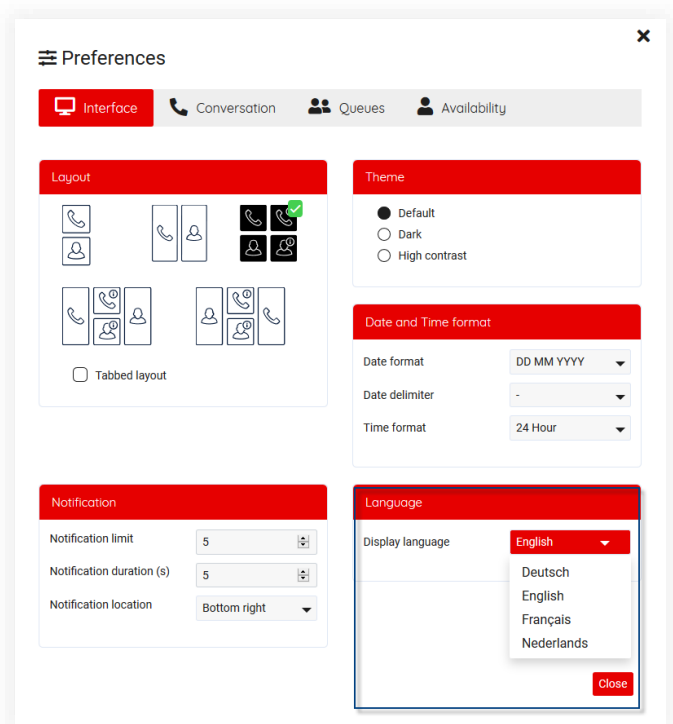
With a similar drop down as for selecting joined queues, you can also select which queues you want to monitor.



You can select a maximum of 10 queues to monitor.

Note: When you have chosen to monitor a queue, but you have not joined it, phone calls on that queue will only be visible in your Receptionist application.

7.4 Profile settings



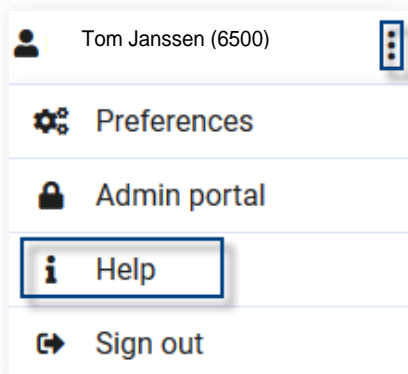
On the tab 'Interface' you can change the language.



8. Keyboard navigation

The Receptionist allows keyboard navigation via shortcut keys. This will help keyboard centric operators to operate faster.

The shortcuts are shown in the Help menu:



Help (BW2021.03) ✕

Shortcuts

User manual

Application messages

What's new

Global shortcuts

F2	Activate conversations panel
F3	Activate conversation details panel
F6	Activate contacts panel
F7	Activate contact details panel
F9	Activate Homepage panel
F4	Put current conversation on hold
Alt + P	Add personal contact
Alt + R	Show most recently used
Alt + V	Show favorites
Alt + L	Turn filter on or off

Shortcuts for conversations panel (F2)

→	Show conversation details in F3 / Show queue calls
←	Hide queue calls
↑	Select previous conversation
↓	Select next conversation
Enter	Pickup conversation / Retrieve call from hold
Ctrl + Enter	Transfer
Delete	Hang up

Shortcuts for conversation details panel (F3)

Enter	Pickup conversation / Retrieve call from hold
Delete	Hang up

Shortcuts for contacts panel (F6)

Ctrl + →	Show contact details in F7
→	Show contact details in F7 (with one column in F6)
→	Move to the right in the contact list (with multiple columns in F6)
←	Move to the left in the contact list
↑	Move up in the contact list
↓	Move down in the contact list
Enter	Dial or pickup
Escape	Cancel search
Ctrl + Enter	Blind transfer
Ctrl + E	Send mail to selected contact

Shortcuts for contact details panel (F7)

Enter	Dial or pickup
Ctrl + E	Send mail to selected contact


Close

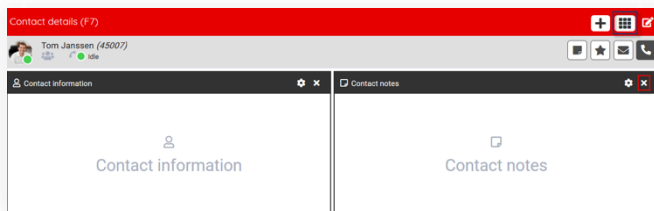


9. Widgets


The detail areas of the Receptionist (and the homepage as well) contains widgets. These are small application parts that operate on either the currently selected conversation or the currently selected contact.

9.1 Moving the widgets around


When you want to change the layout of the widgets, you can click on the 'Edit widgets'  button. The widgets become editable and you can drag and drop them and resize them. The widgets are positioned on a grid that becomes visible when dragging / resizing:



The widgets will automatically snap to the closest line on the grid. You can give the widgets any size and position.

You can automatically organize the widgets again by clicking on the 'Arrange widgets'  button.

You can remove a widget by clicking on the 'X' (Remove widget) in the title bar of the widget.

You can stop editing the widget by clicking on the 'Stop editing'  button.

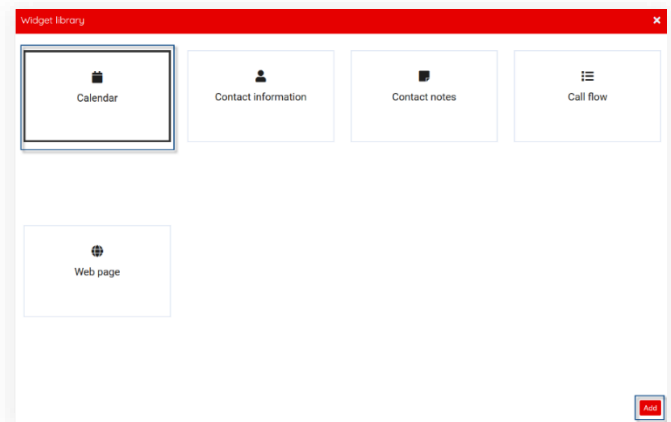
9.2 Adding a widget

When you go to the edit modus of the widgets, you can click on the button 'Add a widget'

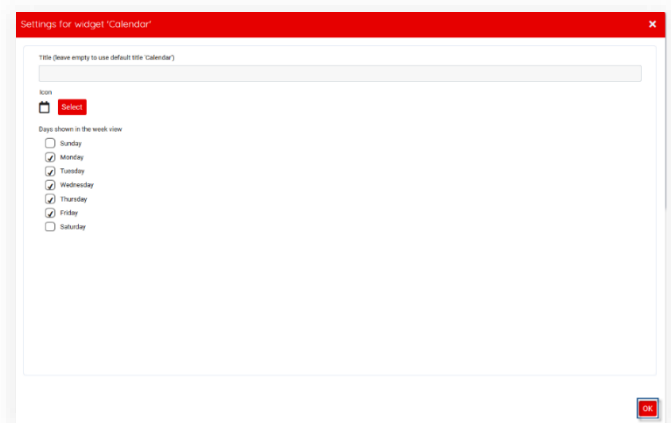


Then the widget library will be shown where you can select a widget:

Note: The actual widgets that are available to you might be different than the ones displayed below. This image is just for demo purposes.



Select a widget and click on the button "Add". After adding a widget, you can configure it in the next step:

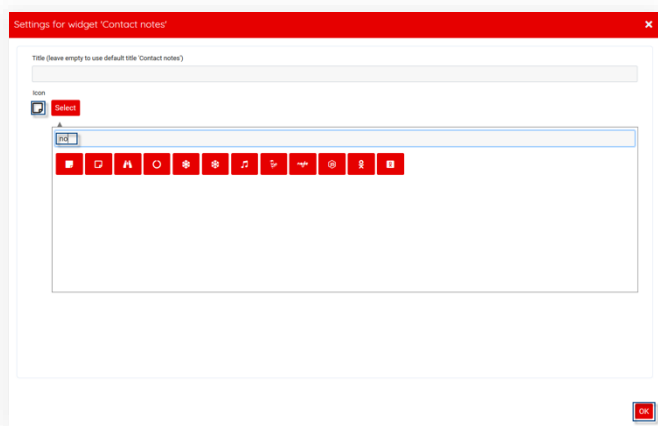


At least you can edit the title and the icon. Some widgets require more configuration. Those will be described in the next paragraph.

If you want to change the icon, you can click on the icon to show the icon selector. Then you can search for a specific icon, for example 'note'.

The icon search is only available in English, because the icons are coming from a public library named 'Font Awesome'.



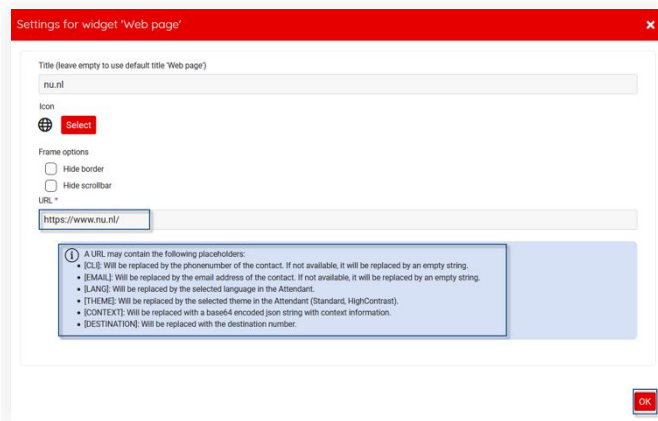


9.3 Specific widgets

9.3.1 Web page widget

By inserting a Web Page widget, you can embed an external website into the Receptionist. For example, a page of a corporate website. This feature is only available in the Premium edition.


When inserting the Web Page widget, you can enter a URL to the page to embed:



Technical notes:

- The URL is mandatory and needs to contain 'http(s)://'
- The URL can contain the placeholders [EMAIL] and [LANG]. The placeholders are described in paragraph "URL placeholders for widgets" at the end of this chapter.

- Not all websites can be run in the web page widget, which is actually a <iframe> element. Not all websites allow this. Some websites have an X-frame-options set to any of the following values:
 - **deny:** The website is not allowed to run in an <iframe>.
 - **sameorigin:** The website can only be run in an <iframe> when they both have the same origin (domain)
 - **allow-from <uri>:** The website is only allowed to be run in an <iframe> by a website that is run from a specific uri.

The web page that is shown in the widget can be opened in a new window, using the  button

9.3.2 URL placeholders for widgets

Widgets that need a URL can have placeholders. These placeholders will be used by the Receptionist to provide the target data provider with extra request data. The placeholders are:

[CL]	This placeholder stands for "Calling Line Identification". This is the phone number of the person that is calling.
[EMAIL]	The receptionist uses this tag as placeholder for the email-address of the currently selected person. For example, if a call is selected and the email address of the calling person is known, the email placeholder will be filled with that email address. If the email address is not available, an empty string will be used.



[LANG]	This tag will be placeholder for the currently selected language in the receptionist. The following placeholders are provided: en = English fa = French, nl = Dutch, de = German
[THEME]	(Only for the Webpage widget). This placeholder will be replaced with the name of the current theme. (Standard, HighContrast)

9.4 Overview of all widgets

Calendar

This widget shows the calendar information for a contact, when the calendar has been configured by your administrator. This widget is only available in the Premium edition.

Contact information

This widget shows the basic contact information for the selected contact. Note that for contacts from the Broadworks Receptionist, "extension" is displayed as "primary phone number" in the widget and "number" as "alternative phone number". When there is no extension, the number is displayed as primary phone number in the widget.

Contact notes

With this widget, you can read and edit contact notes. Be aware that the contact note can be seen by anyone who has access to the same contact. This widget is only available in the Premium edition.

My call history

This widget shows the calls that you have received, including missed calls.

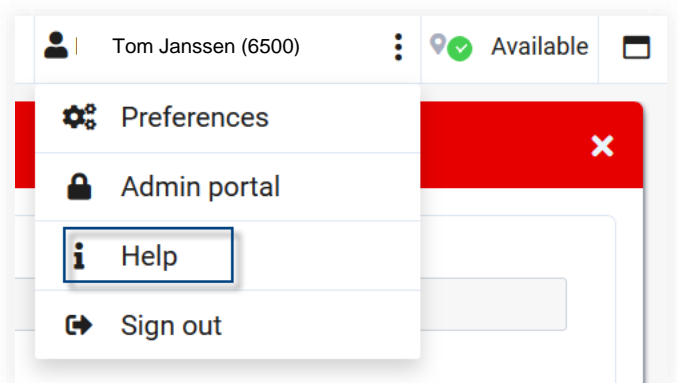
Web page

This widget will display a custom website with information about the currently selected contact. This widget is only available in the Premium edition.

Startup

This widget is shown on the homepage screen, when the Receptionist is just started up.

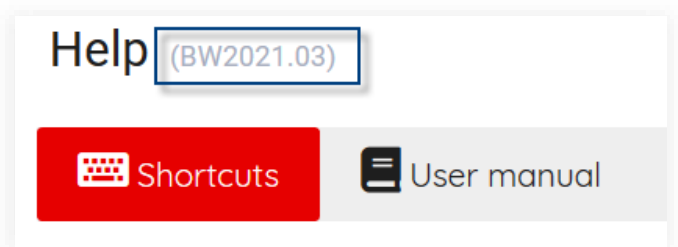
10. Help function



Via the main menu you can open the Help popup:

10.1 Receptionist version

In the title of the Help popup, the current version of the Receptionist is mentioned.



10.2 Keyboard shortcuts

The first tab page of the Help menu describes the keyboard shortcuts, as described in the chapter about Keyboard navigation.

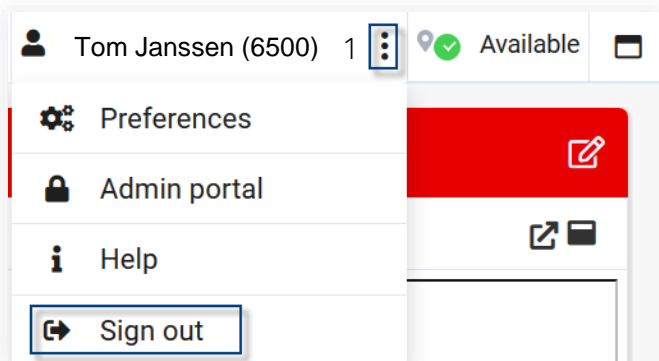
10.3 User Manual

On the second tab page of the Help menu you can download the user manual.



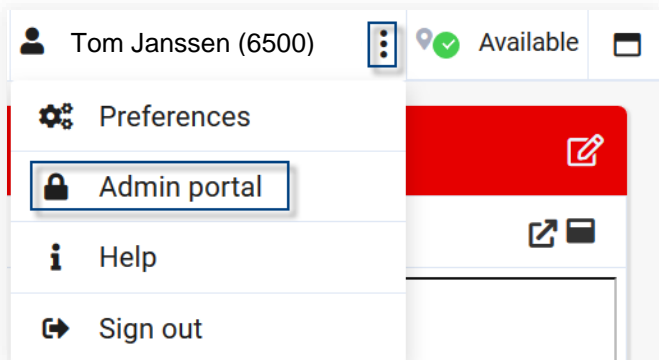
11. Sign out

When you open the main menu (1), there is a menu item to sign out (2). If you click this item, you will be logged out of the Receptionist. You will not be asked for a confirmation.



12. Global configuration

If you are permitted to edit the global configuration, you can go to the Admin Portal via the main menu:



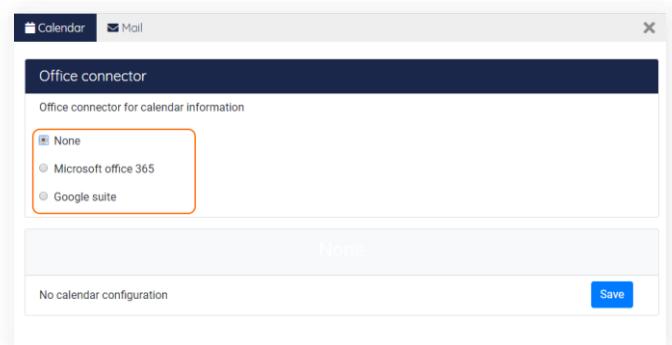
In the Admin portal, you can enter some central configuration for the application. This configuration applies to all users of the Receptionist. The following paragraphs describe the configuration, that can be made. The admin portal is general and therefore in PeterConnects branding (color blue).

12.1 Calendar

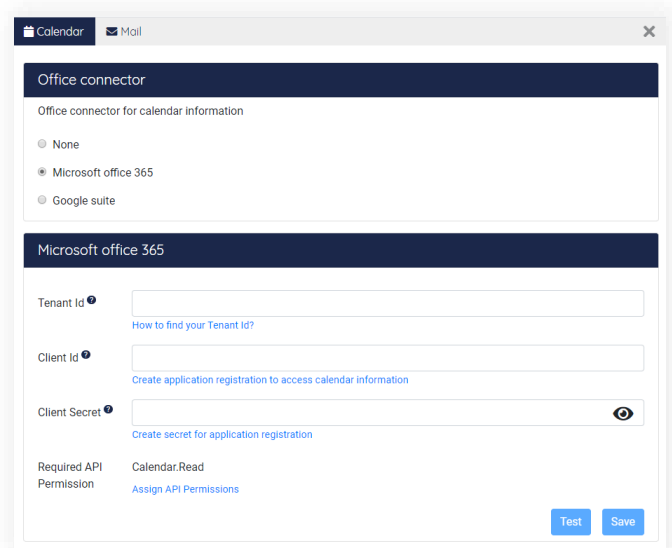
The Receptionist contains a calendar widget, that displays the calendar of the selected contact.

This widget needs some central configuration before it can fetch the data of the calendar. That configuration is done in the Admin portal on the Calendar page.

The screen shows a selection of which kind of calendar connector you want to use. 'None' is selected by default. The other options are 'Microsoft Office 365' and 'Google Suite'. These are described in the next paragraphs.



12.1.1 Microsoft Office 365



In this screen you can setup a connector for Microsoft Office 365. You can fill in the Tenant Id, Client Id and Client Secret. The field Required API Permission has already been filled in, because this is always the same.

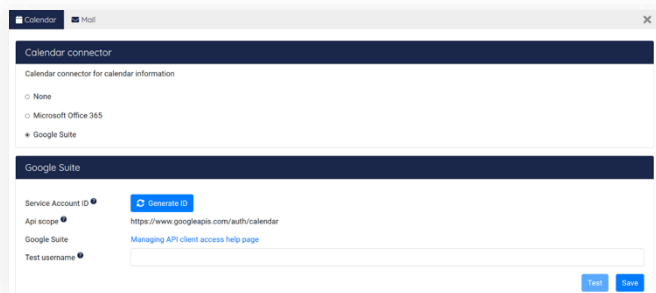


For more information about these fields, you can click on the blue links below the fields. They will open a website in a new tab, containing information on how to configure those fields.

These pages are publicly available websites that are not owned by the maker or the supplier of the Receptionist. Therefore, we cannot guarantee that these links will always be available.

When you have entered all data, you can click on the button “Test” to check if the settings you entered are correct. Then you can press the button “Save” to store those settings.

12.1.2 Google Suite



In this screen you can setup a connector for Google Suite.

First you have to generate the Service Account ID by a click on the “Generate ID” button. This generates your unique “Service Account ID”, which you have to enter in your Google Suite.

The field “Api scope” has already been filled in for you. This is always the same.

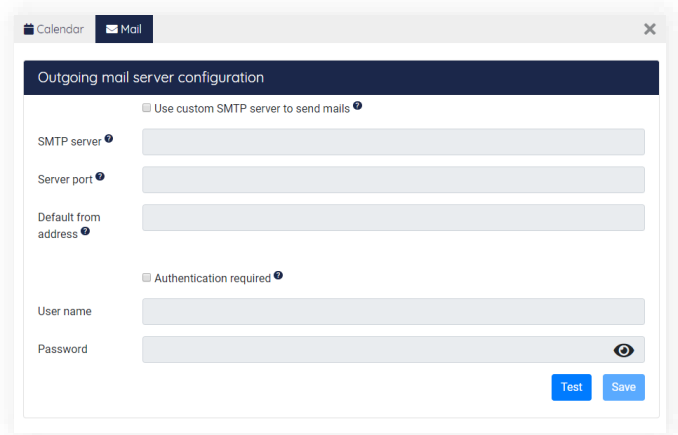
The field “Google suite” contains a link that will open a webpage that contains information about connecting to the Google Suite from other applications. It will be opened in a new tab.

In order to test the configuration, you have to fill in a “Test username”, which has to be a valid email address from your Google Suite. When you click on the button “Test”, the configuration is tested. Then you can press the button “Save” to store those settings.

12.2 Mail

In the Receptionist, the user can send a message to one of the contacts, for example to leave messages that there was a call for that contact. This functionality works with a default setting.

You can customize this to work with your SMTP server by configuring this in the Admin portal. This can be done on the tab Mail.



The following settings can be made:

- **Use custom SMTP server to send mails:** When this checkbox is checked, the configured settings will be used for sending mail.
- **SMTP server:** The name of the SMTP server that should send the mail.
- **Server port:** The port number of the SMTP server.
- **Default from address:** The email address that will be used for sending the emails, if the email address of the Receptionist user has not been configured.
- **Authentication required:** If the SMTP server requires authentication, you can check this checkbox to enable the fields where you can enter the credentials.
- **Username:** The username that will be used for sending mail via the configured SMTP server.





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