PeterConnects

Receptionist User Manual

v1.16

Oct 2024

Contents

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.

Vodafone One Net does not support the following functionality in the below chapters.

Chapter 2.1 Microsoft sign in, this is not applicable because Vodafone One Net does not support Peter Connects with Microsoft Teams plug in.

Chapter 12 Global Configuration is not supported by Vodafone One Net for Peter Connects users. The global configuration part is responsibility of your own IT configuration for email & agenda.

2 Sign in page

When you use the browser to navigate to the receptionist (the URL will be provided by your administrator), you will be redirected to a sign in page.

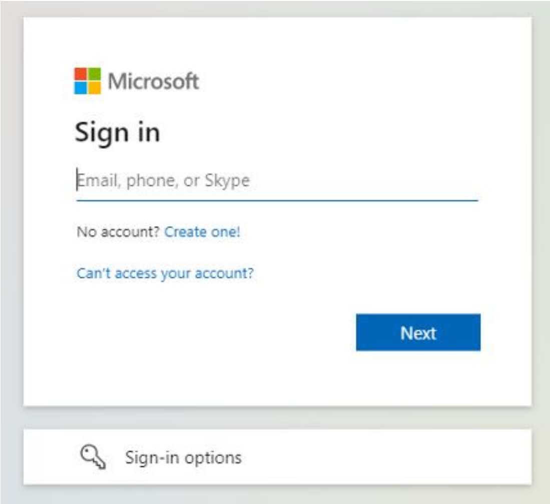
There are three possible sign in flows, depending on your version of the receptionist:

1. Version with Microsoft sign in
2. Version with Webex sign in
3. Version with Receptionist sign in

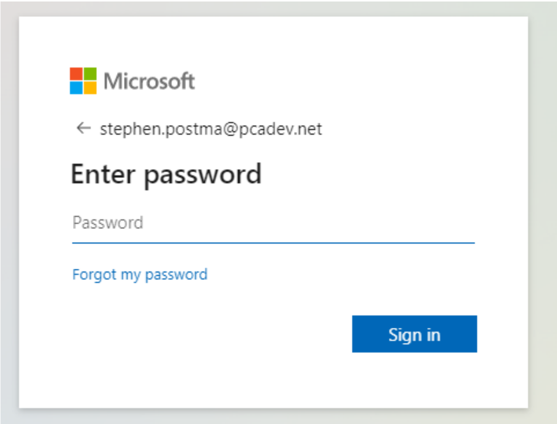
2.1 Microsoft sign in

The standard Microsoft sign in window will be displayed.

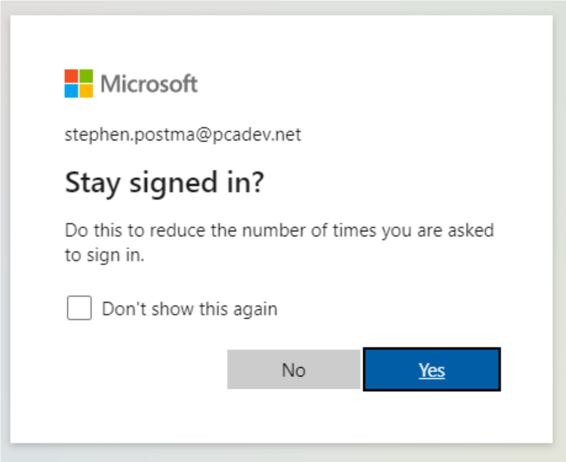
First enter your Microsoft credentials: username



Next step is entering the password:



Last Microsoft sign in step is this, select whatever you feel is appropriate.



Now you are correctly signed in with your Microsoft account.

The second sign in you need to do (only one time) is described in section 2.3: Receptionist sign in.

On subsequent logins, you will not be asked for this second set of credentials anymore, only for your Microsoft credentials.

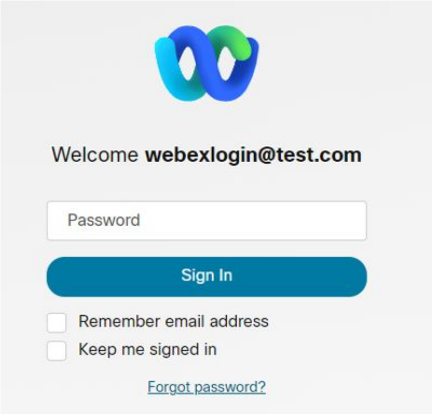
After providing the correct credentials you will be signed in into the Receptionist.

2.2 Webex sign in

The standard Webex sign in window will be displayed.

First enter your Webex credentials: Email address

Next step is entering the password:



Now you are correctly signed in with your Webex account.

The second sign in you need to do (only one time) is described in section 2.3: Receptionist login.

On subsequent sign in, you will not be asked for this second set of credentials anymore, only for your Microsoft credentials.

After providing the correct credentials you will be signed in into the Receptionist.

2.3 Receptionist sign in

Here you can enter your Receptionist credentials and click ‘Sign in’.

If you have forgotten your password, you can click on the link ‘Forgot password?’ below the sign in form. You will be redirected to a webpage where you can reset your password. Note that this link is only visible when your provider has made this feature available.

If you want your username to be remembered the next time you sign in, you can check ‘Remember username’.

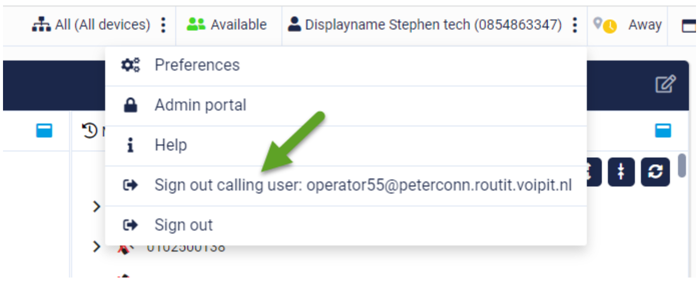
A specific error code is shown when the sign in fails. An example of such an error is:

This error code can be communicated to the administrator for support.

2.4 Change Receptionist sign in

It is possible to change the connected Receptionist sign in. This is useful when the Microsoft or Webex sign in needs to be connected to another Receptionist account (calling user).

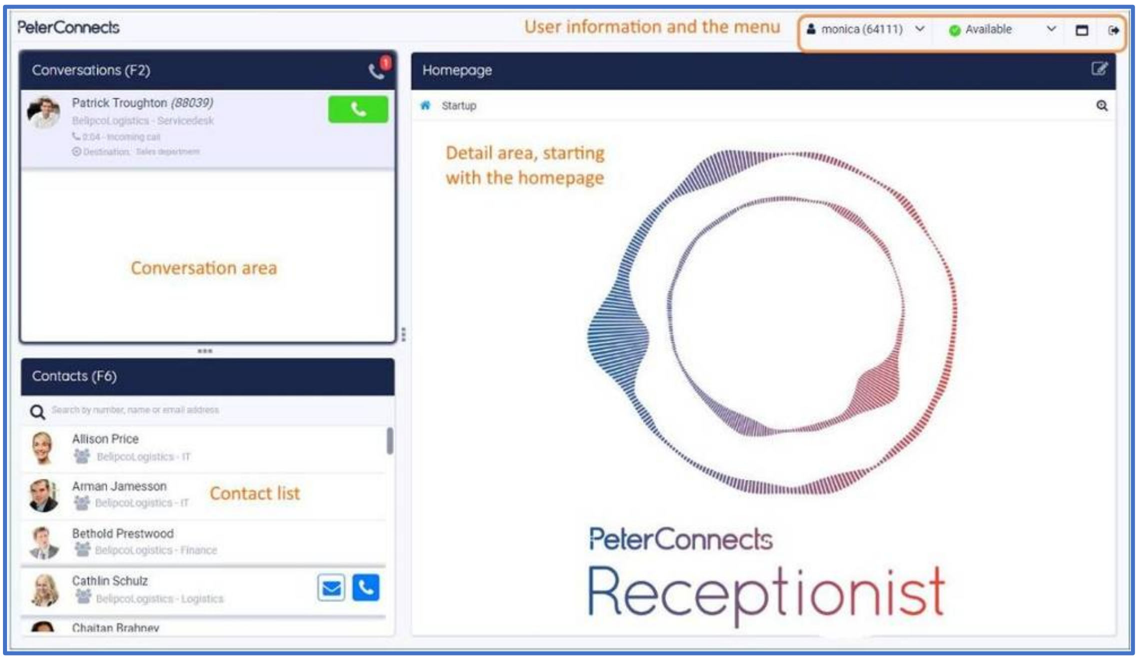
For this use the option ‘Sign out calling user’ in the Menu.



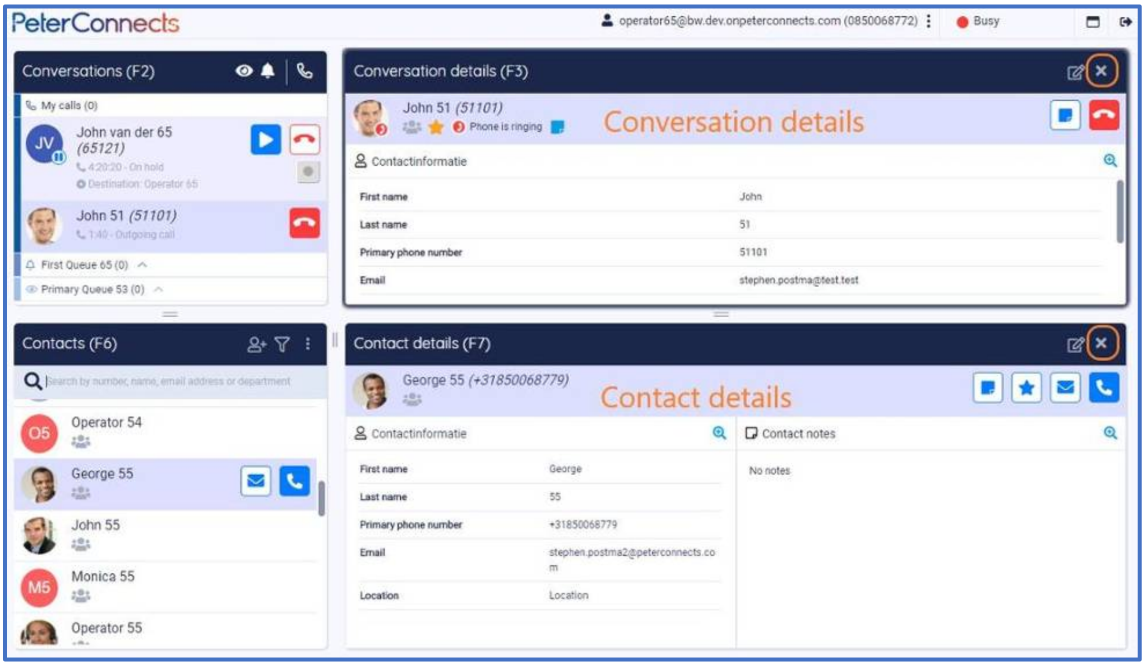
Next time when you sign in with your Microsoft or Webex credentials, the sign in screen for the Receptionist sign in is shown again.

3 The Receptionist main screen

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



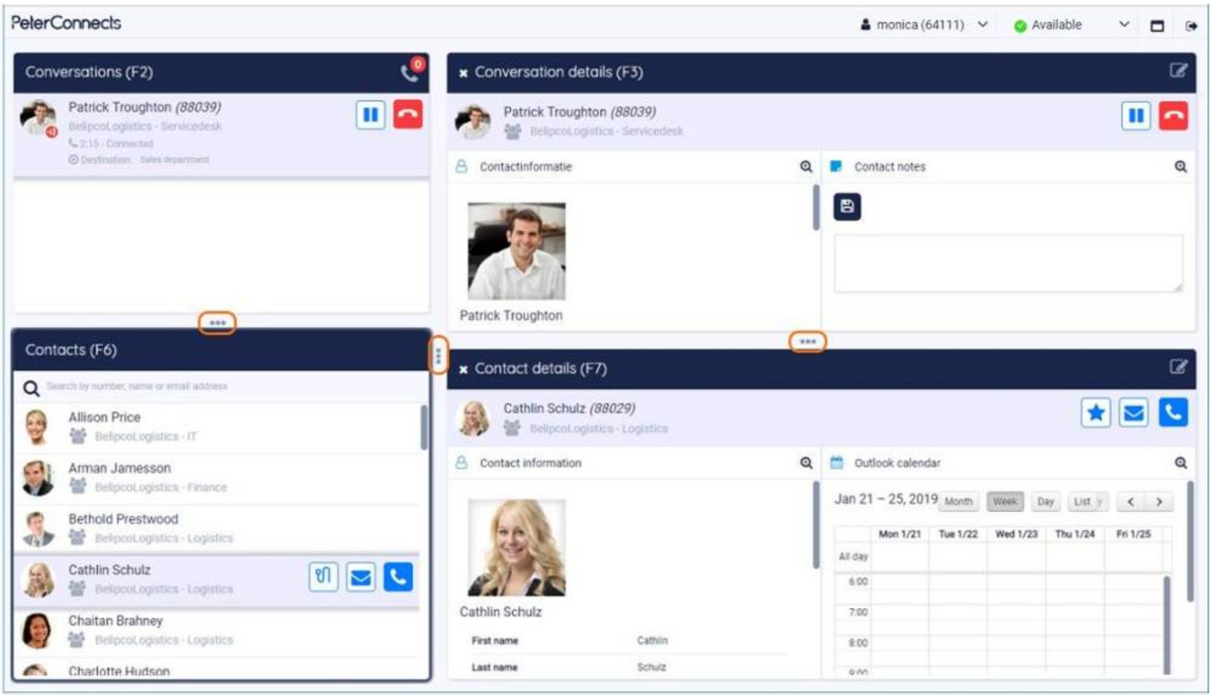
When you click on a conversation in F2, the details of that conversation will be shown in the F3 screen (Conversation details). Clicking on the 'X' will close this screen.
When you click on a contact in the contact list (F6), the details of that contact will be shown in the F7 screen (Contact details). 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 each panel to the desired size by dragging the ‘splitters’ (marked orange below):

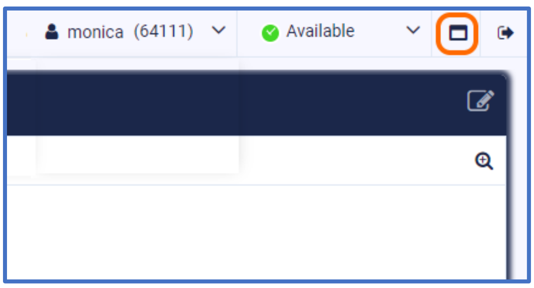


When the panels F2, F3, F6 or F7 have been made so small, that the buttons don't have sufficient space, the buttons will have a drop-down menu. To see the other buttons, click on the drop-down menu.

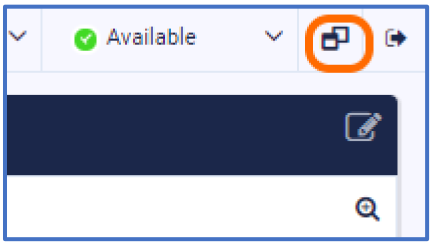
The positions of the splitters will be remembered between sessions.
The settings are stored on the Anywhere365 server, so you will have the settings available on other devices as well.

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:



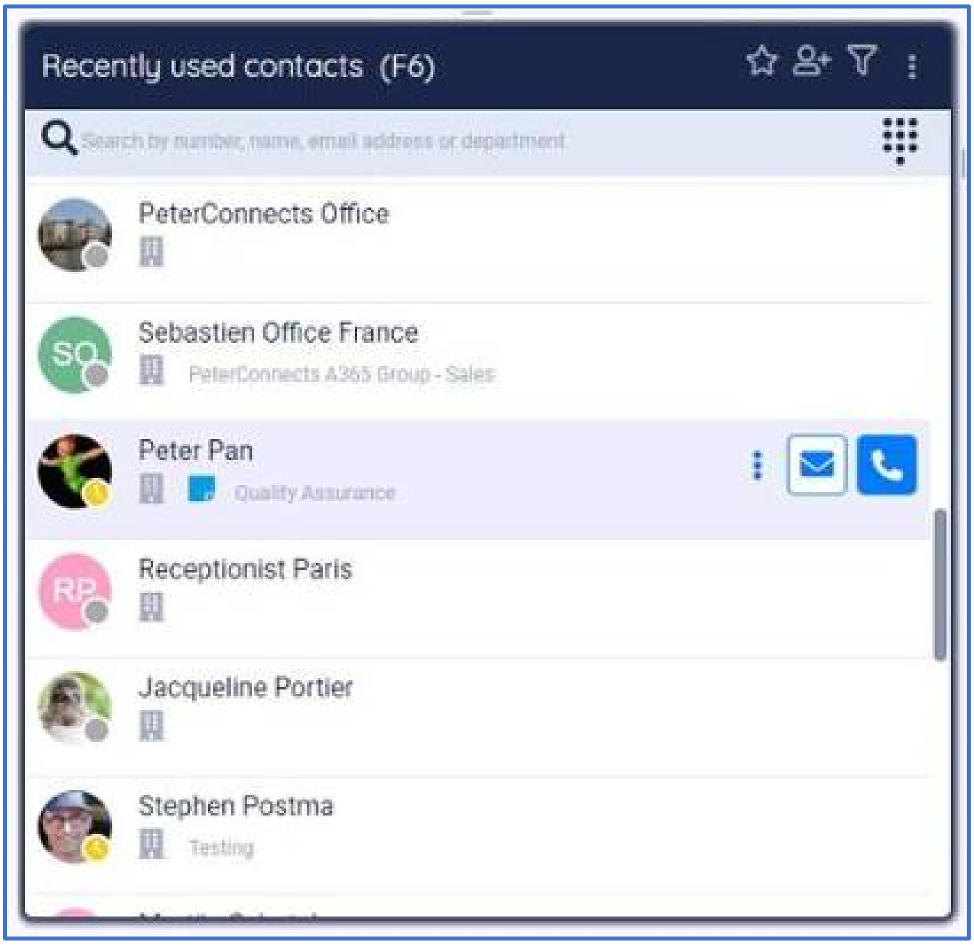
4 The contact list

In the contact list you can search for contacts, filter contacts and perform actions on the contacts that you have found.

4.1 View modes in the contact list

4.1.1 Default mode: Recently used contacts

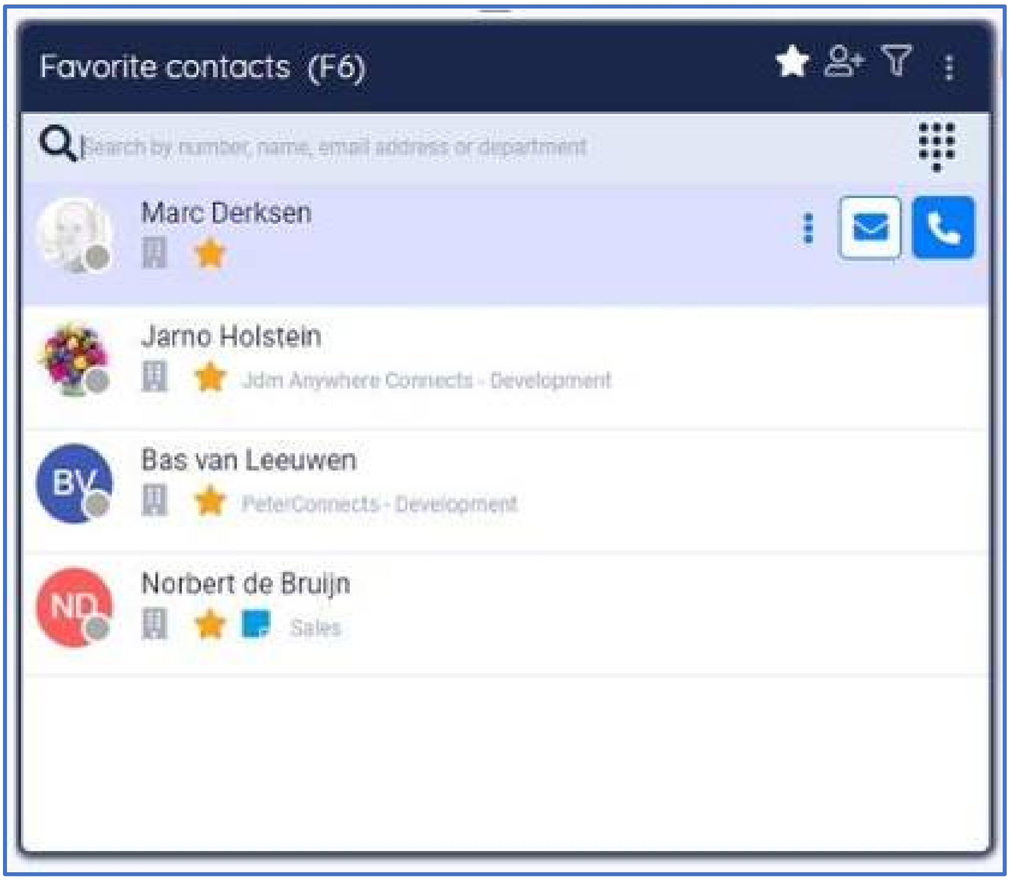
By default the contact list will show the most recently used contacts. When a contact is used (i.e. a call has been made to that contact and that call has ended, or a transfer to that contact has been done, or a mail has been sent to that contact, or a contact note has been saved for that contact) the contact is moved to the top position of the contact list.



4.1.2 Favorites mode

When you click on the star icon in the title bar of the contact list, you will switch to the favorites mode. In this mode, you only see the contacts that you marked as favorite.

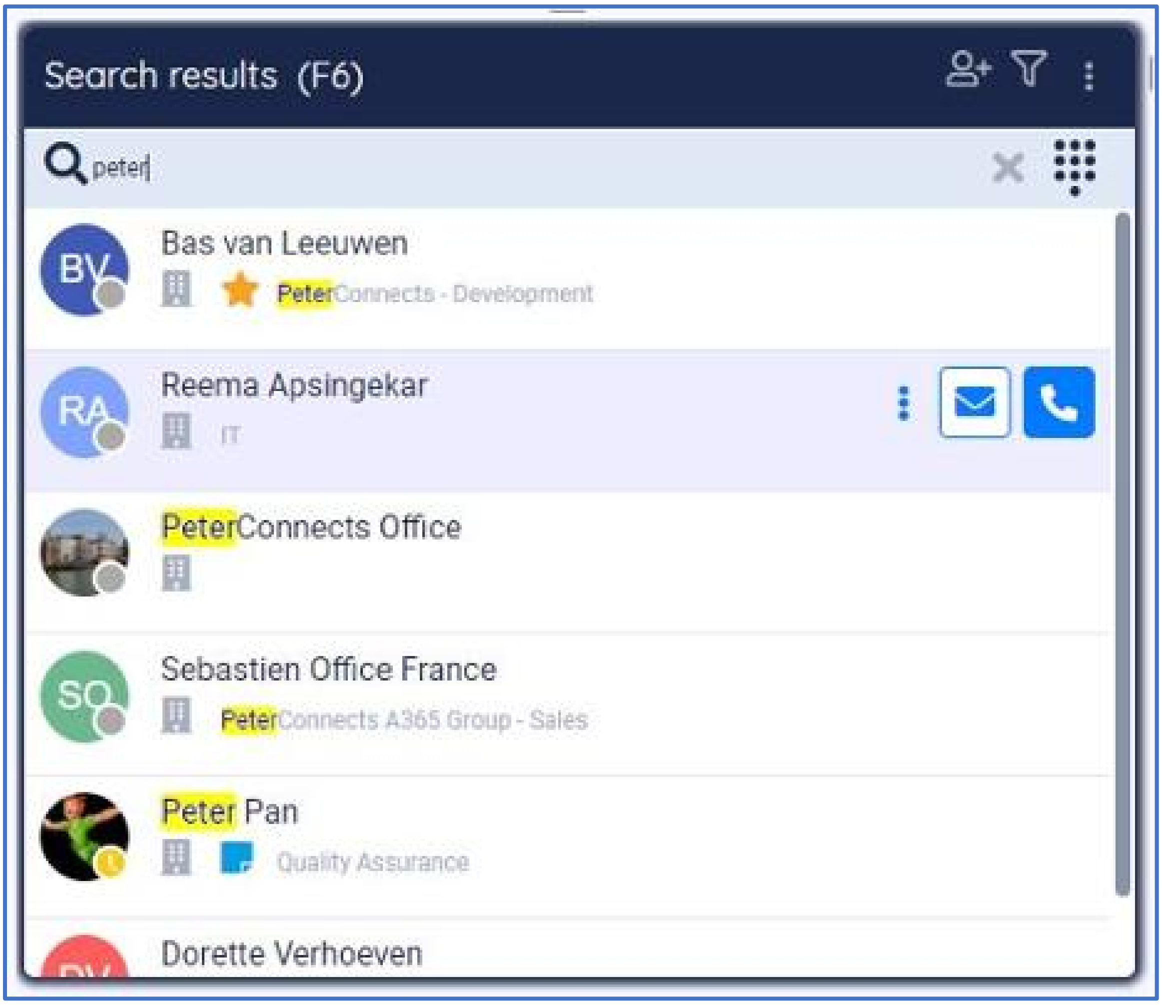
For information about adding, removing and sorting favorites, see paragraph “Favorites”.



4.1.3 Search mode

Whenever you type in a search term in the search box, or when you filter your contacts via the filter menu, the contact list will switch automatically to the search mode. In that mode the contact list will only show contacts that match your search query or your filter.

Tip: when search has completed, pressing ENTER will dial the top-most search result.

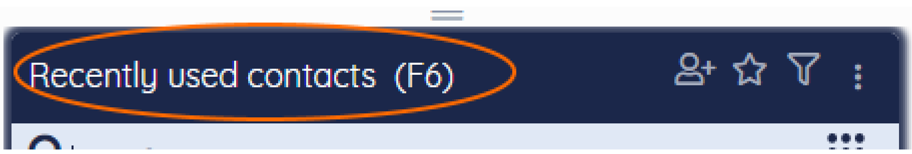


When you turn off the filter and clear the search box, the contact list will return to the previous mode.

4.1.4 Title bar text depending on the mode

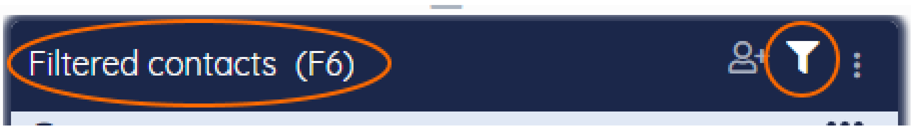
The title bar will show in text which mode you currently are working in:

When no filter is on and favorites are not set, the recently used contacts are shown, with the most recently used ones on top of the list:

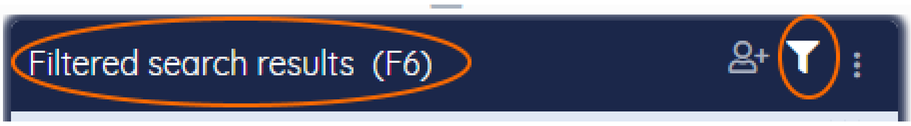


When the ‘Show favorites’ button has been clicked, the favorite contacts are shown:

When a filter has been set, the filtered contacts are shown:



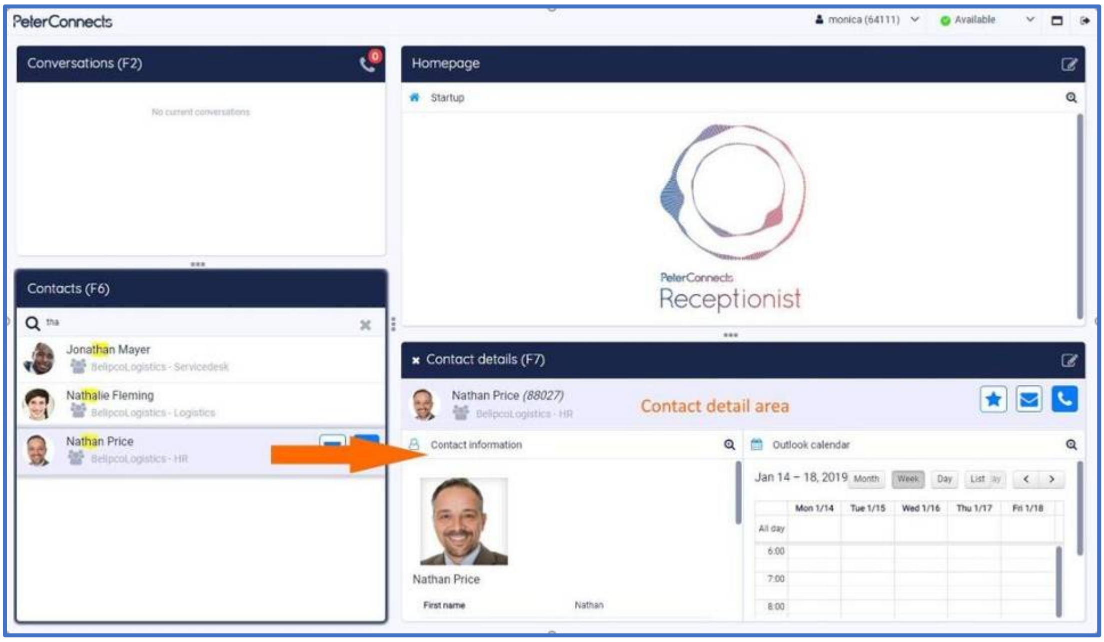
This title is shown, when you are searching for a contact, while a filter has been set:



This title is shown, when you are searching for a contact, while no filter has been set:

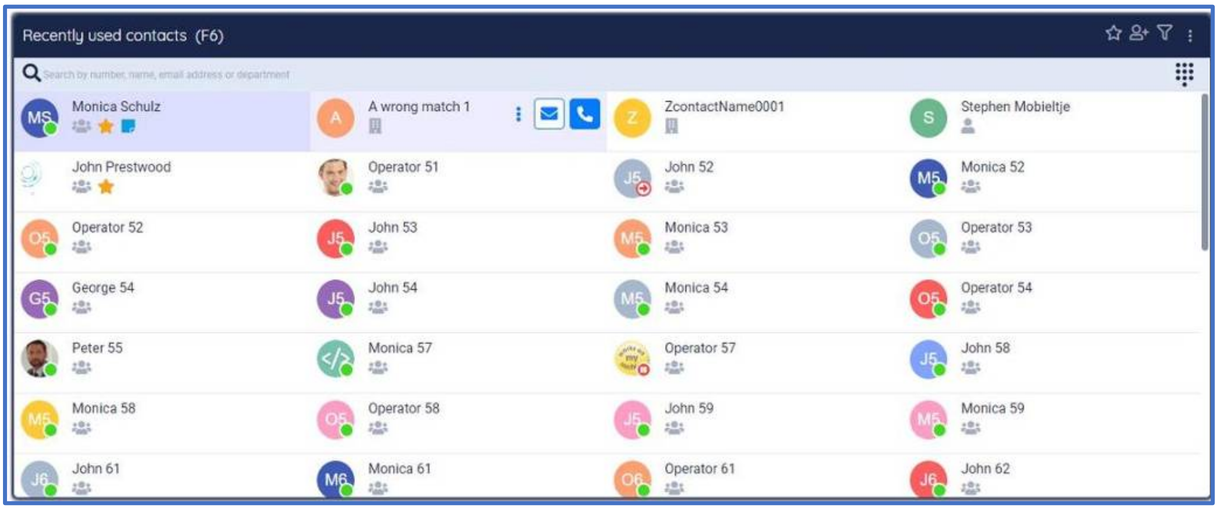
4.2 Viewing the details of a contact

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



4.3 Multiple columns

The contact list supports multiple columns. When you drag the border of the contact list and increase the width, more columns will be displayed.



4.4 Contact types

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.

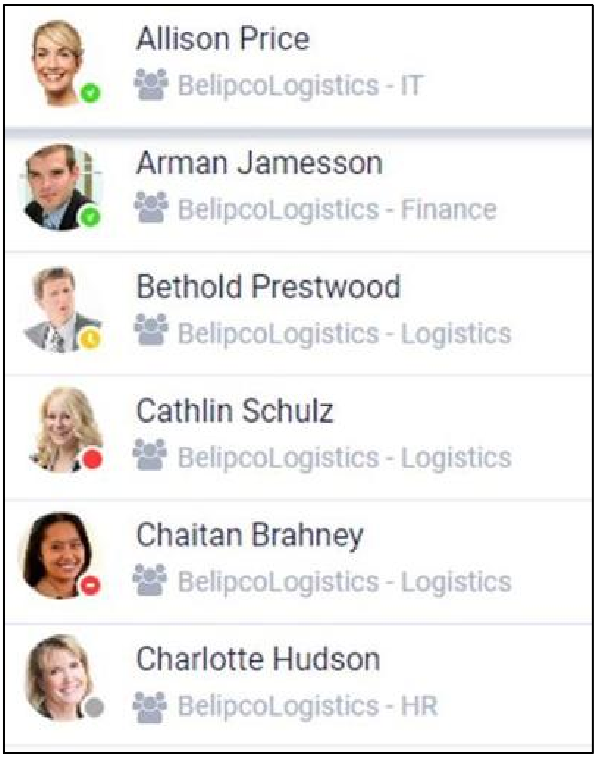
 Queue. This is not a real contact, but a queue to which you can transfer calls.

4.5 Queues

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

4.6 Presence

When the application is configured to show a contact’s presence state, then the contact list might look like this:



Depending on the type of telephony system your company uses, the presence state may appear slightly differently. The colors however will remain the same. They are:

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

Hovering over the presence state indicator with your pointer will show the presence state in text. The presence state is also shown in Conversation details panel (F3) and in the Contact details panel (F7), see the next paragraph.

4.7 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:

4.8 Actions in the contact list

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).

 Add or edit the note for the selected contact

 Add the selected contact to or remove the selected contact from your list of favorites

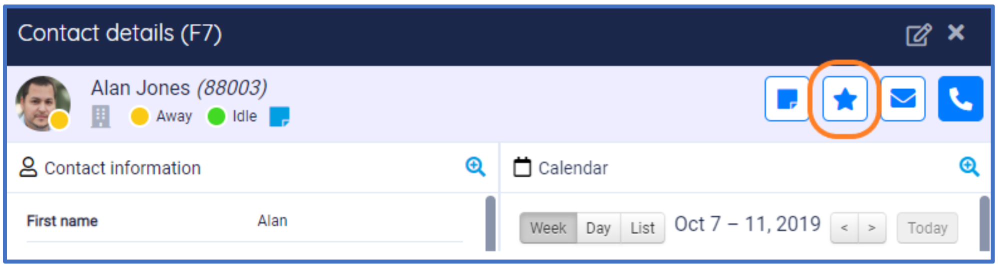
Call the mobile number of the contact (only available when the contact has a mobile phone number)

In F6, the buttons "Edit Contact Note"  and "Add to Favorites"  are always in the drop-down menu.

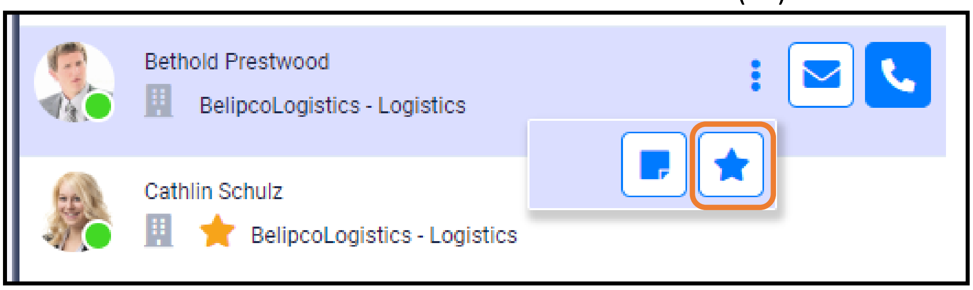
4.9 Managing your favorites

4.9.1 Adding a favorite

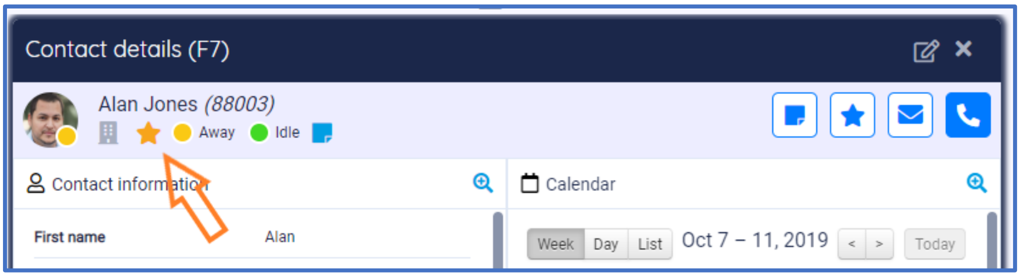
You can mark a contact as favorite by clicking on the star in the contact detail area:



You can also use the favorites button in the contacts list (F6)



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

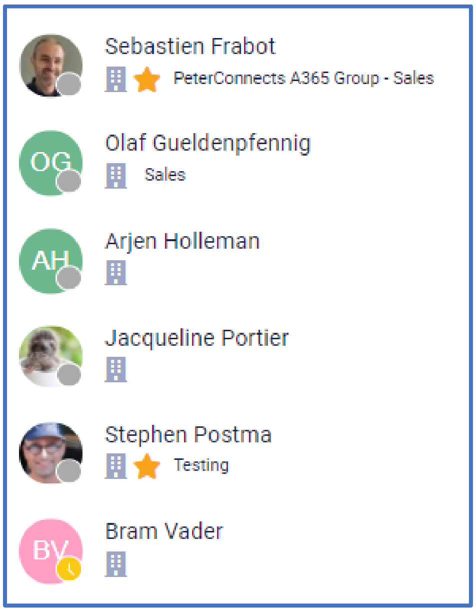


4.9.2 Removing a favorite

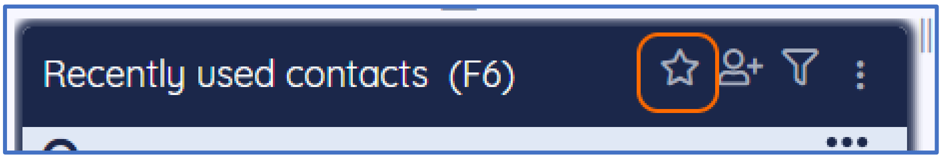
You can click on the 'Remove from favorites' button again, to remove the contact from your favorites.

4.9.3 Displaying favorites

The contact list indicates your favorites with a star:

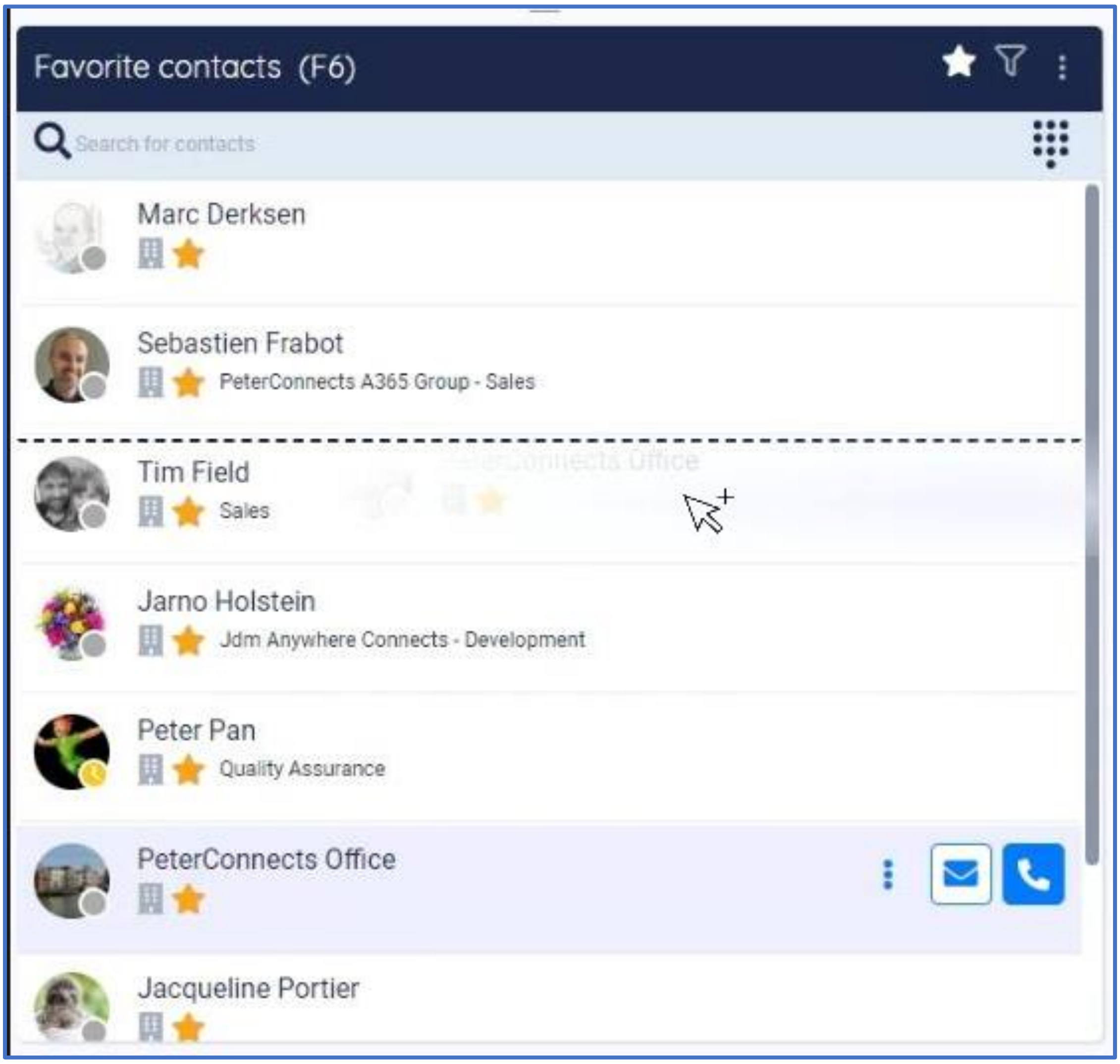


To view all your favorites, you can switch to the 'favorite mode' by clicking on the star in the title bar:

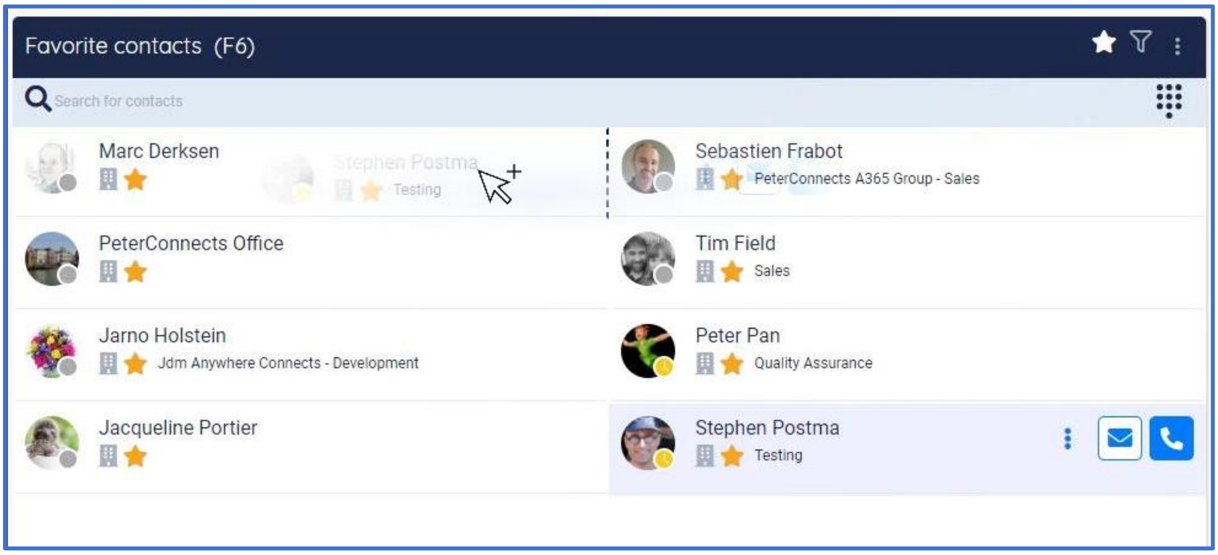


4.9.4 Sorting favorites

When you are in the favorites mode, you can arrange your favorites by dragging and dropping a contact from one place to another. The dashed line indicates the place where your favorite will be moved.

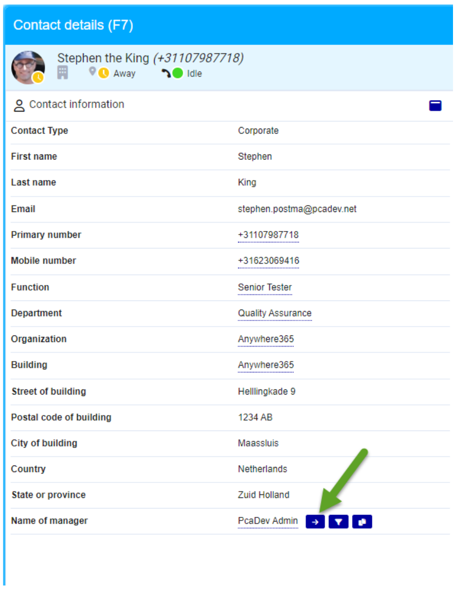


When there are multiple columns in the contact list, the dashed line will appear to the left or right side of the contacts, depending on whether you hover over the left or right part of a contact:



1.1.1. Direct opening Manager contact info in F7 (Microsoft login only)

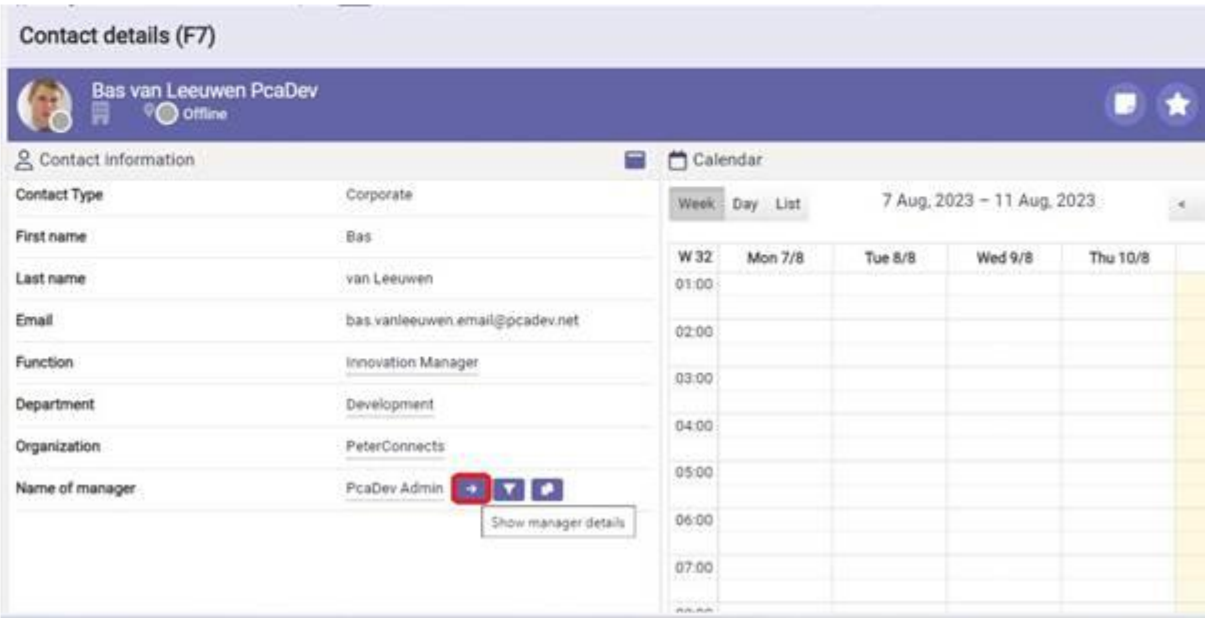
When clicking to manager name in a specific contact displayed in F7, the user will be able to see information or to interact with the manager of that specific contact. To return back, after opening the manager details, the user have to click to the contact name in F6



Direct opening Manager contact info

Often being in contact with a customer and looking for a contact in F6 and this contact is not available one asks to know his manager or want to speak to this manager. With the possibility the of opening the manager contact information a call or transfer can be initiated from F7 that will show that contact information of the manager.

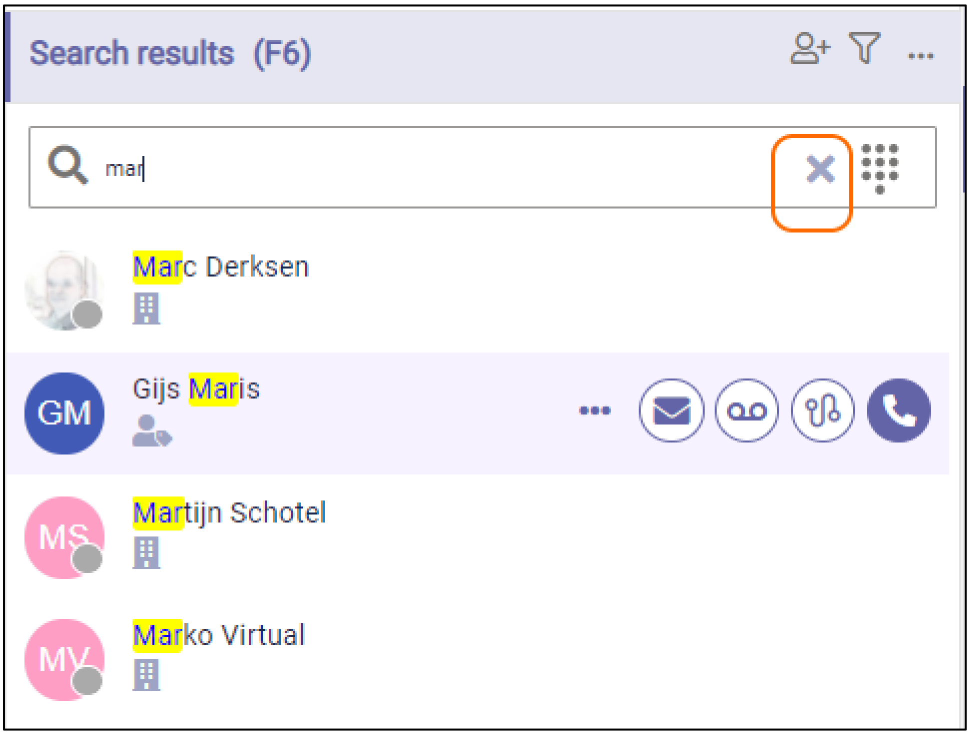
With the  button



4.10 Searching and filtering

4.10.1 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:



Select X in the search box or press “Escape” to clear the search text.

4.10.1.1 Webex and Broadworks login
You can search on various fields, like Name, number, e-mail address or department. You can also search on parts a name. For example if a name is 'Elliot', it is possible to search on Ell', but also on 'iot'.

4.10.1.2 Microsoft login
In case you use your Microsoft account to log in, all fields that you see in the contact information are searchable in the search box in F6.

Note: In this situation it is not possible to search on text that is not at the beginning of a word. For example, if a name is 'Elliot', it is possible to search on Ell', but not on 'iot'. When a name is 'Van Halen', it is possible to search on 'Hal'.

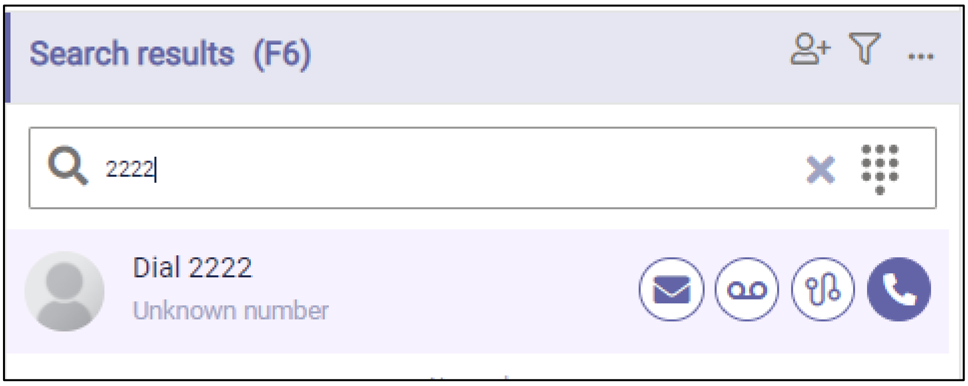
The contact list search results will be sorted based on the field in which the search term is found. From most important to less important the order is:

1. firstname
2. displayname and lastname
3. email
4. department
5. function
6. other fields.

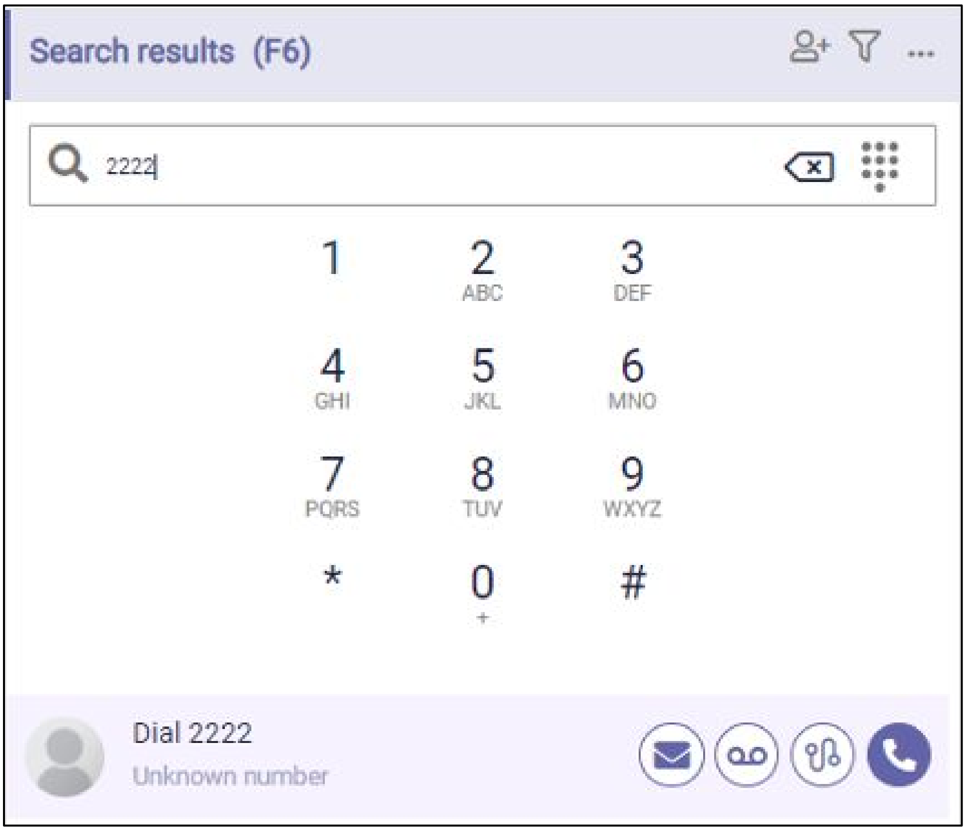
This order of this list indicates the weighting of the search. If the searchtext is found in the same field then it will get more priority if it is an exact match. So when searching for "Rob" a person with firstname "Rob" will be shown first and a person with firstname "Robert" will be shown later. If the field and whether it is an exact match or not are equal then the favorites are shown first followed by the most recently used.

Note: A contact’s displayname is defined in the User management of Microsoft 365 admin center.
When the result limit is reached, not all matching contacts are displayed. In such a case, enter a more precise search term to refine your search to find a specific contact.

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

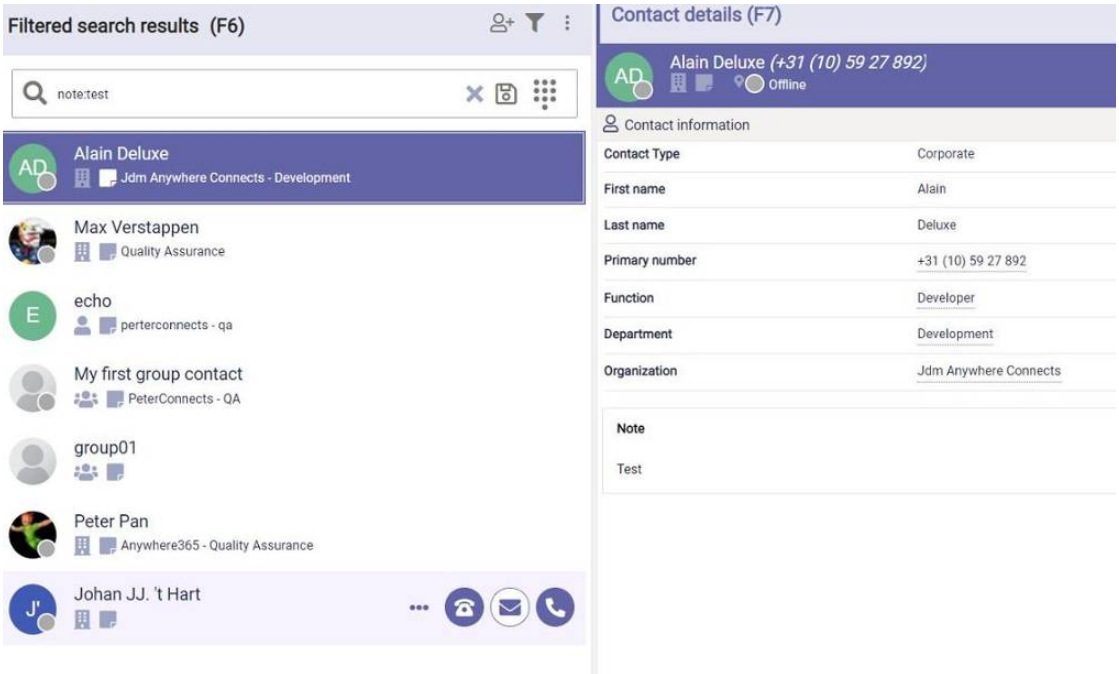


Instead of typing the numbers, you can also use the dial pad. You can toggle the dial pad on and off by selecting the dial pad .



4.10.1.4 Searching contact notes (only Microsoft login)

The contact notes can be searched now. You can do a specific search on with the prefix "note:" or a note specific search without the prefix.



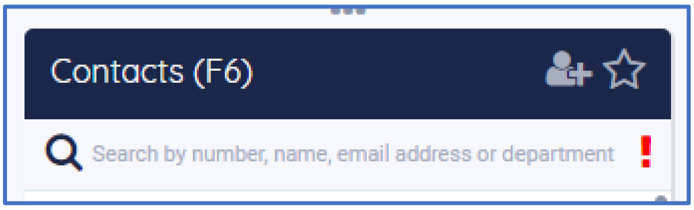
So when searching with a search term like "note:test", it will match contacts that have a contact note with a word that starts with (or equals to) "test".

When searching with a search term like "test" it will match the same contacts plus the contacts that have any other field with a word that matches "test".

A match on contact note will have the lowest priority so it is displayed at the bottom.

4.10.1.5 Restriction of search results depending on license

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

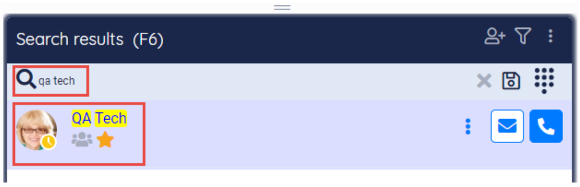


When you hover your mouse over the exclamation mark, you can see that your license might be restricting the number of group contacts that you see.

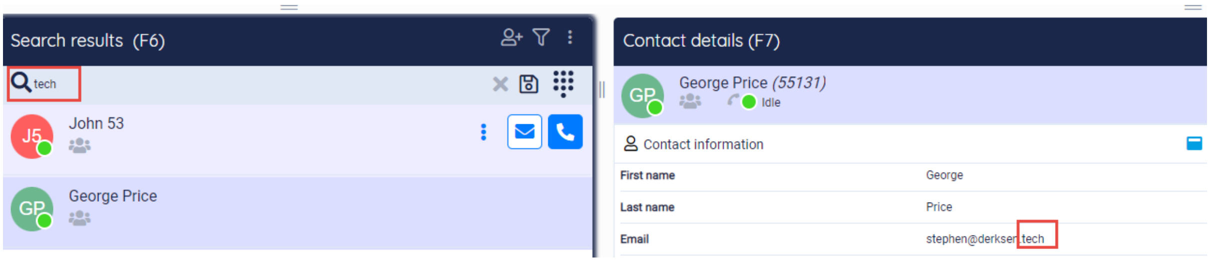
When using the Webex login, it is only possible to search contacts on the ‘displayname’ field in Webex. This field usually is a combination of first name and lastname.

A second limitation for the Webex login is that search is only possible when entering a search string that has a full match from the beginning of the name.

Example search on ‘qa tech’ returns the contact with name ‘QA Tech’:



A search on only ‘tech’ will not return this contact, but returns results that match on the term ‘tech’ (in this case the email address):

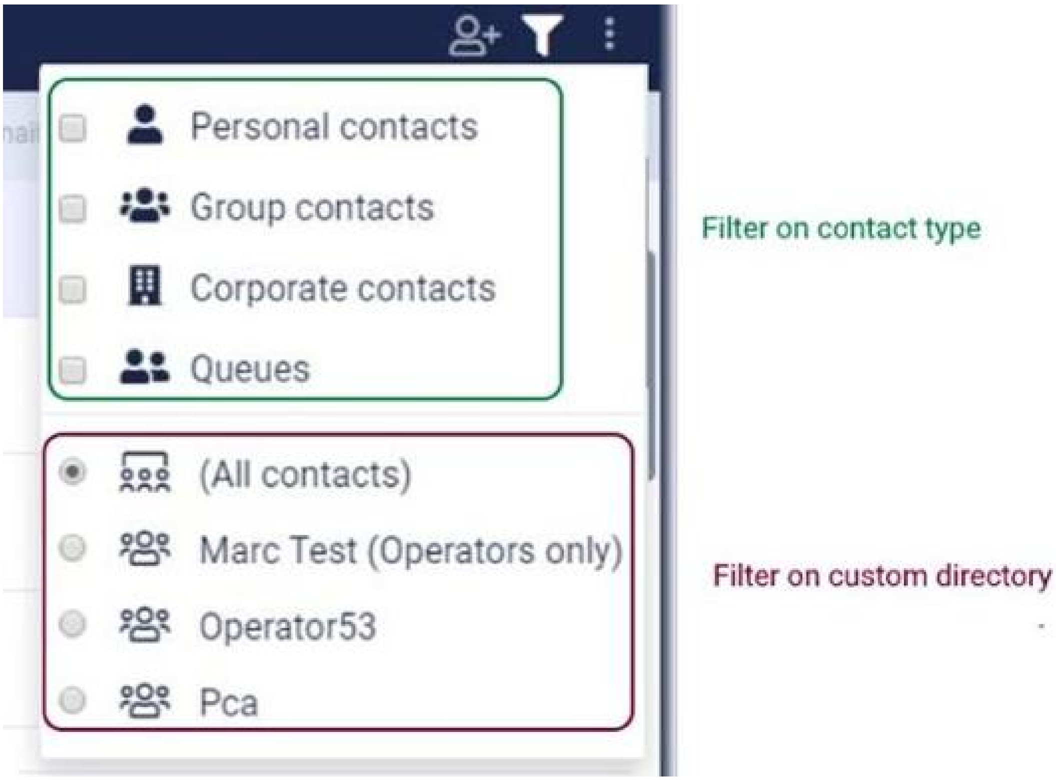


4.10.2 Filtering contacts from the filter menu

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.

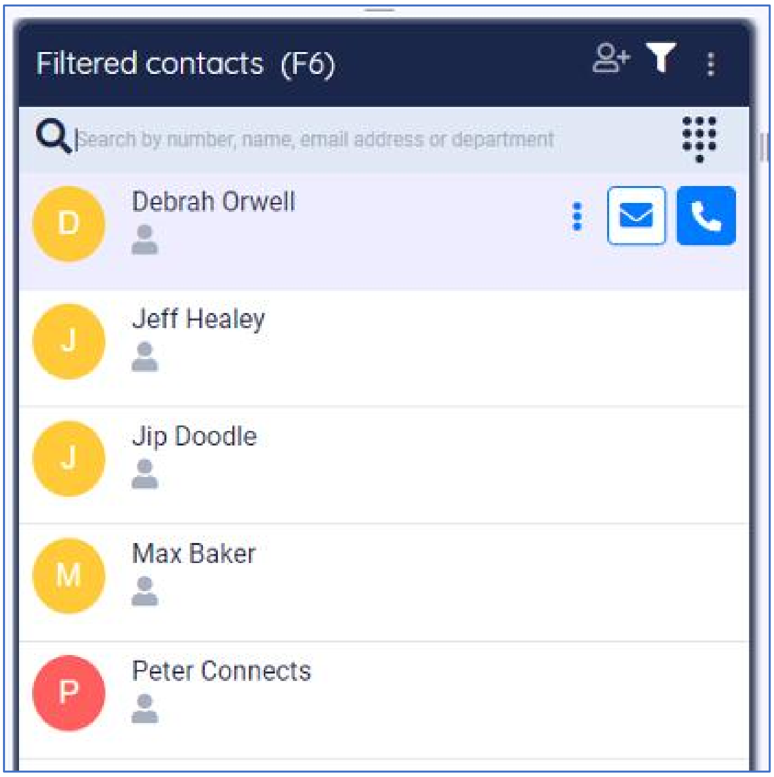
The filter settings will be displayed in a drop-down menu. The filter contains two sections: contact types and custom directories.



You can filter on one of the sections. For example, if you only want to show personal contacts, you check the checkbox in front of ‘Personal contacts. 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.

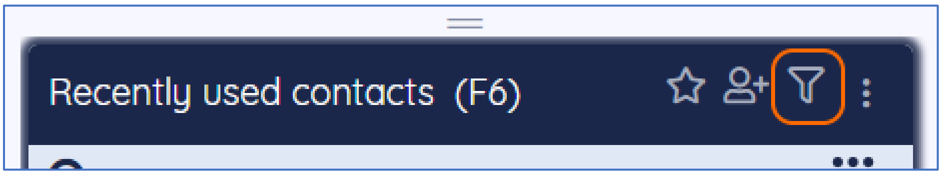
You can also combine these sections. So you can indicate that you only want all Group contacts in custom directory ‘Pca’. Or only your favorite corporate contacts.

Here is an example when you filter on Personal Contacts:



When activating one of the filter options, the filter is automatically switched on, and it will remain active until you turn it off by clicking on the ‘Filter contacts’ button again.

When you turn on the filter again by clicking on the ‘Filter contacts’ button, the last used filter options will be applied again to your contact list.



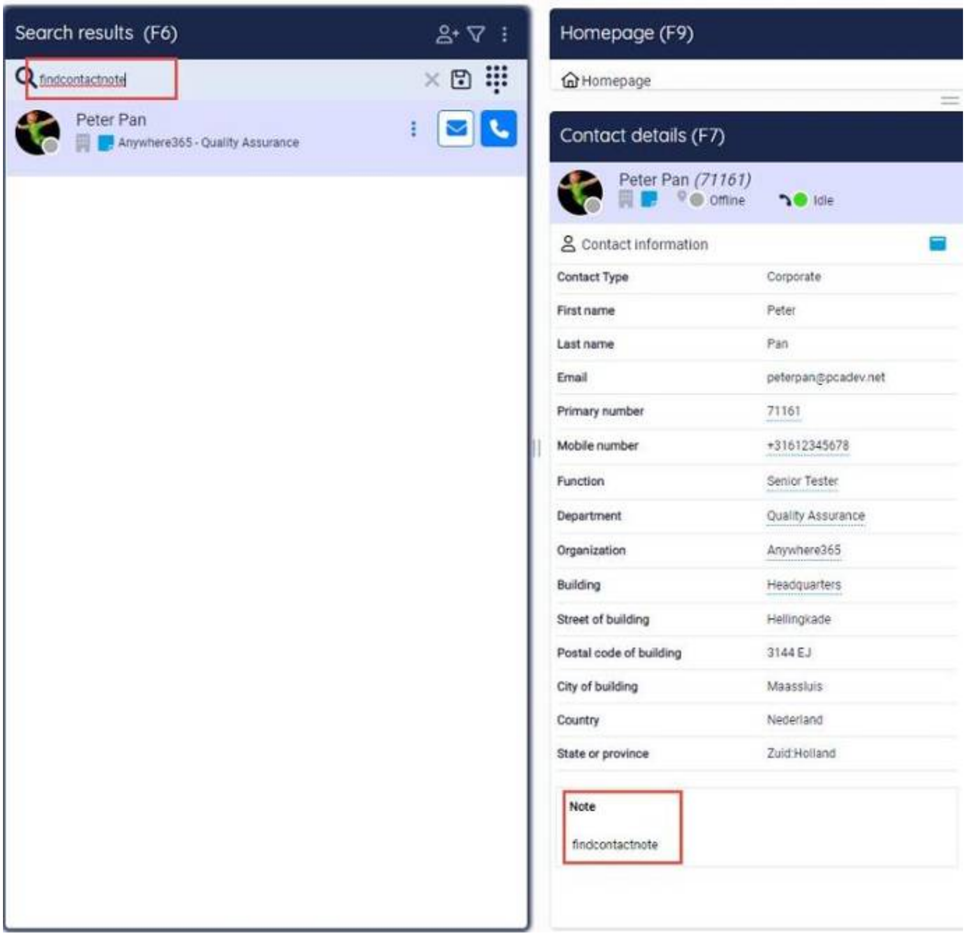
When the ‘Filter Contacts’ icon is like this: , the filter is active.

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

Your filter settings will be remembered between your sessions.

1.1.1. Contact notes are searchable

The contact notes can be searched now when logging in with a Broadworks account.
You can do a specific search on with the prefix "note:" or a note specific search without the prefix. So when searching with a search term like "note:important" it will match contacts that have a contact note with a word that starts with (or equals to) "important". When searching with a search term like "important" it will match the same contacts plus the contacts that have any other field with a word that matches "important".
A match on contact note will have the lowest priority so it is displayed at the bottom.



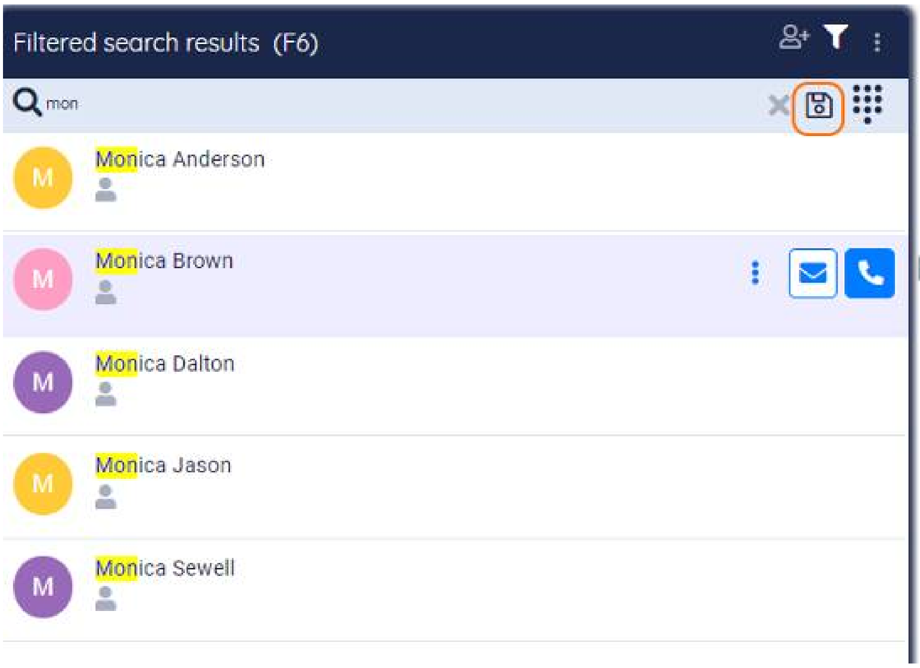
4.10.3 Saving search queries

In the Receptionist you can save your search queries so you can use them later on. The saved search queries actually are a combination of a filter and/or a search string.

4.10.3.1 Saving a search query

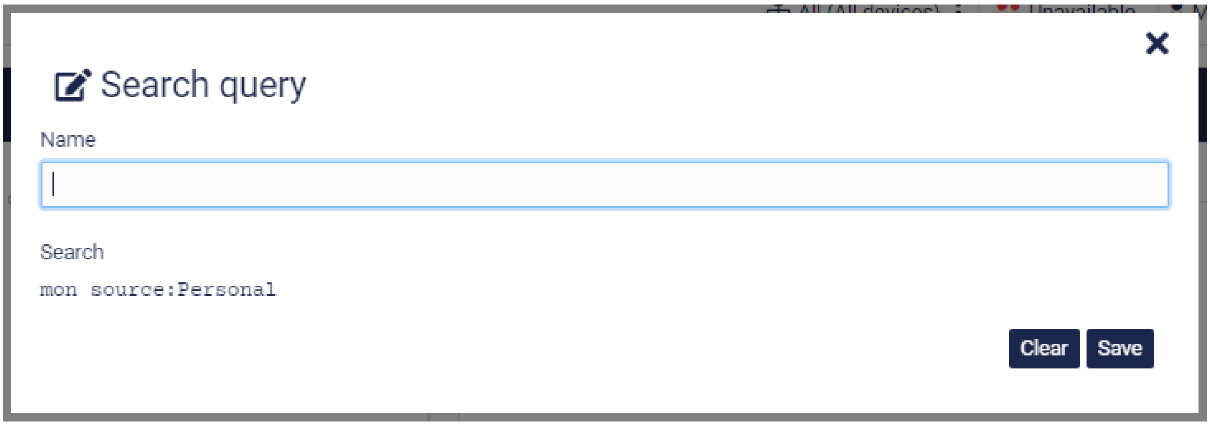
You can create a filter, whenever you are filtering and/or searching, for example when you are filtering on “Personal contacts” and you want all contacts that have “mon” in the name:

When you want to save this query, you can click on the “save” button in the search bar:



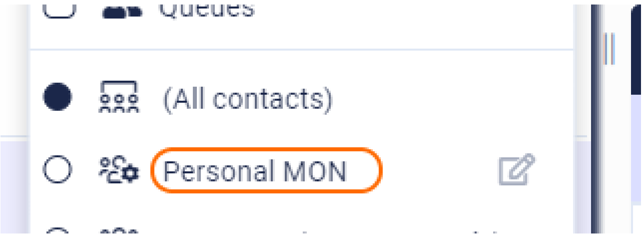
Note: The save button can be disabled, if you have reached the maximum number of saved queries. In that case, you have to delete a saved search query first.

When you click on the save button, a popup will be shown, where you can give your saved query a name:



In the popup, you can also see the Advanced Search text, that is used to list these contacts. (For more information about the Advanced Search syntax, see the paragraph about Advanced Search later on in this chapter).

Then click on button "Save", to finalize your search query. If you open your filter drop down, you will see that your search query has been saved. Right below the contact types, you will see a section that contains your saved search queries:



When you click on a saved search query, the contact list will show only the contacts that apply to that query. When you click on "(All contacts)", the filter will be cleared and you will see all contacts again.

4.10.3.2 Editing a saved search query

You can change the name of a saved search query by clicking on the edit icon. Then the popup will appear, where you can enter a new name.

4.10.3.3 Deleting a saved search query

You can delete a saved search query by clicking on the edit icon. Then the popup will appear. Click on the trashcan button to remove the name. A question will be shown if you want to delete the item, with two buttons "Yes" and "No". Click "Yes" to delete the item or click "No" to get back to editing the item.

4.10.4 Advanced search

The Receptionist that uses the standard login or the Teams login supports advanced search. This means that you can build your own search string that also includes filter options.

4.10.4.1 Syntax

A search string contains keys and values. A key-value pair looks like this:

```
key:values
```

for example:

```
source:Personal,Corporate
```

In the example above, the search will be limited by only Personal and Corporate contacts.

A key-value pair of values cannot contain spaces, commas or a colon. If you need it to contain those, then the values need to be included in a set of quotes. For example:

```
key:"value 1","value:2"
```

4.10.4.2 Overview of keys and values

<no key>	All values in the string that are not preceded by a key will be used as a search term. For example:
	
	`dav`
	
	will look for contacts that contain the word "dav" in either the first name, last name and some other fields. Another example:
	
	`dav bow`
	
	will look for all contacts that contain either the word "dav" and the word "bow" in the first name, last name, and some other fields.

Source	This will limit the search to the specified sources. For example `source:personal` will look for all personal contacts. The various sources are: - Personal - Group - Corporate - Queue

A combination of keys and values can be used for searching. For example:

```
dav source:personal
```

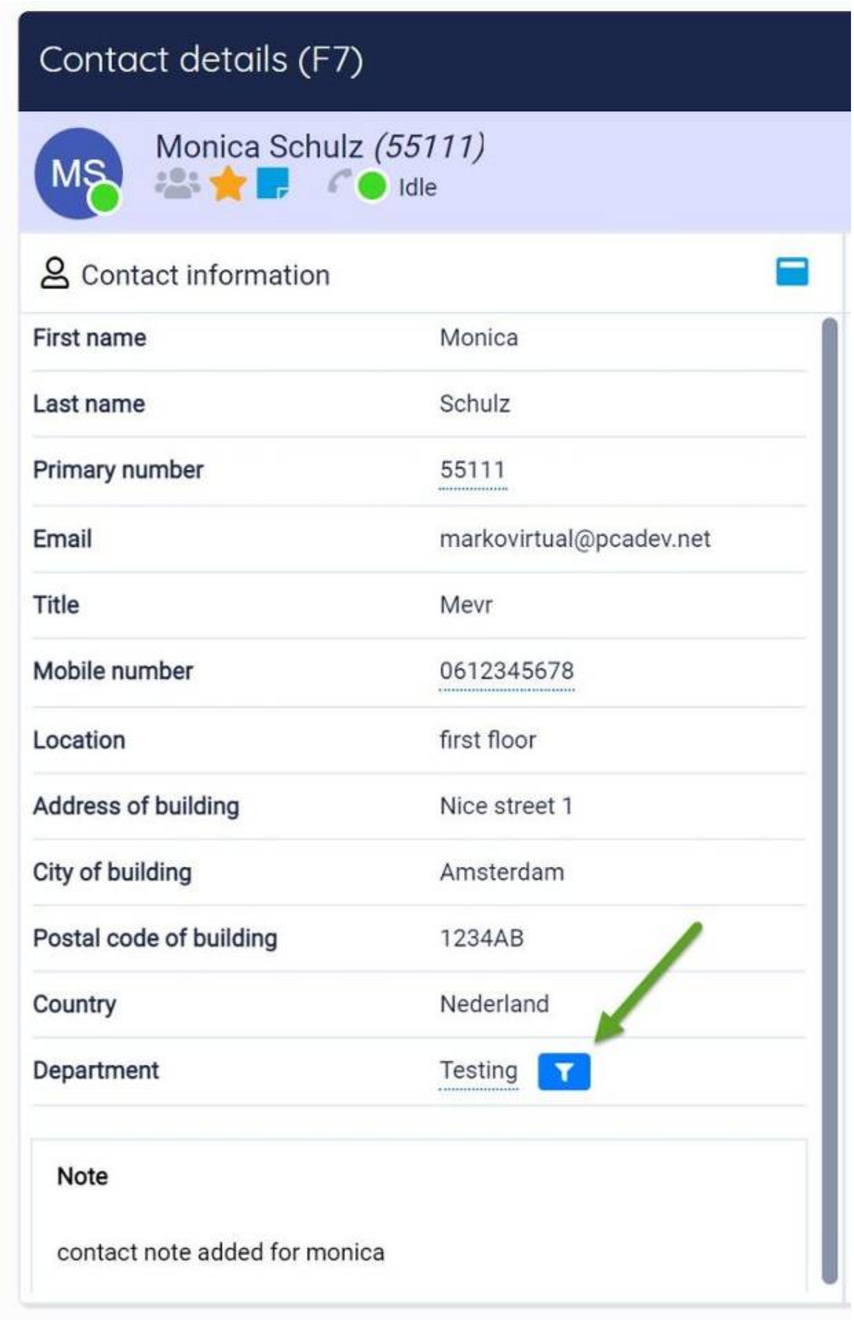
looks for all personal contacts and 'dav'   in either the first name, last name and some other fields

It is possible to search the other contact details fields as well, the following fields are searchable:

Contact details field name	Example	Broadworks field name
First name	`FirstName:dav`	First name
Last name	`LastName:dav`	Last name
Email	`Email:dav@dav.com`	Email
Primary number	`Phone:123`	Extension
Alternative number	`CompanyAltPhone:123`	Phone Number
Mobile number	`MobilePhone:123`	Mobile phone
Pager	`Pager:123`	Pager
Title	`Title:msc`	Title
Organization *)	`Organization:dev`	Company name
Building *)	`Building:dav`	Office
Department	`Department:sales`	Department
Location	`Location:dav`	Location
Address of building **)	`buildingAddress:dav`	Address
Street of building *)	`BuildingStreet:dav`	Street address
Postal code of building	`BuildingPostalCode:123`	ZIP or postal code
City of building	`BuildingCity:dav`	City
State or province *)	`BuildingState:dav`	State or province
Country	`BuildingCountry:dav`	Country

*) only available when using the Teams login.
**) only available when using the standard login

For some fields in the contact details, a clickable filter icon appears next to the value, which inserts it as a search term, making it easy to find more contacts of the same kind:



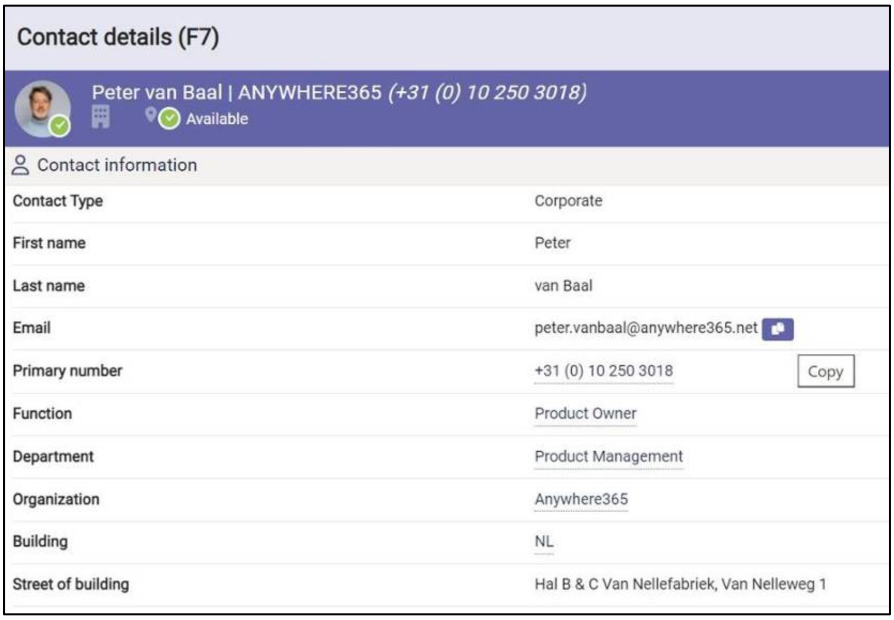
Following field shows this clickable filter icon:

- Function *)
- Department
- Organization *)
- Building *)

*) only available when using the Teams login.

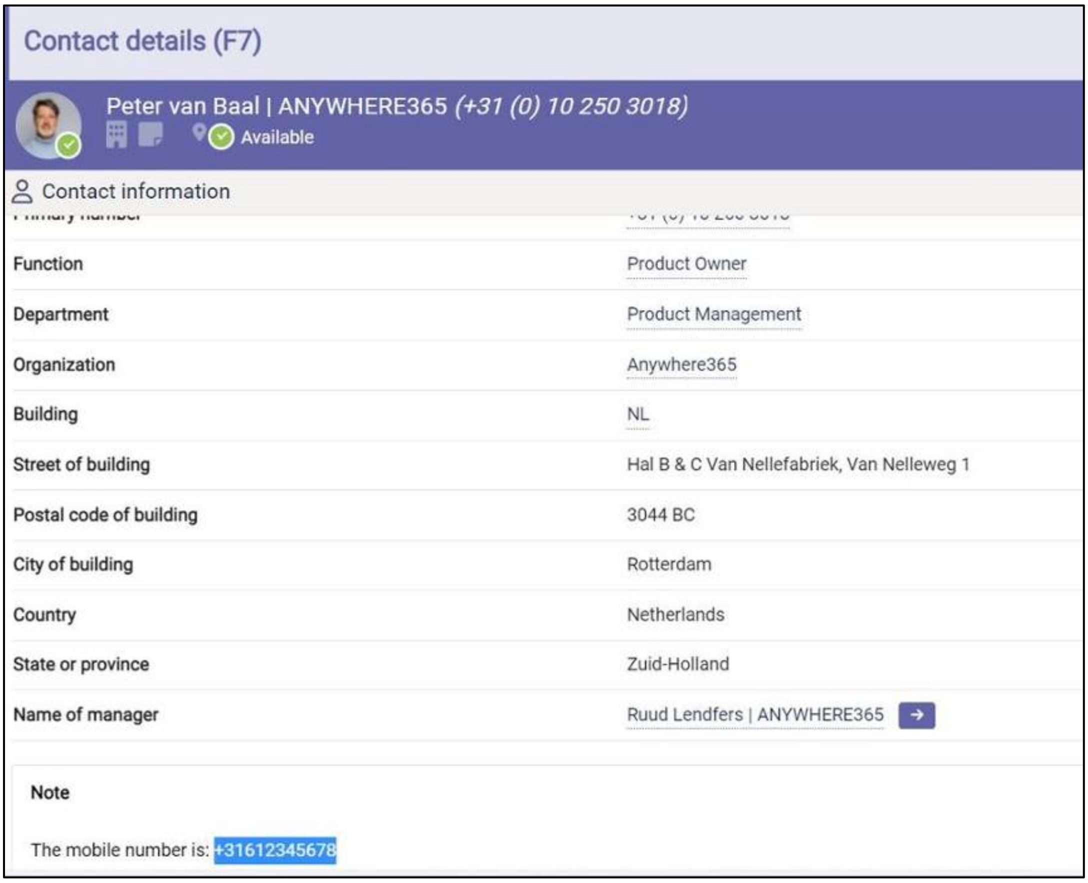
4.10.5 Copy contact information

The Attendant Console provides functionality for easy copying contact information. Most of the contact fields present a  button when hovering over it. By clicking on this button the information in the field will be copied.



4.10.5.1 Copy information from the Notes

Often the additional Notes contain information, like telephone numbers that need to be copied. Copying this information is done by selecting the information that need to be copied and automatically it will copy the information.

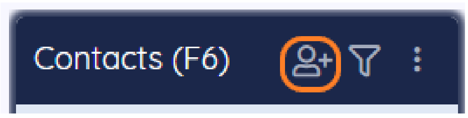


4.11 Editing contacts

4.11.1 Adding a contact

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

1. Click on the 'Add 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.

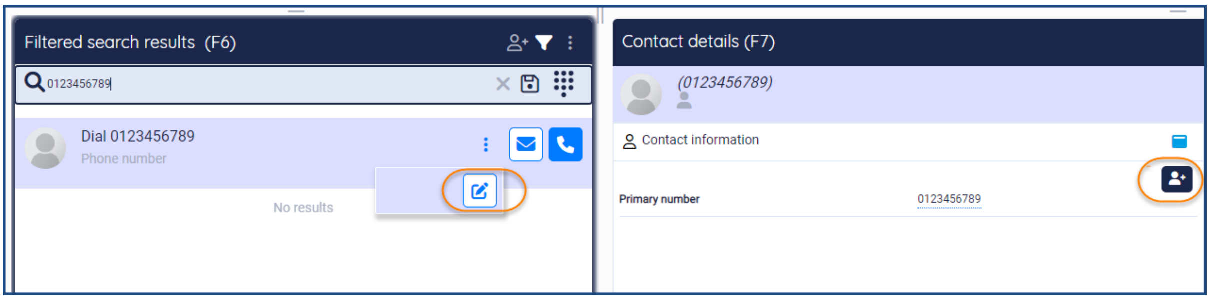
   Note that the fields in the image might differ depending on your edition of the Receptionist.

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.

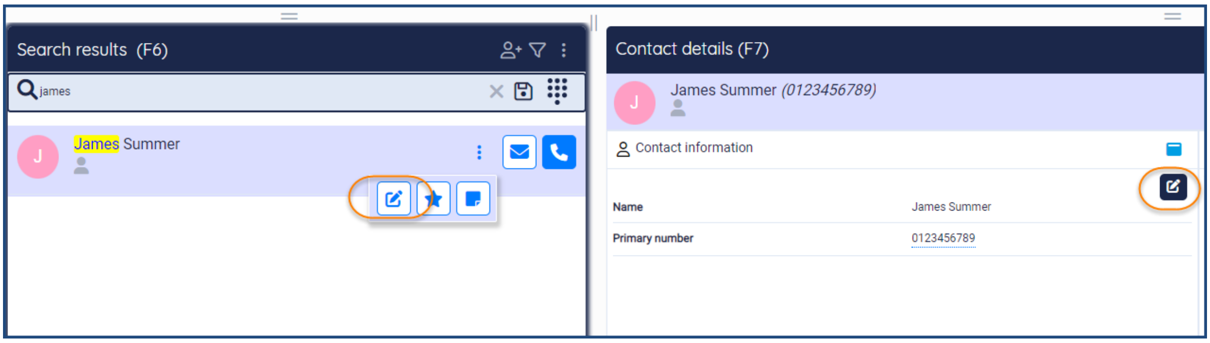
   You can also use the button in F6 to add the contact.



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

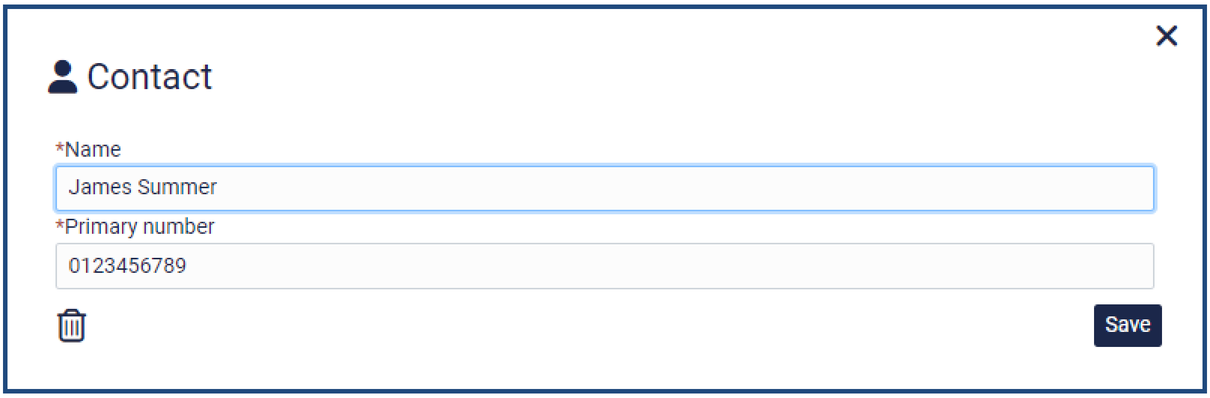
4.11.2 Editing a contact

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 or click the “Edit” button in F6 itself (Hidden behind the 3 dots).



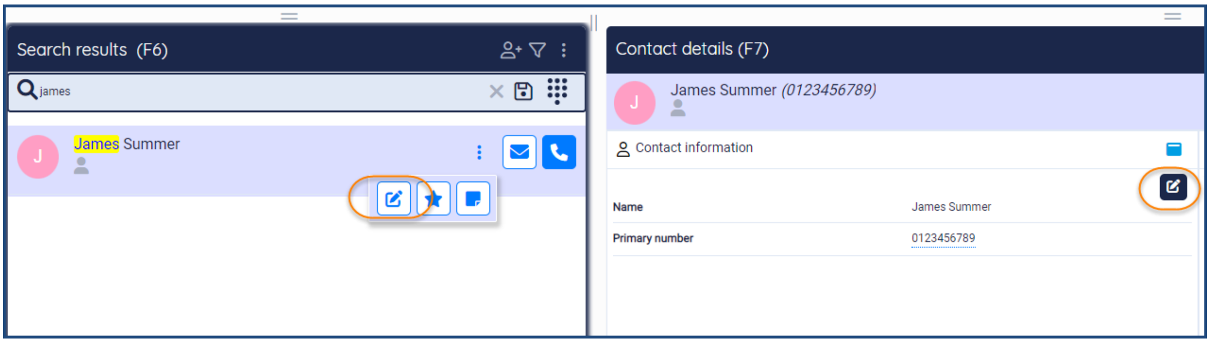
The contact pop-up appears. When you are ready editing the contact, click on the button 'Save' to save the changes or on the 'X' to cancel editing.

Note that the fields in the image might differ depending on your edition of the Receptionist.

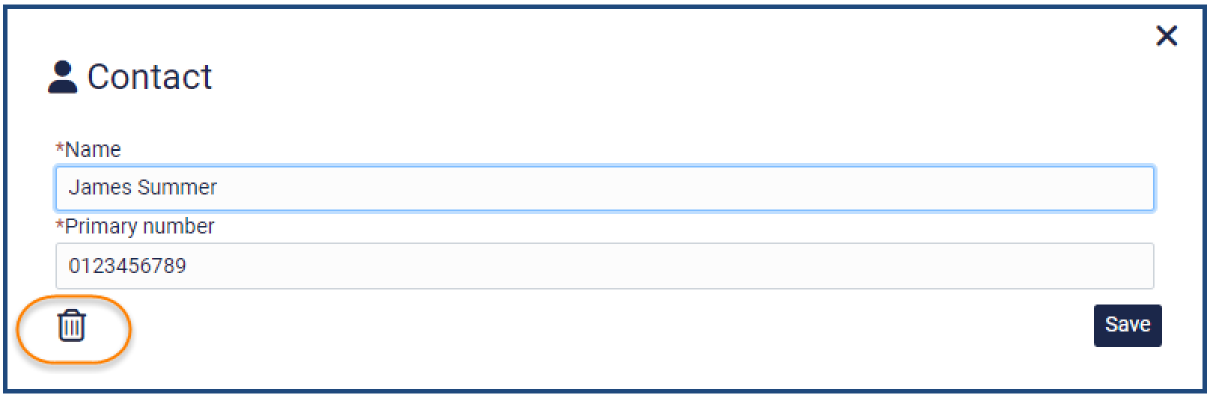


4.11.3 Deleting a contact

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 "Edit" in the contact information widget in F7 or click the "Edit" button in F6 itself (Hidden behind the 3 dots).



A popup will open where you can edit the contact, but there will also be a trashcan button:



A confirmation message will be displayed, asking if you really want to delete this contact.

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

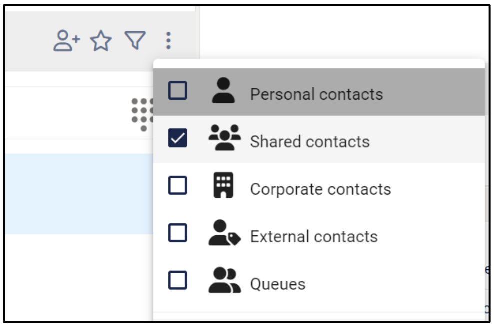
4.12 Shared contacts

Shared contacts are managed within the Receptionist, but contrary to Personal contacts, they are visible for all Receptionist users. The privilege to manage Shared contacts can be controlled from the Admin portal (see section: User privileges via Admin portal).

Note: Shared contact functionality is only available when logging in into the Receptionist with a Microsoft account.

4.12.1 Filtering shared contacts

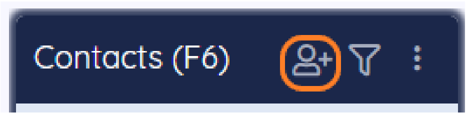
You can filter on Shared contacts in the filter menu.



4.12.2 Adding a shared contact

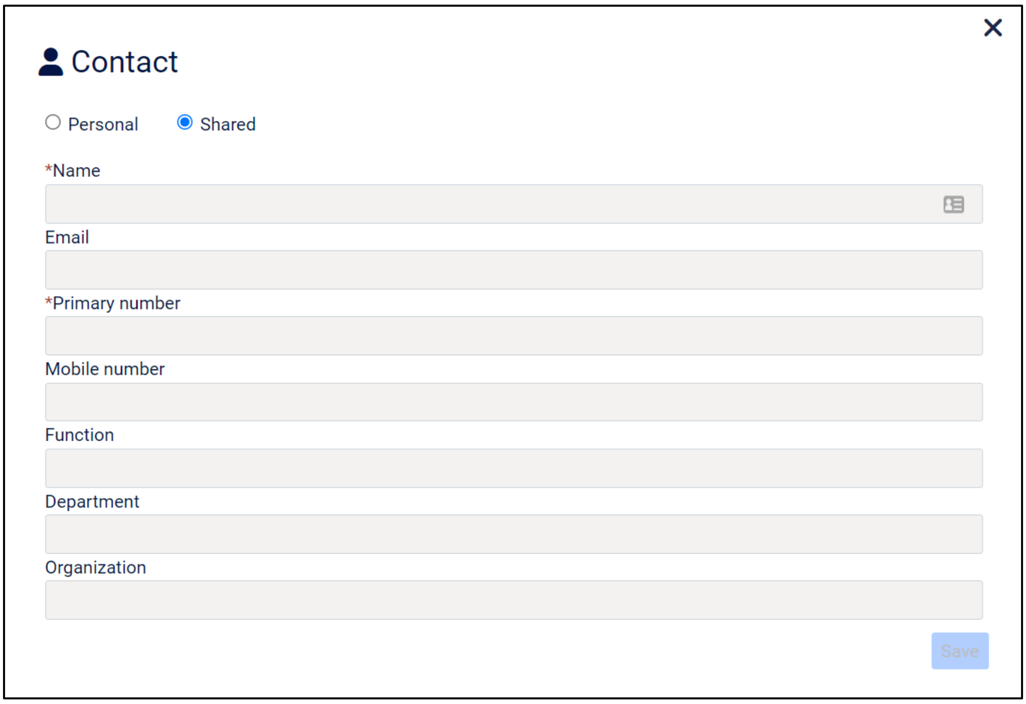
You can add Shared contacts to the contact list in case your account has the rights to do so assigned in the Admin Portal. The steps are:

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



2. Now, a pop-up appears. Select 'Shared contact' and enter the data of the new Shared contact. Click on the 'Save' button to save the new contact. Click on 'X' to cancel.

Note that the fields in the image might differ depending on your edition of the Receptionist

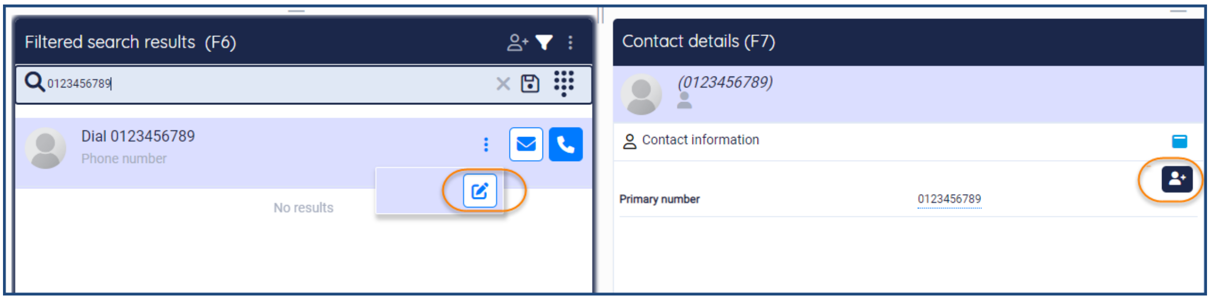


Another way to add a contact is:

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.

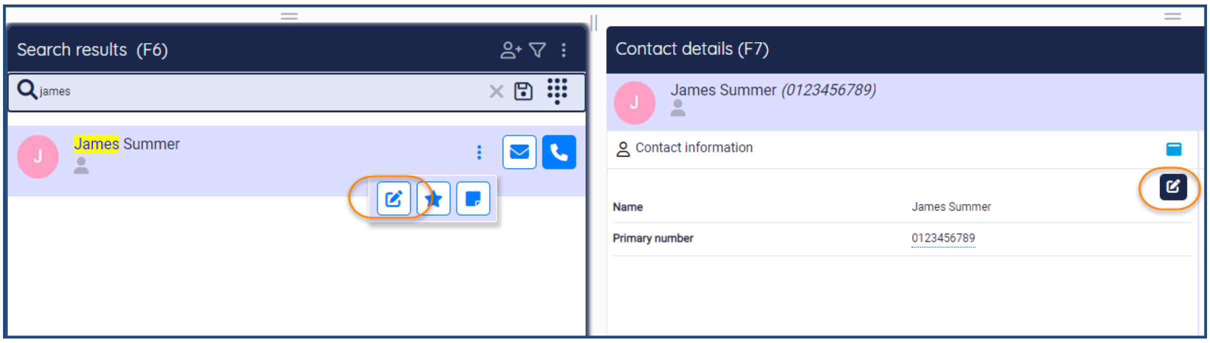
   You can also use the button in F6 to add the contact.



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

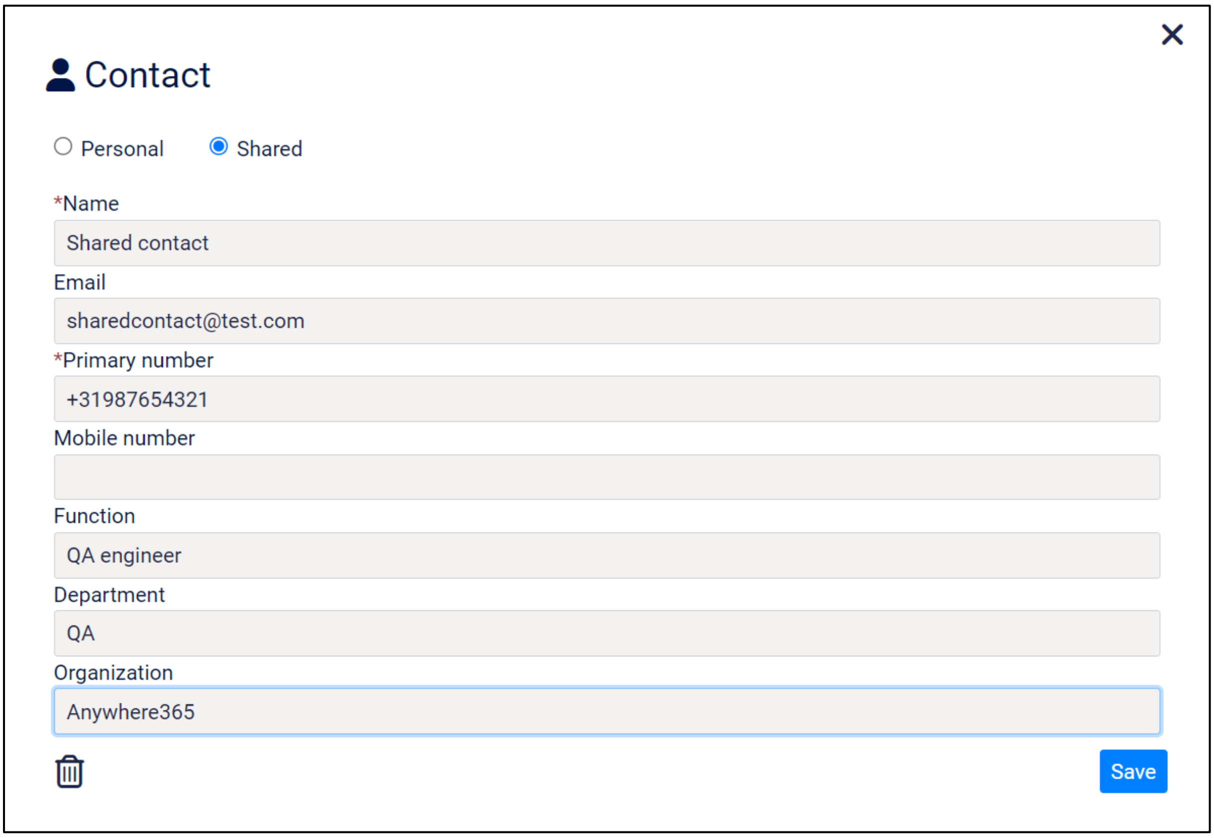
4.12.3 Editing a Shared contact

When you want to edit a Shared 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 or click the "Edit" button in F6 itself (Hidden behind the 3 dots):



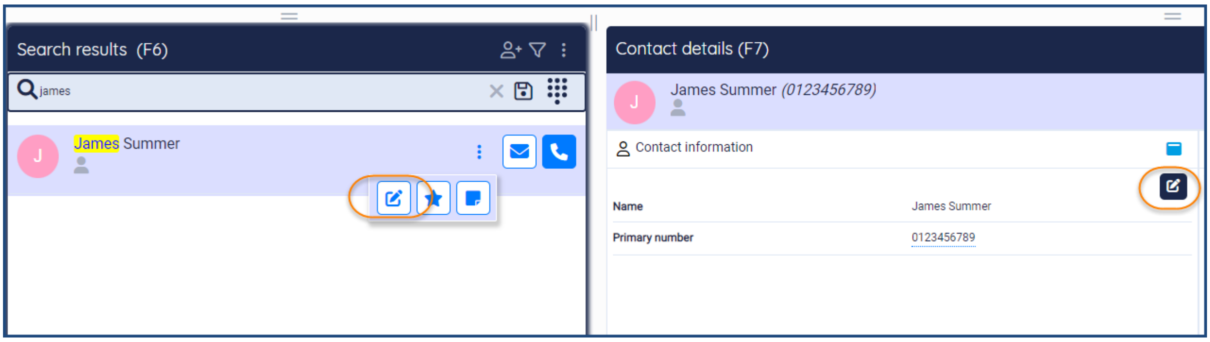
The contact pop-up appears. You can edit the contact, including changing it from Shared contact into Personal contact. You can also convert a Personal contact into a Shared contact and thus making it available for all users. When you are ready editing the contact, click on the button 'Save' to save the changes or on the 'X' to cancel editing.

Note that the fields in the image might differ depending on your edition of the Receptionist.



4.12.4 Deleting a contact

To delete a Shared contact, first search for the contact in the search box of the contact list and select the contact. Then click on the button 'Edit' in the contact information widget in F7.



A popup will open where you can edit the contact, but there will also be a trashcan button:

A confirmation message will be displayed, asking if you really want to delete this contact.

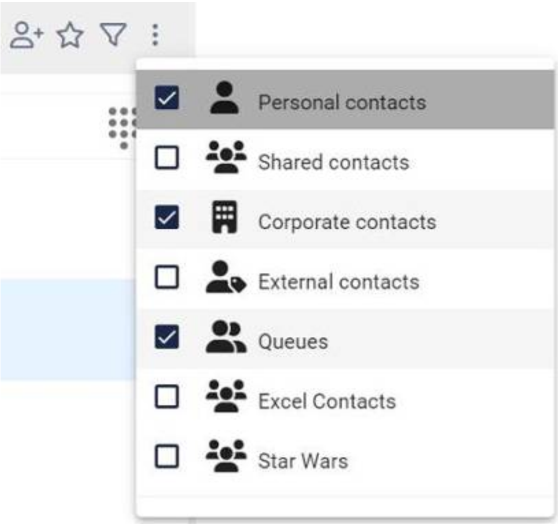
Click on “Yes” to confirm to delete the contact or click on “no” if you don’t want to delete the contact.

4.13 Contact Sources

In addition to the standard Contact Sources, the Attendant supports displaying and filtering contacts from additional sources such as Excel files on a Sharepoint/OneDrive environment. These Contact Sources are managed within the Admin portal.
The contacts are visible to all users that have access to the contact source itself.

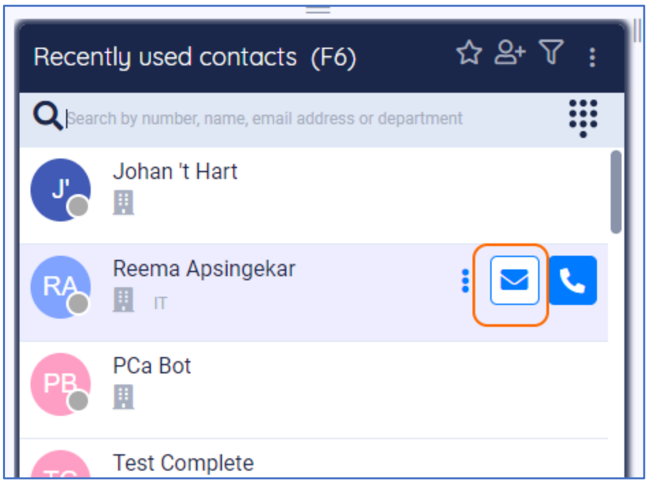
4.13.1 Filtering contact sources

The configured contact sources are shown together with other contact types, in the screenshot below the Queues. The administrator can set up a custom icon for them. On the above screenshot there are 2 external contact sources configured: Excel Contacts and Star Wars Contacts. Using the checkboxes, any combination of contact sources can be enabled or disabled.

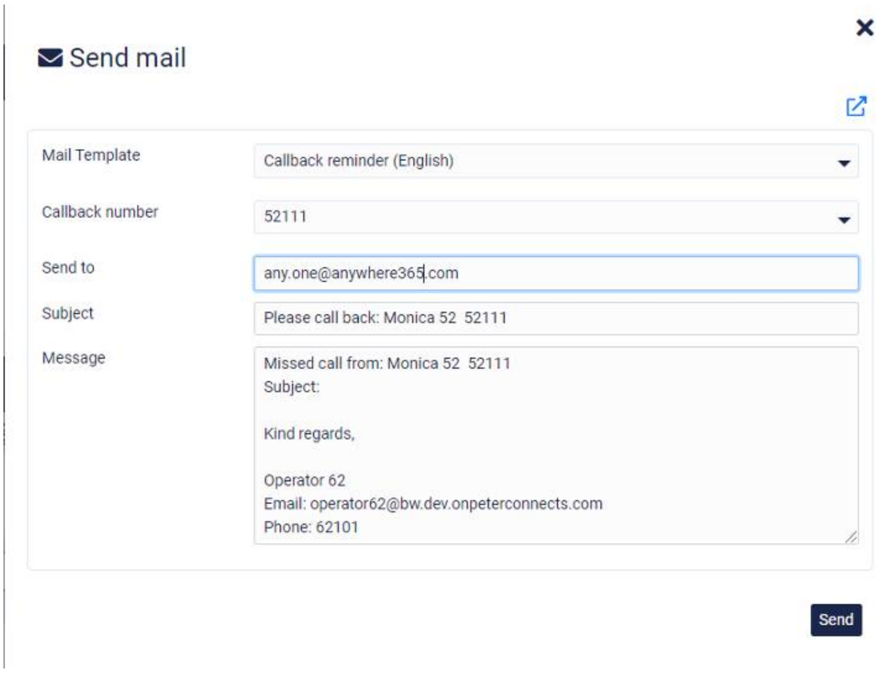


4.14 Sending an email to a contact

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:

Mail Template There are one or more mail templates configured. Each can be in another language. The first one is used as default. The mail template can be changed in the pop-up of the email.

Callback number You can select a phone number the recipient should call back. The list contains the numbers from active calls as well as recent previous calls. The list of call back number is taken from the call history and can contain up to 10 numbers. After selecting a number the phone number and name of the caller (if known) are filled in, into the call back email template. See the screenshot below. The last selected call will be shown in the template.

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.

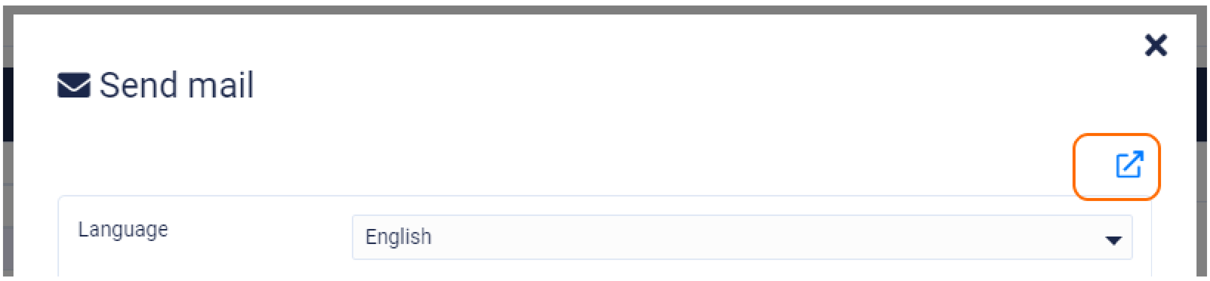
Send to	The email address of the contact. This field is prefilled when the email address of the contact is known. Otherwise, you can enter an email address.
Receive a copy	Check this if you want to receive a copy of the email in your own inbox. The email address that will receive a copy is shown next to the checkbox. If this field is not visible, please check if you have specified an email in your profile.
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 press the ‘ESC’ button.

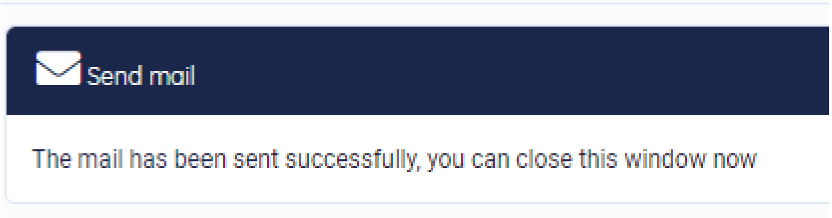
4.14.1 Opening the email form in a new window

Suppose you are writing a mail, but suddenly you have to do something in the Receptionist. Then you would like to close the mail popup and work on your mail later on. For this purpose the mail form has a pop out button:



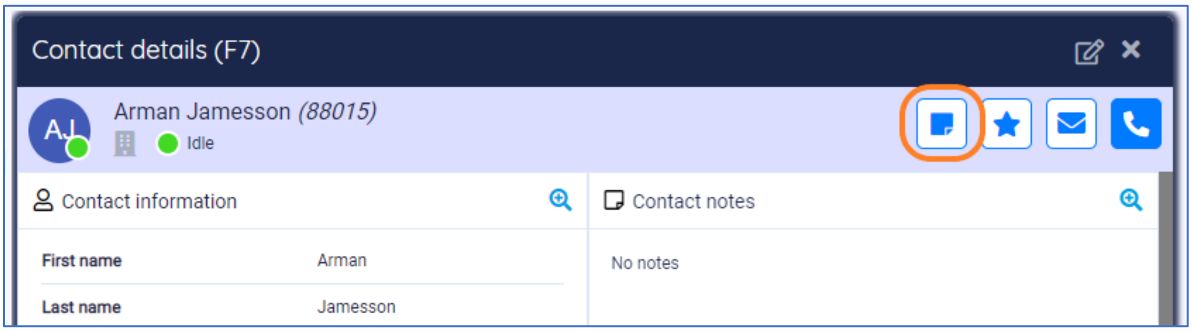
When you click on this button, the mail form will be opened in a new browser window. Now you can switch between the browser windows to go to the Receptionist and back to the mail form later on.

When you have sent the email in the pop out window, a message will be displayed that you can close that browser window now:



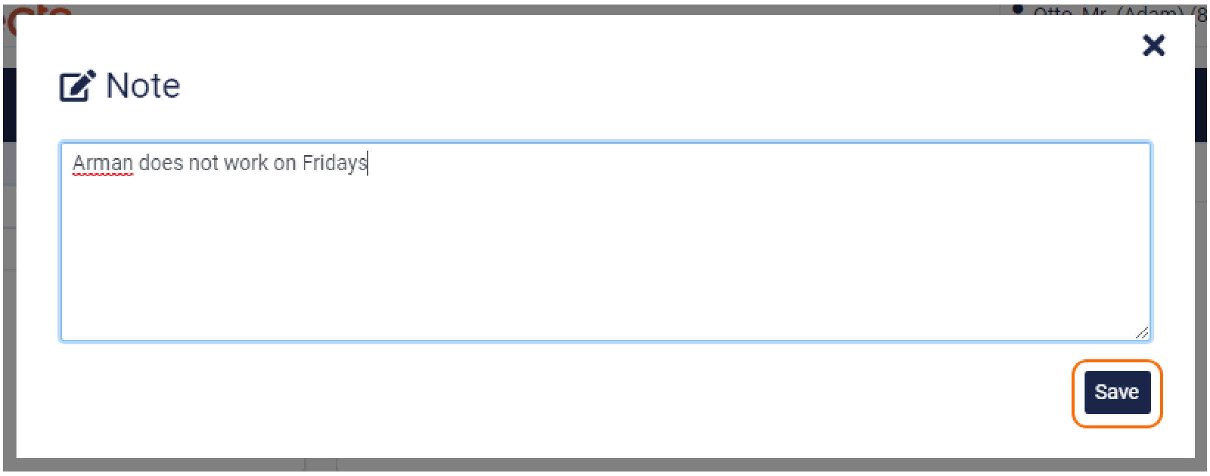
4.15 Making a contact note

In F7 and F3 you can add a note to the selected contact by clicking on the ‘Add note’ button. This feature is only available in the Premium edition.

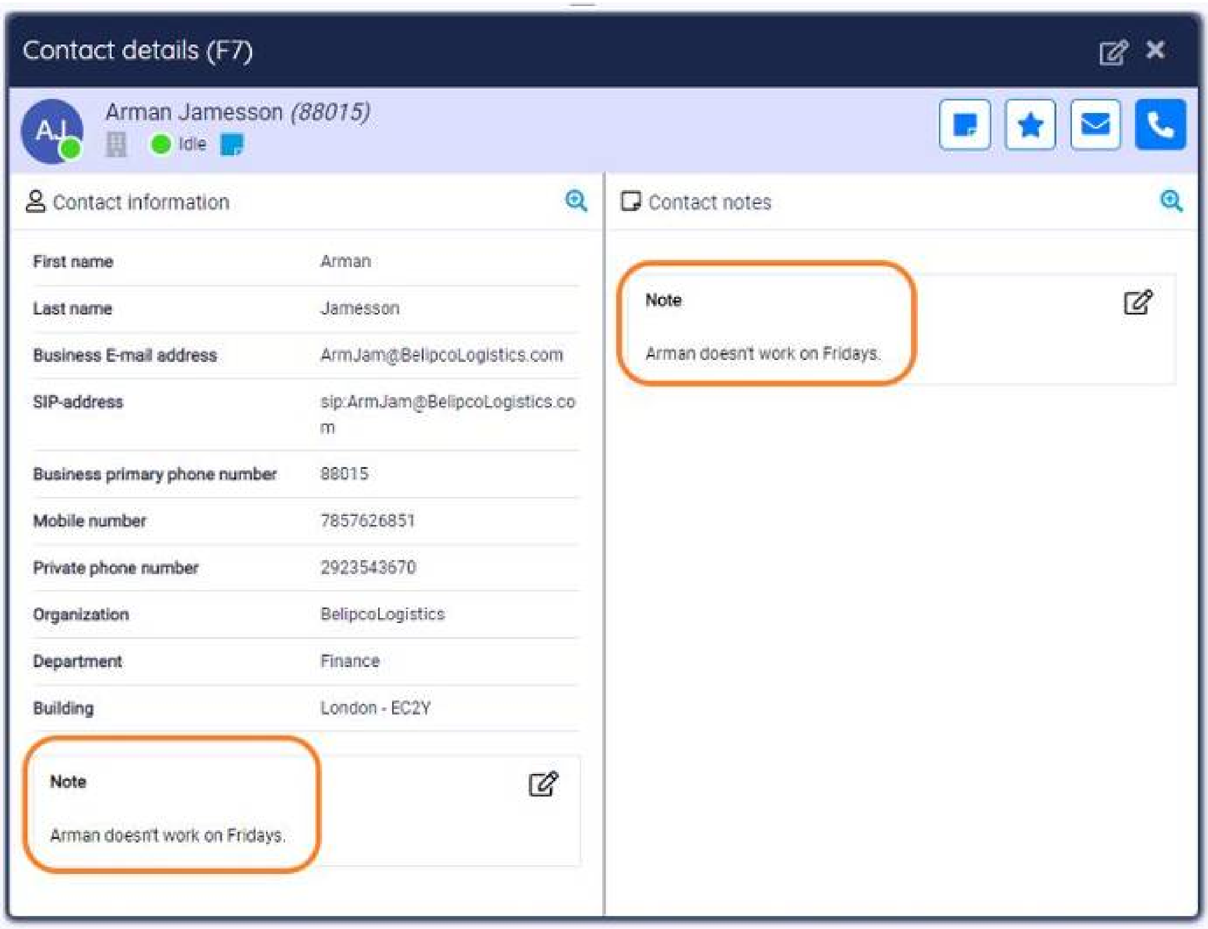


You can also use the ‘Add note’ button in the contacts list (F6)

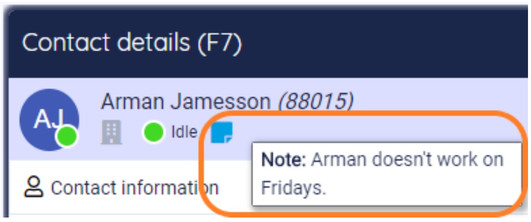
In the popup, you can enter the note. The notes can have a maximum of 1000 characters. Click on the ‘Save’ button, if you want to save the note. Click on the X button, if you want to exit the popup without saving the note.



Now, the note is shown in the contact notes widget and in the contact information widget. Be aware that the contact note can be seen by anyone, who has access to that same contact.



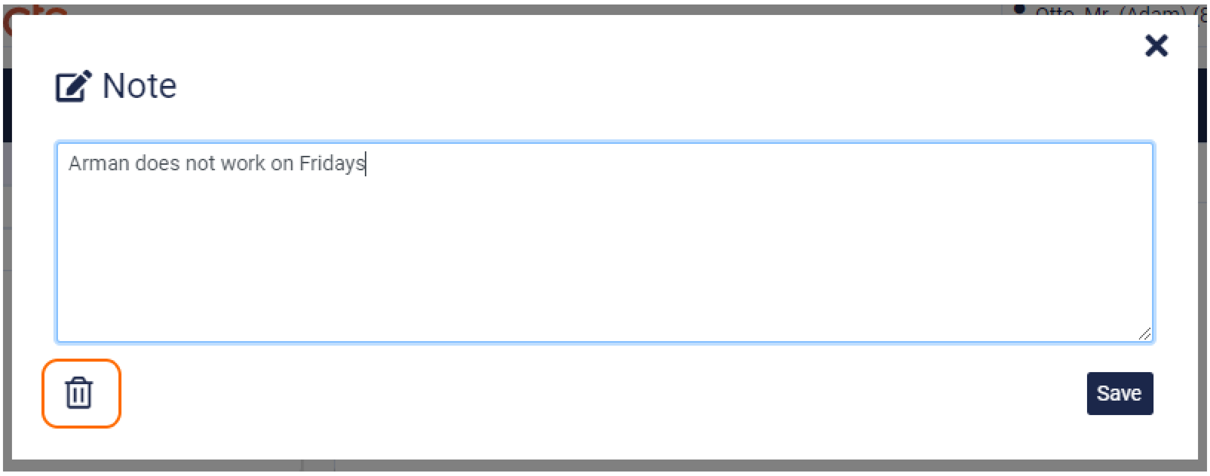
Also, in the contact data in F6 and F7 it is indicated that there is a note for this contact. When you hover over this indication, you see the first 80 characters of the contact note.



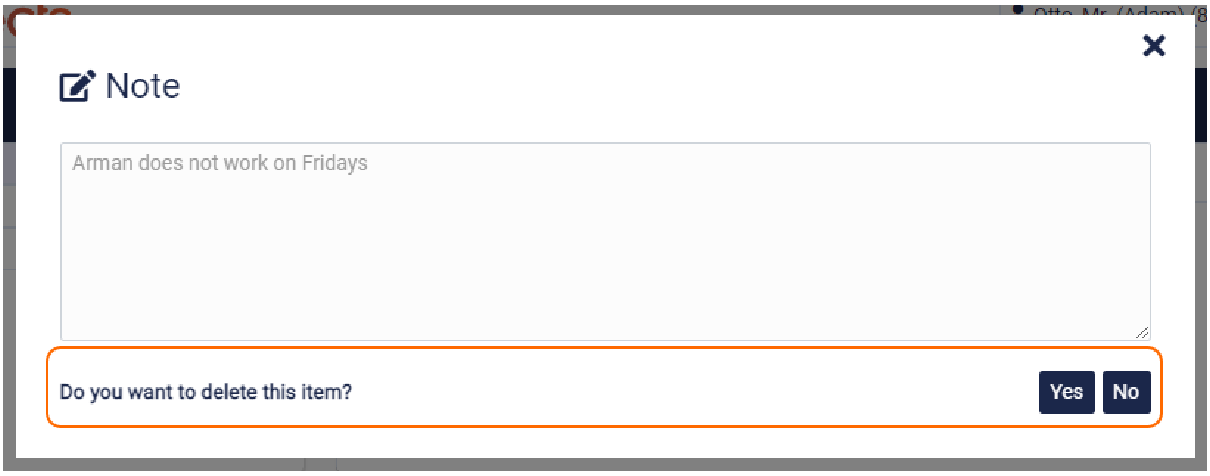
You can edit the contact note in different ways:

- Click on the ‘Edit note’ button
- Click on the ‘Edit’ button in the contact information widget. The button appears while hovering over the widget
- Click on the ‘Edit’ button in the contact note widget. The button appears while hovering over the widget

In the popup, edit the note and click on the ‘Save’ button. If you don’t want to save the changes, click on the X button.
If you want to delete the note, click on the trashcan button in the popup:



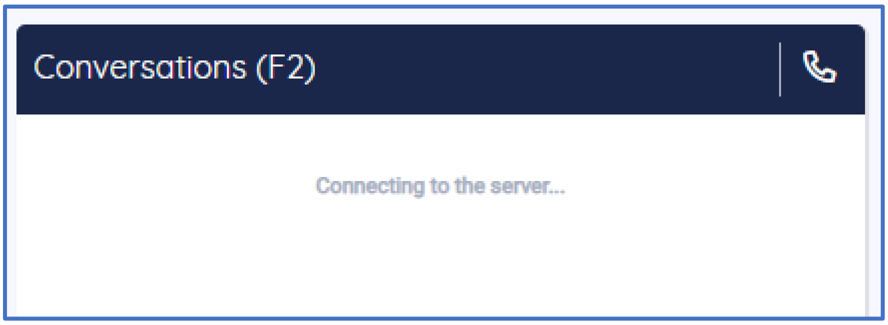
You will be asked if you want to delete the item. Then click on ‘Yes’.


Note
Arman does not work on Fridays
Do you want to delete this item?
Yes
No

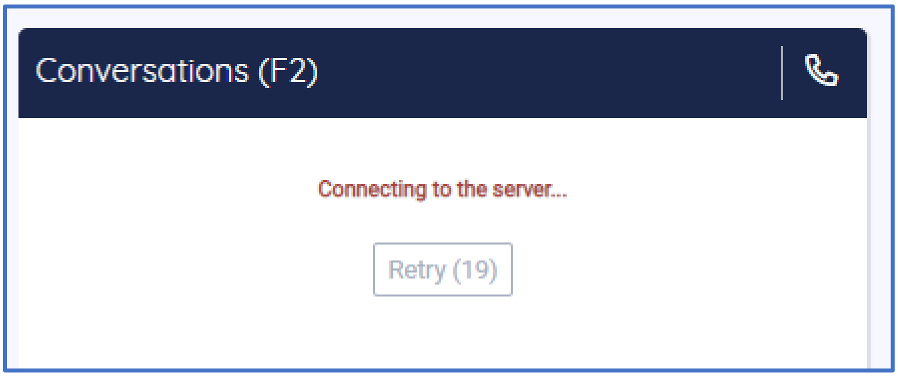
5 Call functionality

5.1 Connection with the server

When the Receptionist is starting up a connection with the server, you will see the following line of text in the conversations screen:



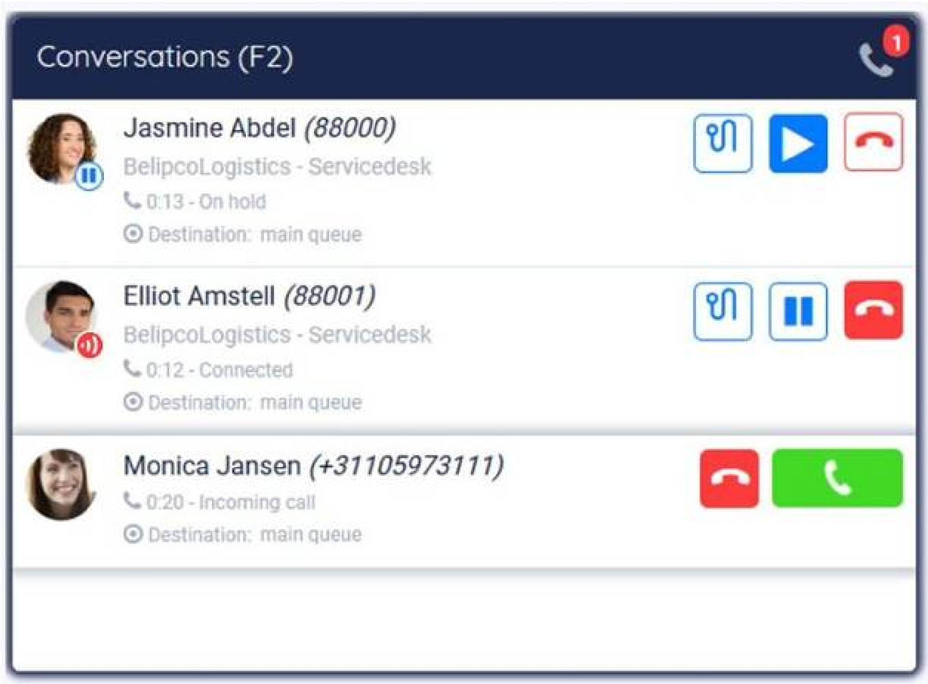
When it takes too long to connect, the text will become accented and a “retry” button will appear. The button mentions how long it will take before the next retry attempt will occur. If you want to retry earlier, you can click on the “retry” button.



5.2 Call states, destination and call actions

In the screen below, there are three calls:

- A call on hold with Jasmine Abdel
- An active call (Elliot Amstell)
- An incoming call (Monica Jansen)



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

5.2.1 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

5.2.2 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:

- 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

This is shown in a call when the operator has picked up this call before.

5.2.3 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

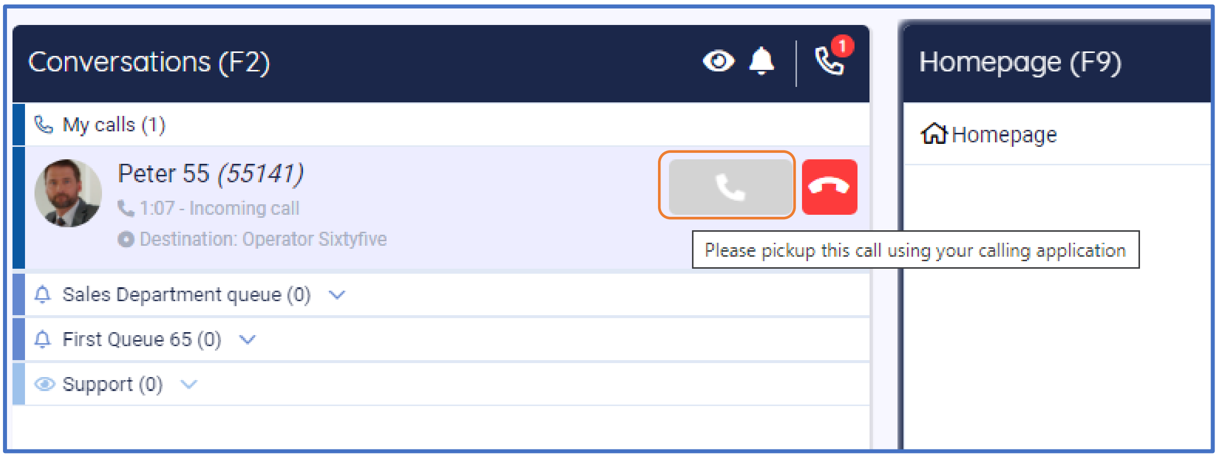
Retrieve a call from hold

Transfer the call

Add to the current conversation

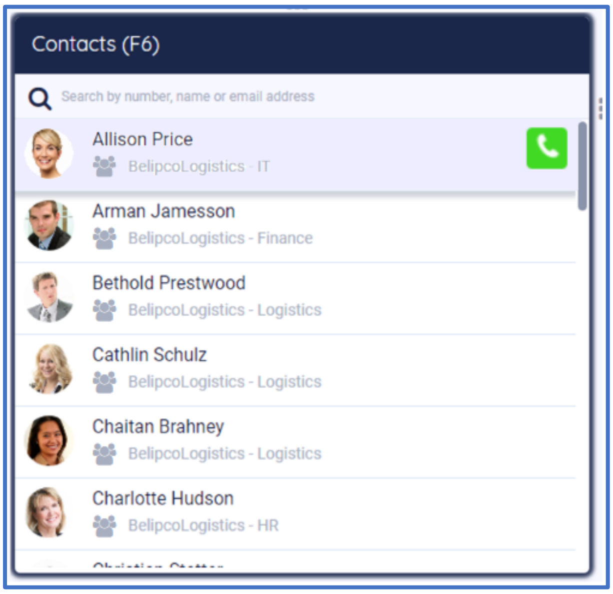
5.2.4 Greyed out pickup button

When the attendant is only using a calling application and no physical device, the pickup button for an incoming call will show up as greyed out, indicating that the phone client should be used to pick up the call.



5.3 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.

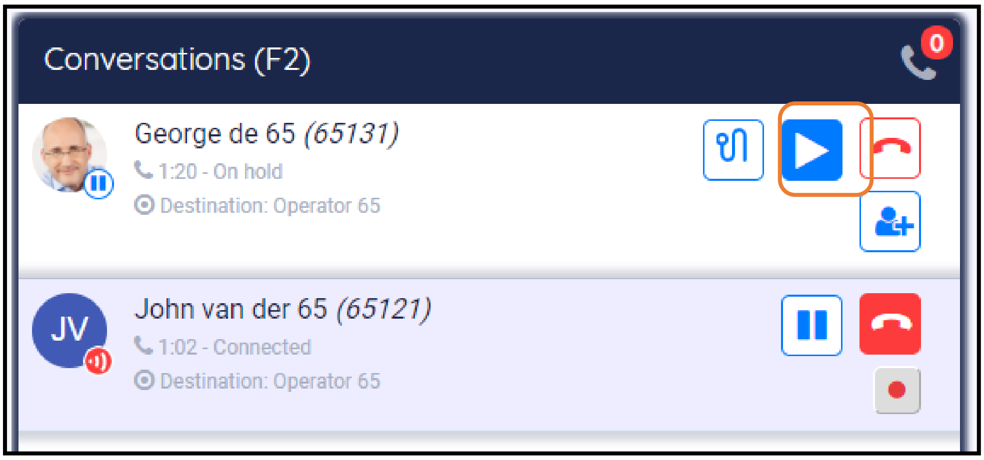
1.1.1. Calling Enterprise contacts from different groups with same extension

When you are part of an enterprise Broadworks deployment, you are able to find users from all groups and call them

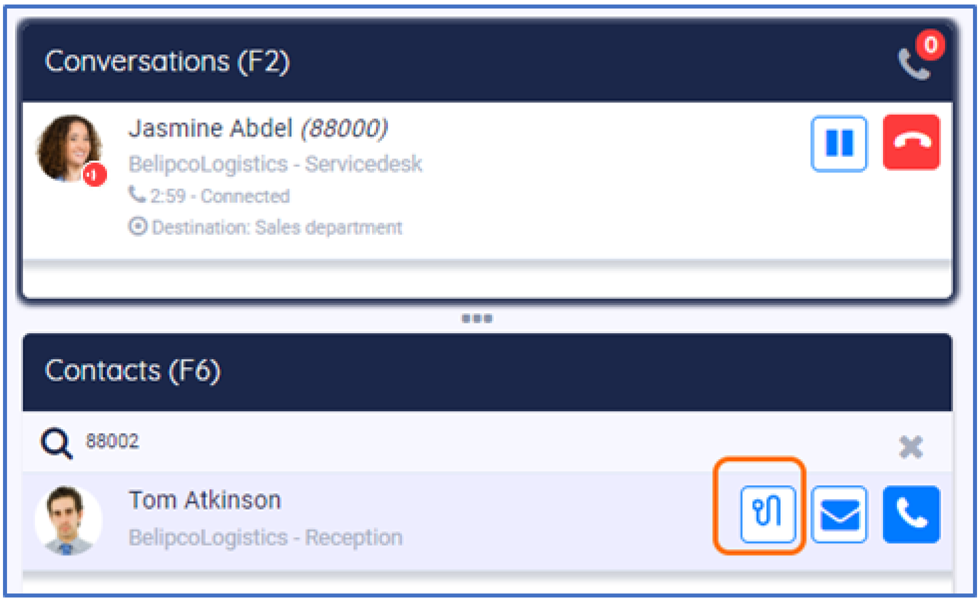
5.4 Transferring a call

There are several ways to transfer a call:

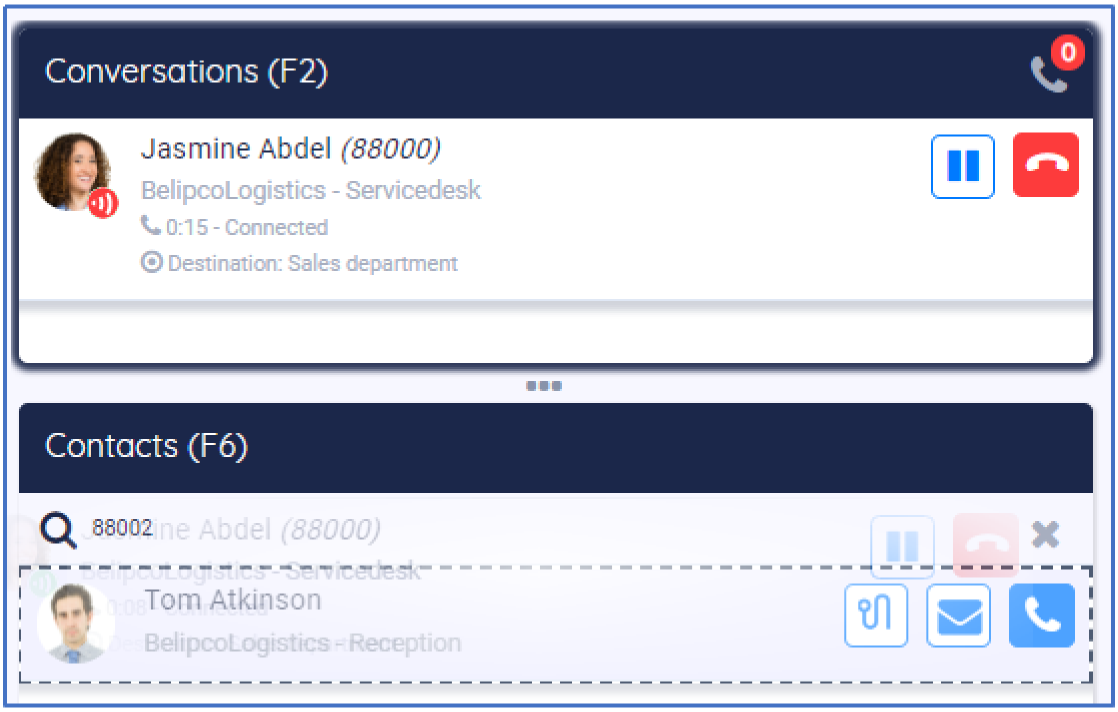
1. Transfer an active call to a hold call (announced transfer)
When you have an active call and a call on hold, you can click on the transfer button to transfer the active call to the held call:



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.



5.5 Call recording

When you are in a call, there is the possibility to record the call or fragments of the call. To start recording, click on the red record button:

The recording button will start flashing quickly, while the recording is starting up. When the recording has started, the pause and stop button will appear too, and the recording button (disabled) will start flashing slowly, so you know that a recording is in progress.

Press the pause button to pause the recording. After pausing you can resume by clicking on the start button again.

Click the stop button to stop the recording. After stopping the recording, you can start a new recording by clicking the start button again.

5.6 Call recording options

The administrator can set some call recording options. Depending on the chosen option, the relevant recording buttons will be visible and behave accordingly. The following options are available:

- **Always:** When a conversation starts, the recording will automatically begin. There will be no stop or pause button. The recording button will indicate that the recording is in progress.

- **Always with pause/resume:** When a conversation starts, call recording will automatically begin. But you can press the pause button to stop the recording temporarily.

- **On demand:** The conversation is always recorded, but the recording will be deleted after the conversation has been finished. However, before or during a conversation, you can indicate (by clicking on the recording button) that the recording must be saved. Once this indication has been given, the recording can be paused and resumed.

- **On demand with user-initiated start:** During the conversation, the receptionist can start, pause and stop the recording.

- **Never:** Conversations cannot be recorded; the recording buttons will not be visible.

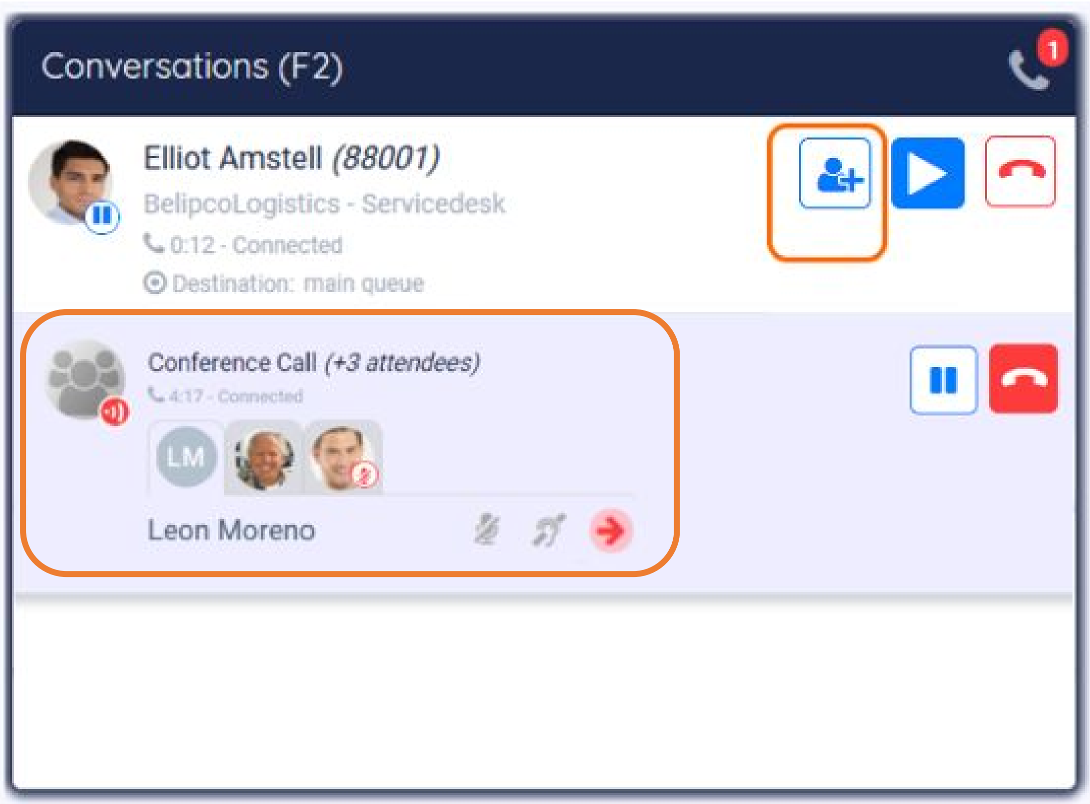
The receptionist does not show, which option has been selected. This can be indicated by the administrator.

Please note that pressing F5 or re-login is necessary, when the recording options have been changed by the administrator, while the user has still been logged in.

5.7 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.

The conference call contains a small tab for every member of the conference call. When you click on such a tab, the name of that member is displayed in 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.

Deaf 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:

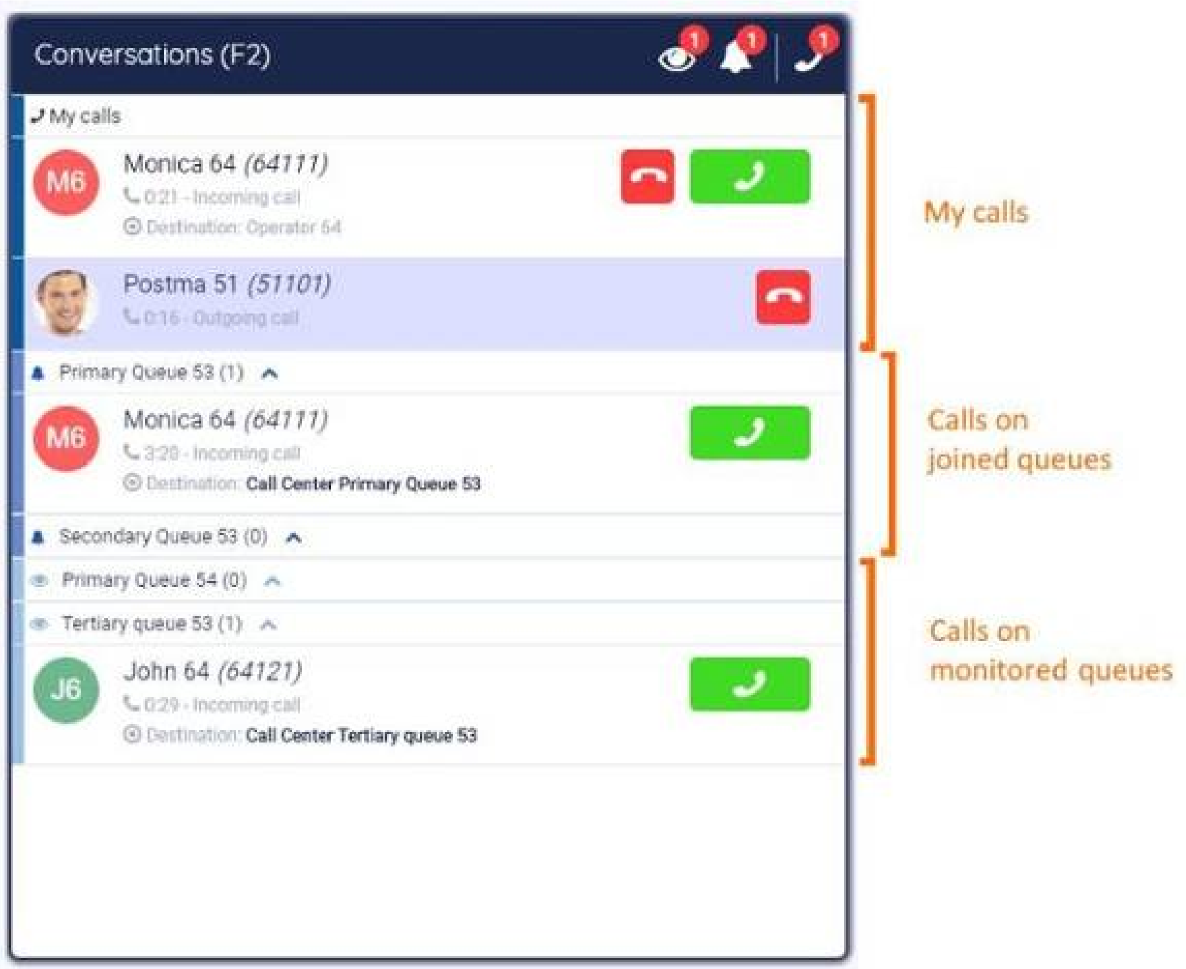
Click on the icon again to undeafen the member.

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

5.8 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**

5.8.1 Toggling visibility of all joined or all monitored queues

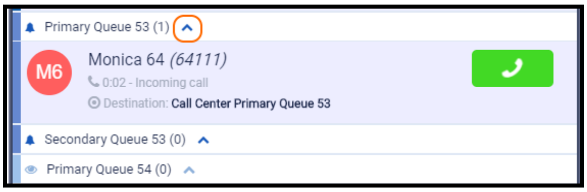
You can toggle the visibility of all joined queues simultaneously by clicking the bell icon in the F2 header.

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.

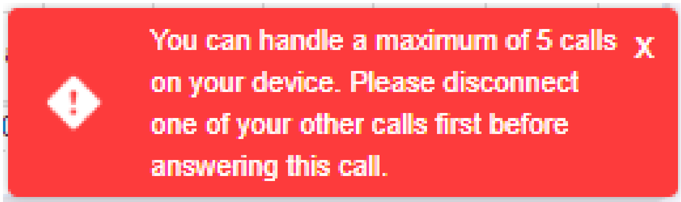
5.8.2 Toggling visibility of a single queue

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



5.8.3 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:

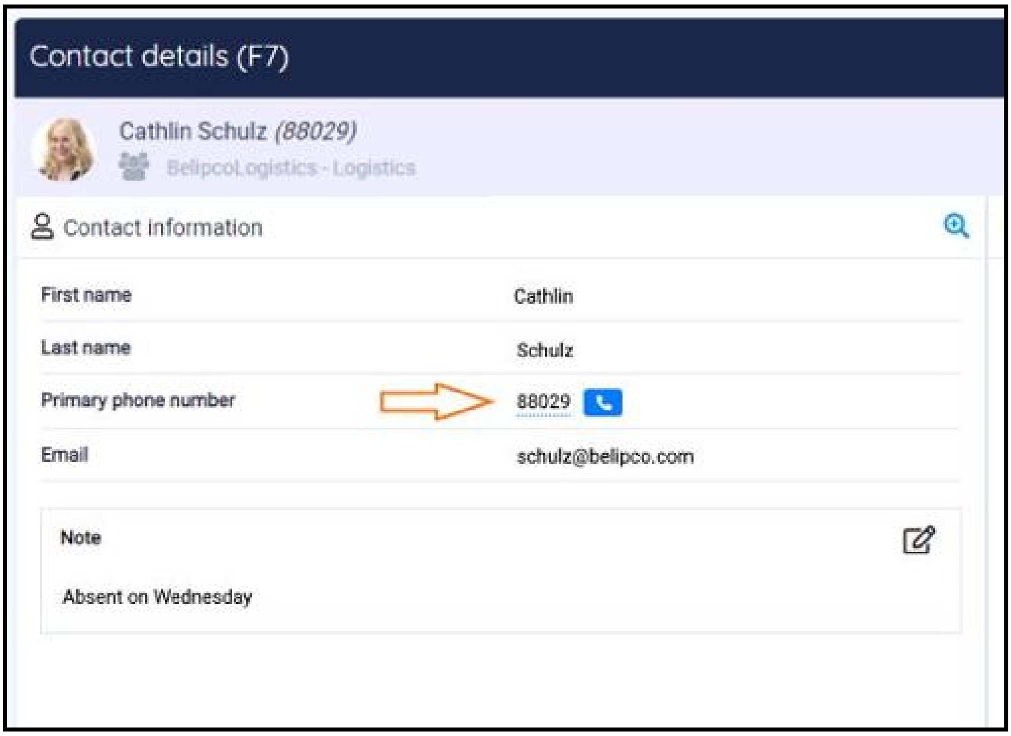


5.9 Calling or transferring to other numbers of a contact

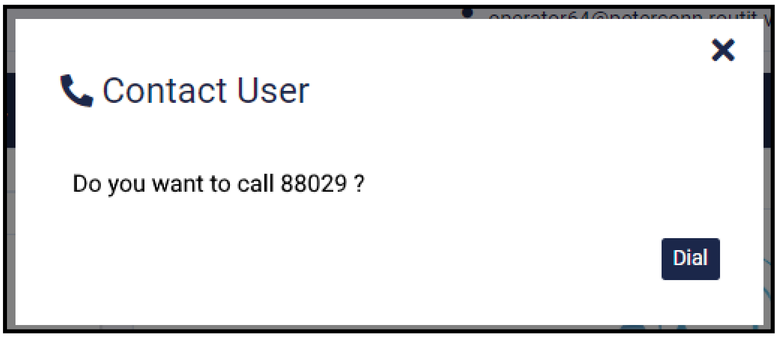
5.9.1 Calling to other numbers of a contact

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.



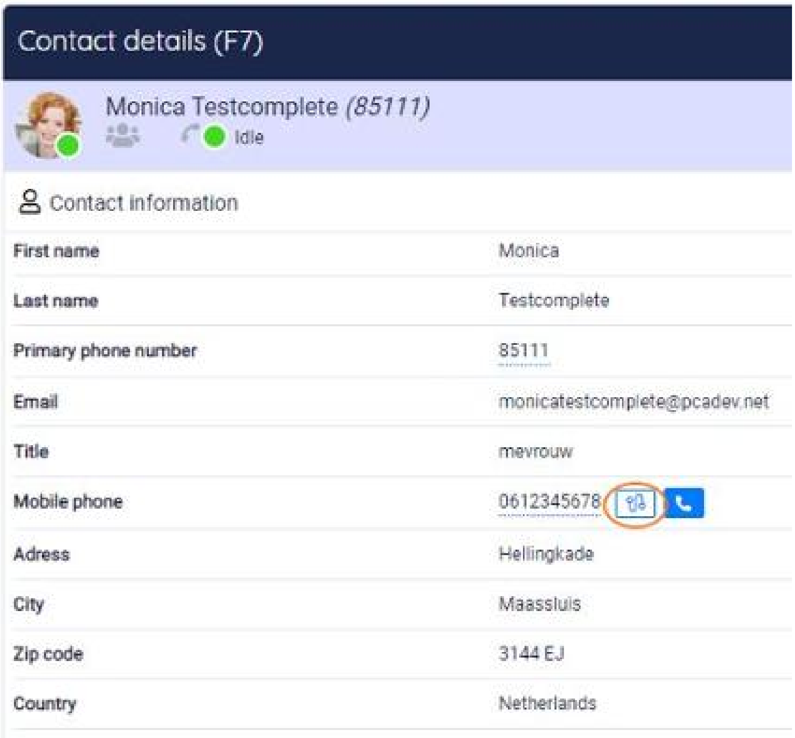
When you click on the number itself, a pop-up will be shown, asking if you want to make a call to the specified phone number:



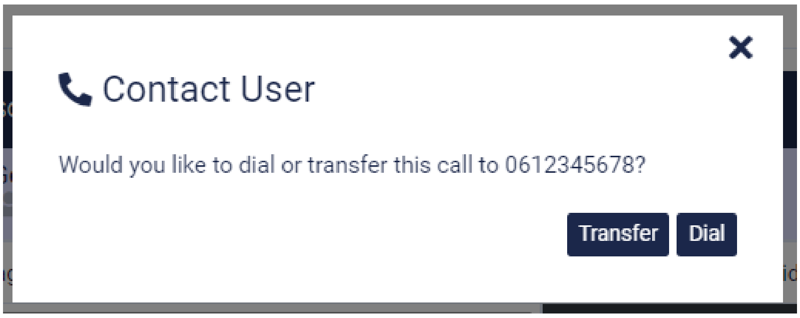
Press on 'Dial' if you want to make the call and on 'X' if you don't.

5.9.2 Transferring to other numbers of a contact

When you want to transfer a call to another number of a contact, you select that contact in the contact list and go to the contact information widget in the Contact Details. When you hover over a row that contains a phone number, a small transfer button will appear. When you click on this transfer button, the call will be transferred to that phone number.



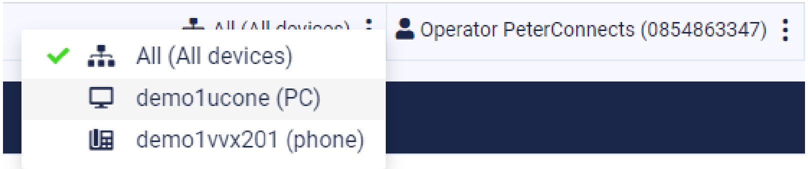
When you click on the number itself, a pop-up will be shown, asking if you want to make a call or a transfer to the specified phone number:



Press on 'Dial' if you want to make the call, on 'Transfer' if you want to transfer the call and on 'X' if you want to do nothing.

5.10 Selecting a device for calls

It is possible to select a device as primary device for answering calls and starting calls. In order to do that, you can click on the drop down in the main menu bar and select the device you want to use.



The selected device will be remembered between sessions. When you sign in in the Receptionist and your previously selected device is not available, the first device in the list will automatically be selected, and a message will be shown with the new auto-selected device.

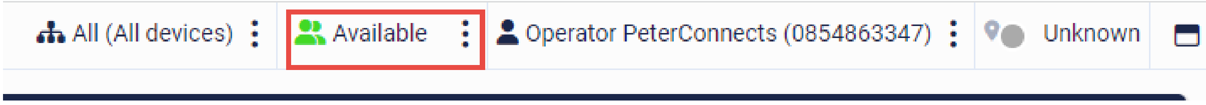
When a new device is signed in or a device is signed out, this will not be detected automatically by the Receptionist. In order to see the added or removed devices, you need to sign in again or refresh the web page in which the Receptionist runs, in order to make the changes effective.

Note: At this moment, devices that are used on a mobile phone or tablet are not included in the list of devices.

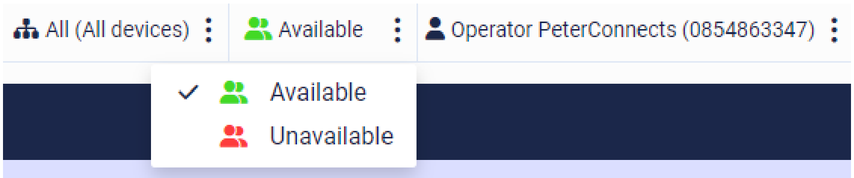
6 Receptionist status

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:

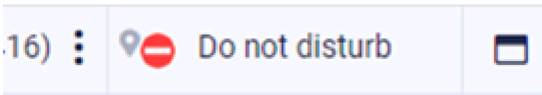


It is possible to change the state by clicking on the three dots next to the state, or on the state itself. This will open a dropdown menu where you can select other possible states. The state will be changed directly after selecting a different state.



6.2 Do not disturb

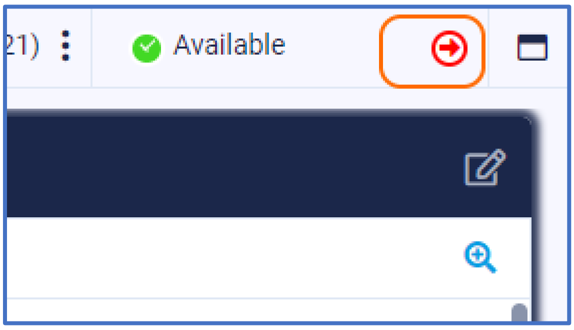
When you have "Do not disturb" switched on, it will be indicated by the do not disturb sign as follows:



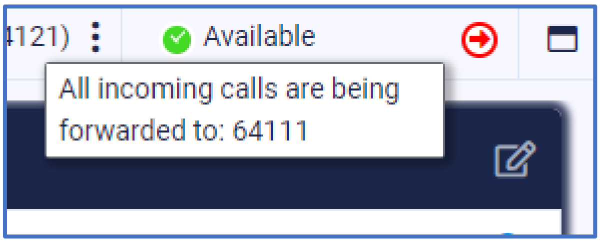
For switching the "Do not disturb" setting on or off, see the paragraph about Conversation settings in chapter [Personalizing the Receptionist].

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.

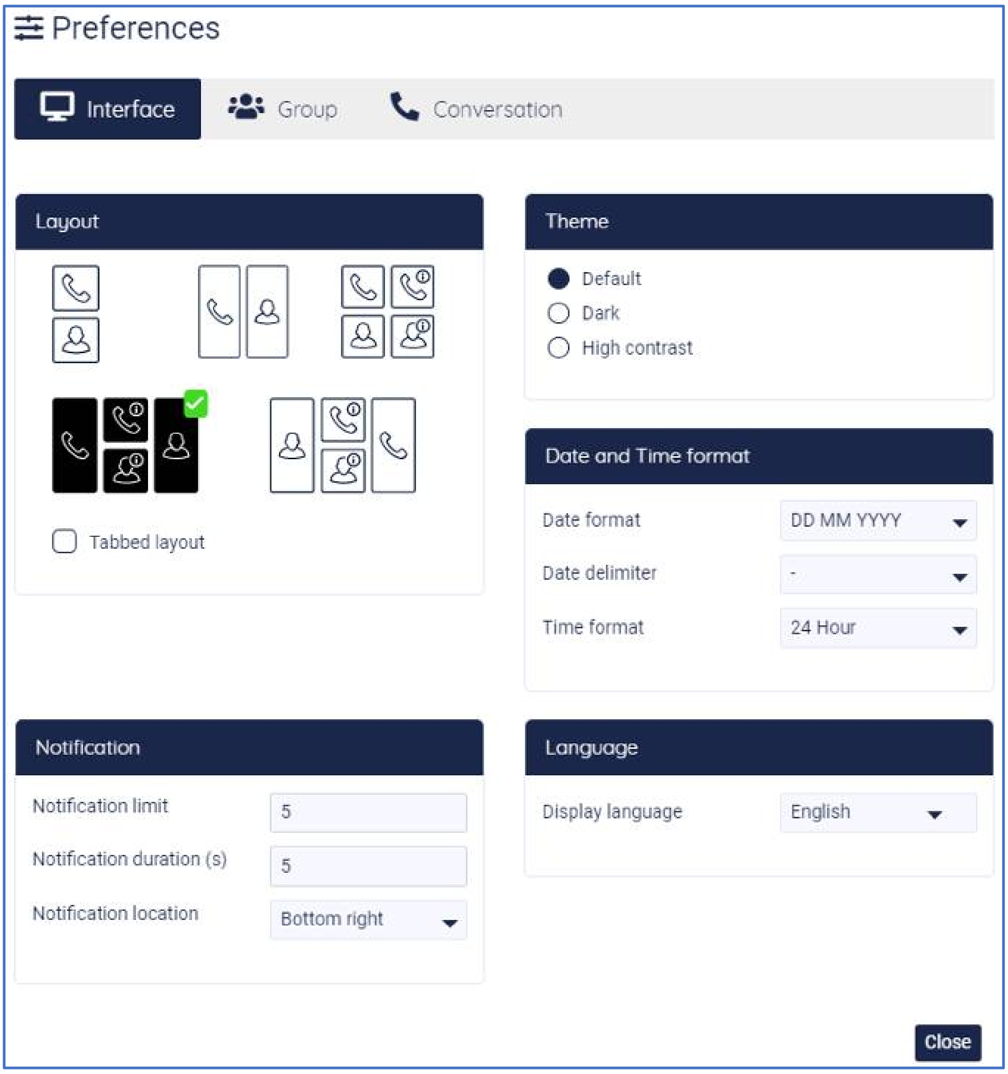
7 Personalizing the Receptionist

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

In the preferences dialog, there are several tab pages on which you can set your own personal preferences. These tab pages will be described in the next paragraphs.

7.1 Interface preferences

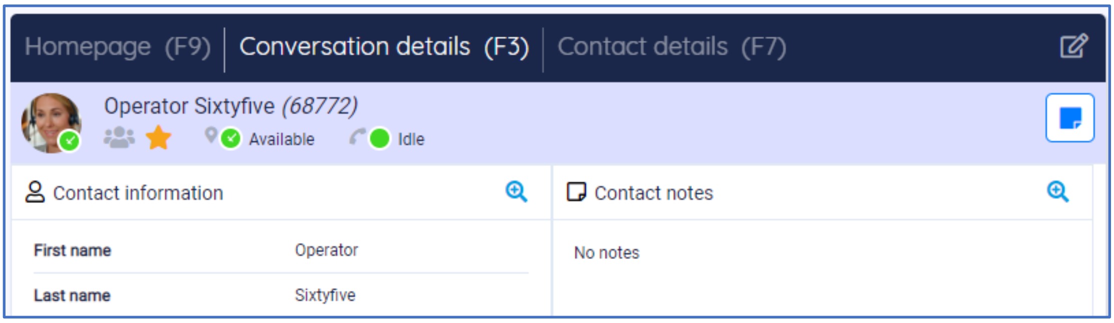
In the preferences dialog, on the Interface tab, you can select a layout, a theme, the date and time format, some notification settings and the language:



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)

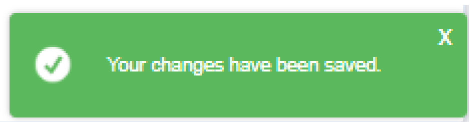
There is also an option for the tabbed layout. In this case, the Homepage, Conversation details and Contact details are displayed in tabs.



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. The Dark theme can be selected if you prefer a less bright screen.

Date and time format
The way that dates and times are shown can be customized by selecting the wanted date and time format and the date delimiter.

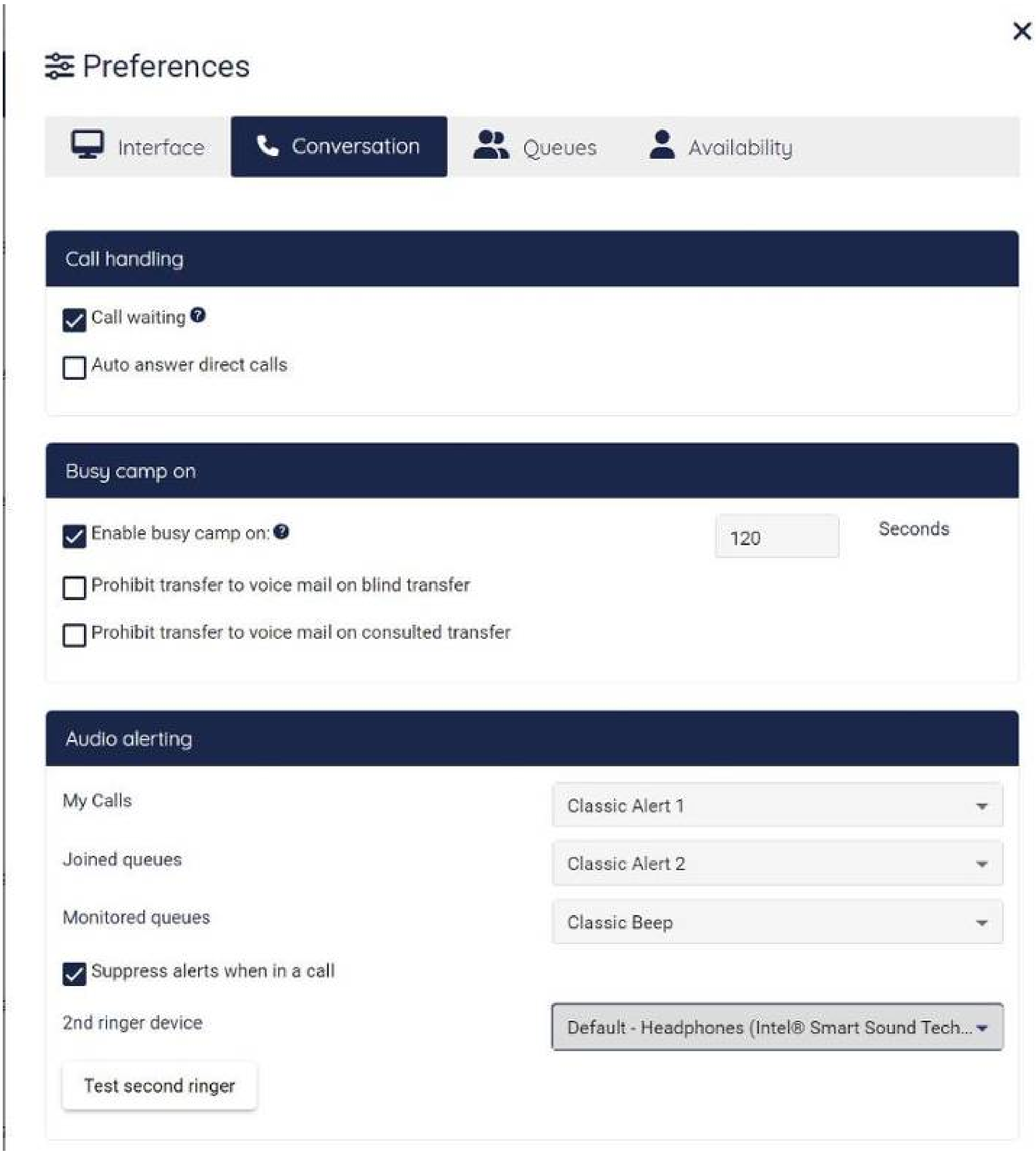
Notification
On the bottom of this screen you can select a location for popup notification messages and how many you will get maximum at one time. A notification can look like this:



Language
You can set the display language to English, Dutch, French or German.

7.2 Conversation settings

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

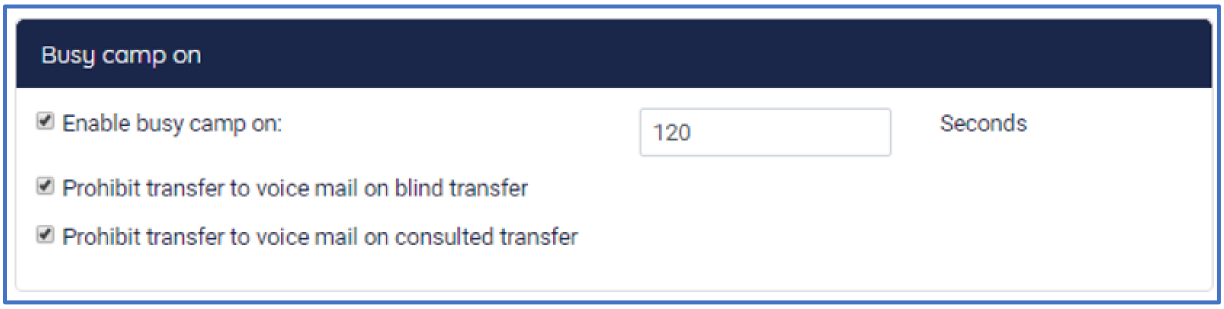


7.2.1 Call handling

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 Busy camp on

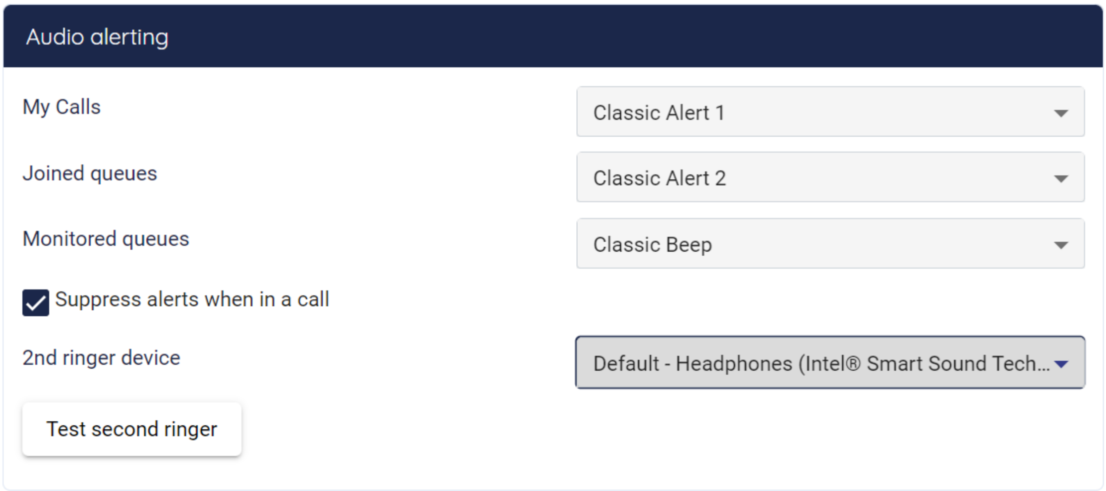


This feature allows you to camp on a call to a busy destination. You can configure the time before the call will fallback. This feature is only available in the Premium and Advanced edition.
You can also indicate whether it must be prohibited to transfer to voice mail.

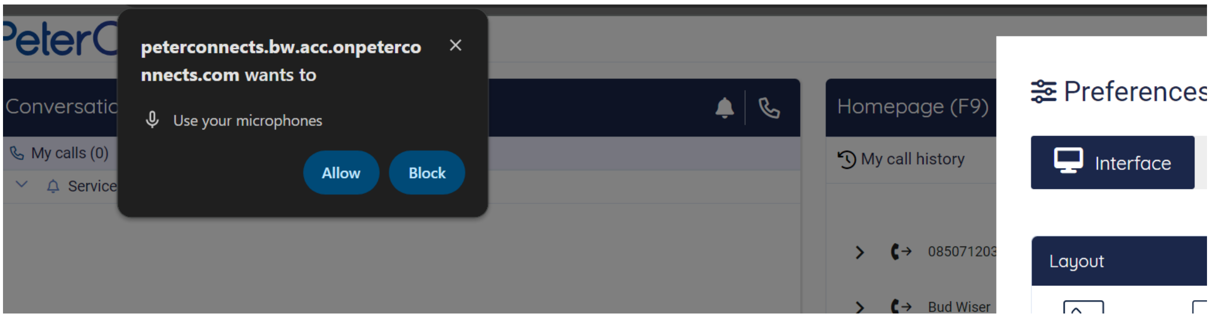
7.2.3 Audio Alerting

In this section you can set audio alerting. When audio alerting has been set, an audio signal is played when a new call comes in. The type of alerting sound can be chosen and can be different for queue calls and my calls. It is also possible to suppress alerts when you are in a call, using the checkbox ‘Suppress alerts when in a call’.

An alternative audio output can be set as the 2nd ringer device. Which is specially convenient when using ACS. The “Test second ringer” will test the audio which is set for the “My Calls”.
Setting the “2nd ringer device” to “None” will play all audio (voice and ringer) on the selected audio output of your computer.

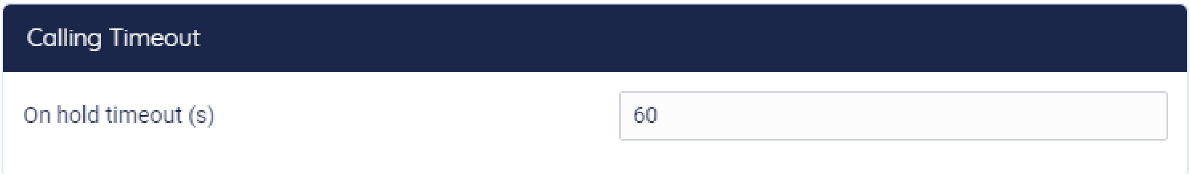


Note :Be aware that additional consent needs to be provided to your browser to get access to the microphone when opening the preferences.



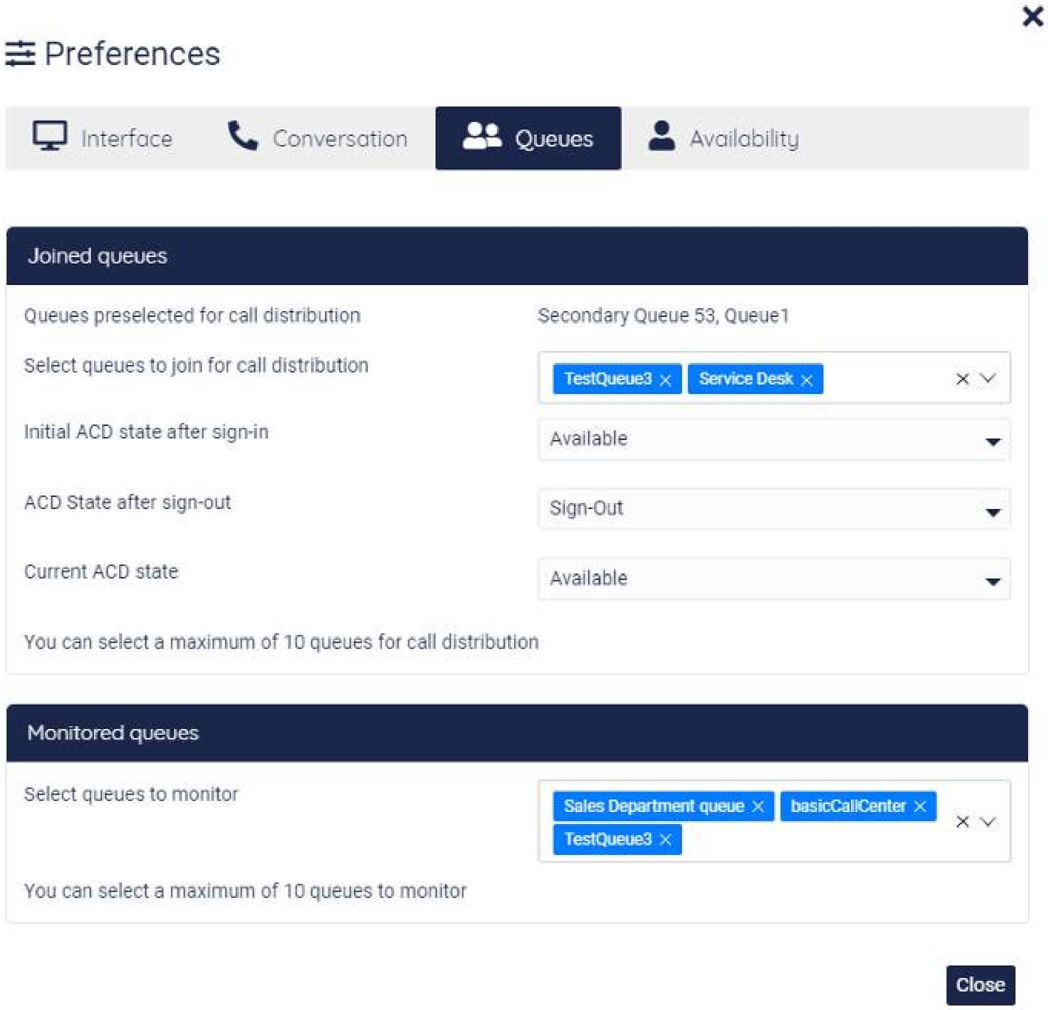
After that it will show red notification the browser tab showing that you audio being set the attendant.

7.2.4 Calling timeout



In the section "Calling timeout", you can set the amount of seconds for the on hold timeout. When the on hold time of a call exceeds the amount of set seconds, the line of the call that shows the on hold time and status starts blinking.

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.

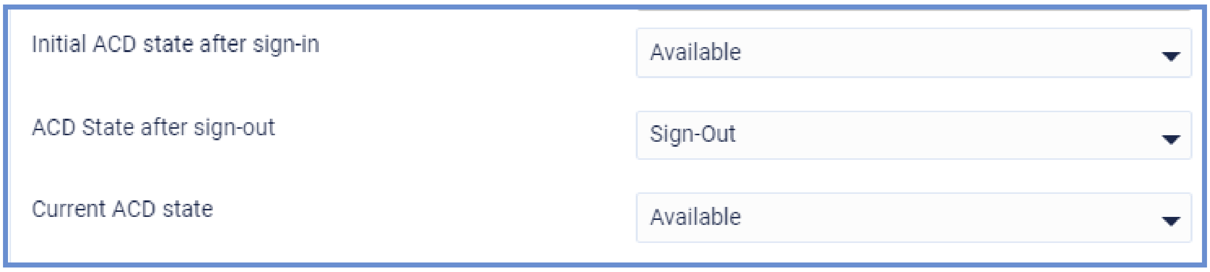
You can select a maximum of 10 queues to join.

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.

Some queues might be preselected for you by an administrator. These will be displayed as “Queues preselected for call distribution”.

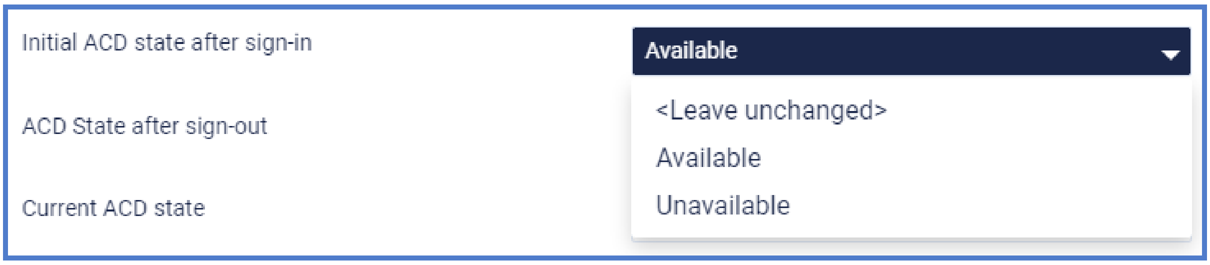
7.3.1.1 ACD state

For the joined queues, you can set the initial ACD (Automatic Call Distribution) state after sign-in, the ACD state after sign-out and the current ACD state:



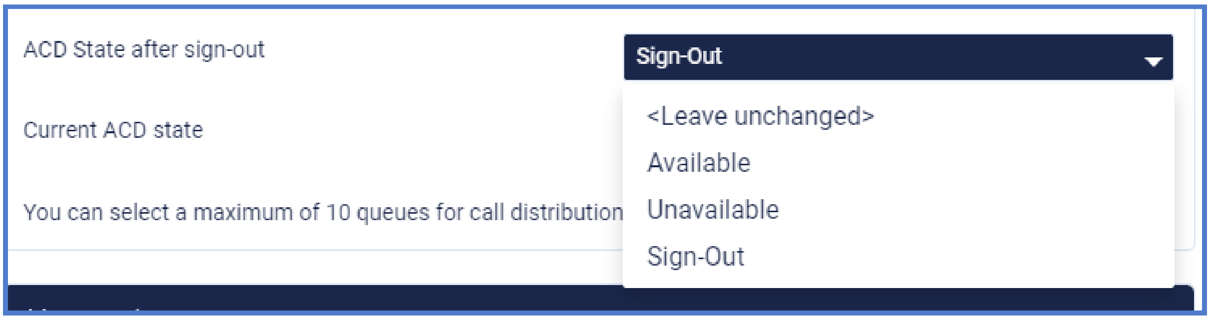
The initial ACD state after sign-in is the ACD state directly after login into the Receptionist. You can configure it to be set on:

- <Leave unchanged> (do not change after login)
- Available (change it to 'Available' after login; this is the default behaviour)
- Unavailable (change it to 'Unavailable' after login)



The ACD state after sign-out is the ACD state after you have logged out. You can configure this to be set on:

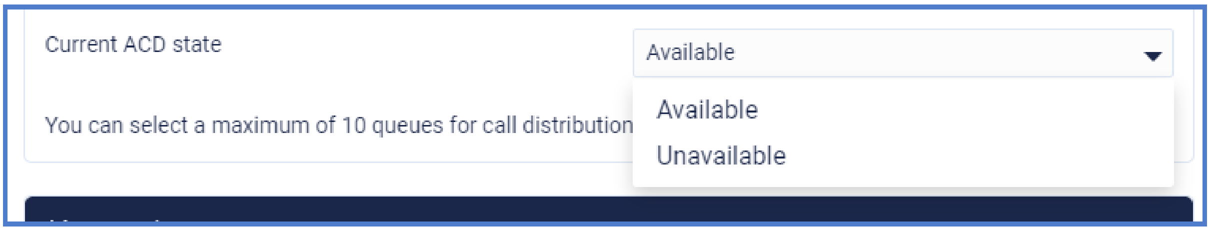
- <Leave unchanged> (do not change after log out)
- Available (change it to 'Available' after log out)
- Unavailable (change it to 'Unavailable' after log out)
- Sign-Out (change it to 'Sign-Out after log out; this is the default behaviour)



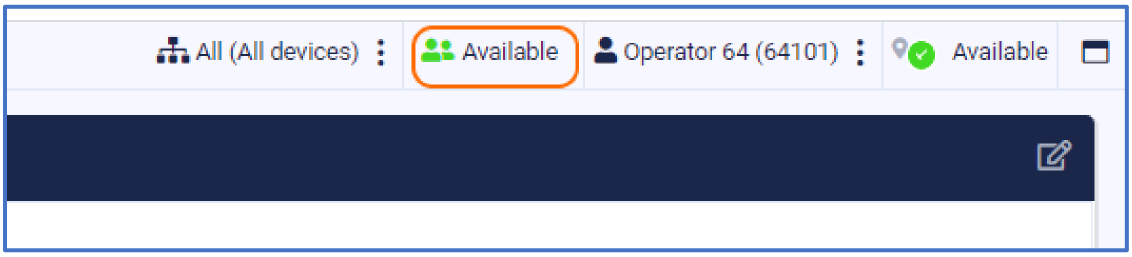
With the current ACD state you can change your ACD state temporarily during your session.

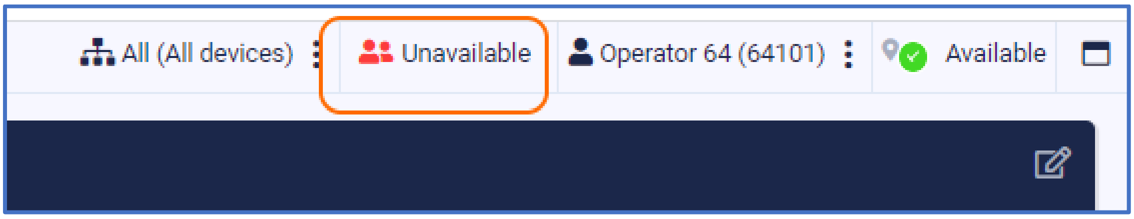
You can configure your current ACD state to:

- Available
- Unavailable



The current ACD state is also shown in the main menu of the Receptionist:

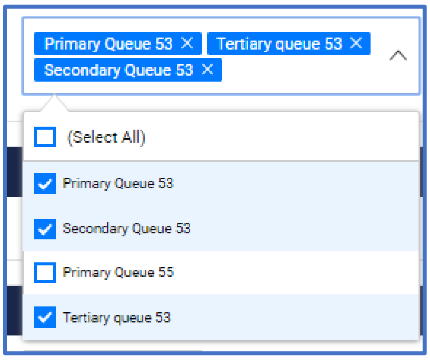




When your ACD state is ‘Available’, incoming calls on the joined queues will also ring on your phone.
When your put your ACD state to ‘Unavailable’, incoming calls on the joined queues will not ring on your phone.

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.

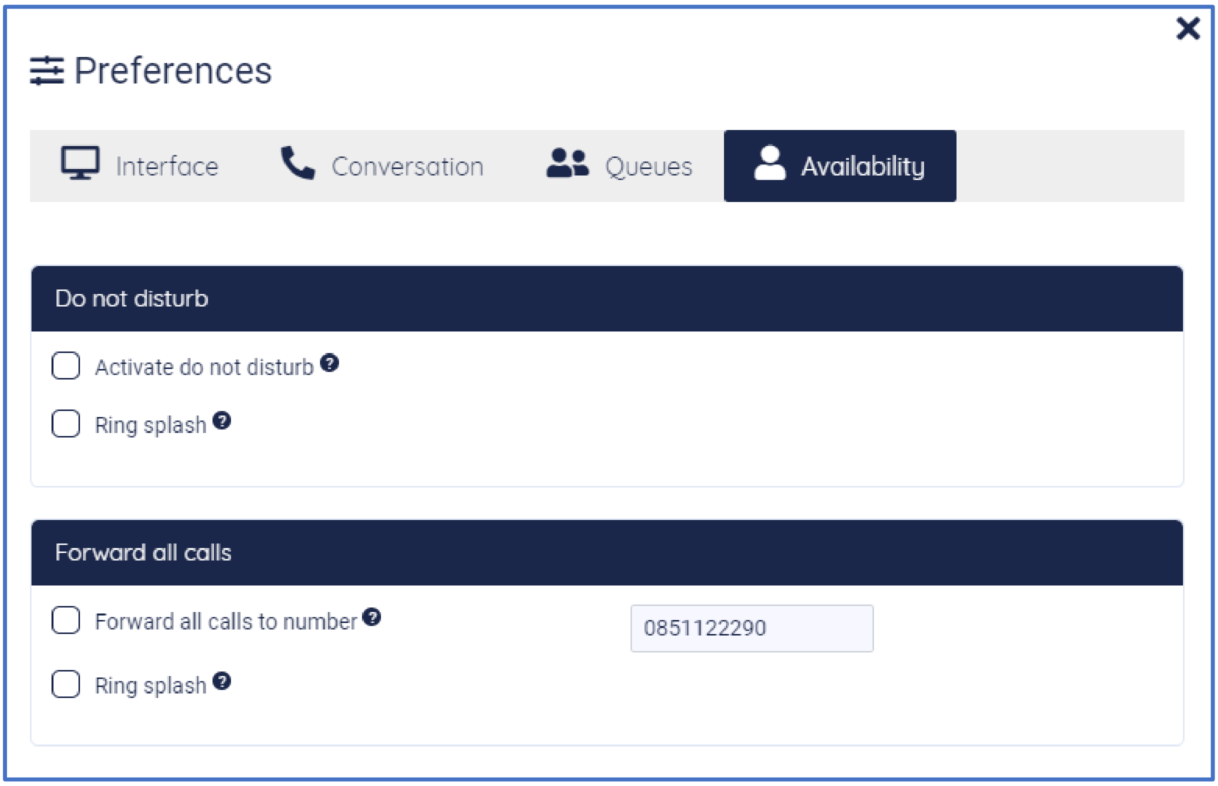


You can select a maximum of 10 queues to monitor.

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 Availability

On the tab 'Availability' you can set the availability of the receptionist, regarding 'Do not disturb' and 'Forward all calls'.



7.4.1 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.

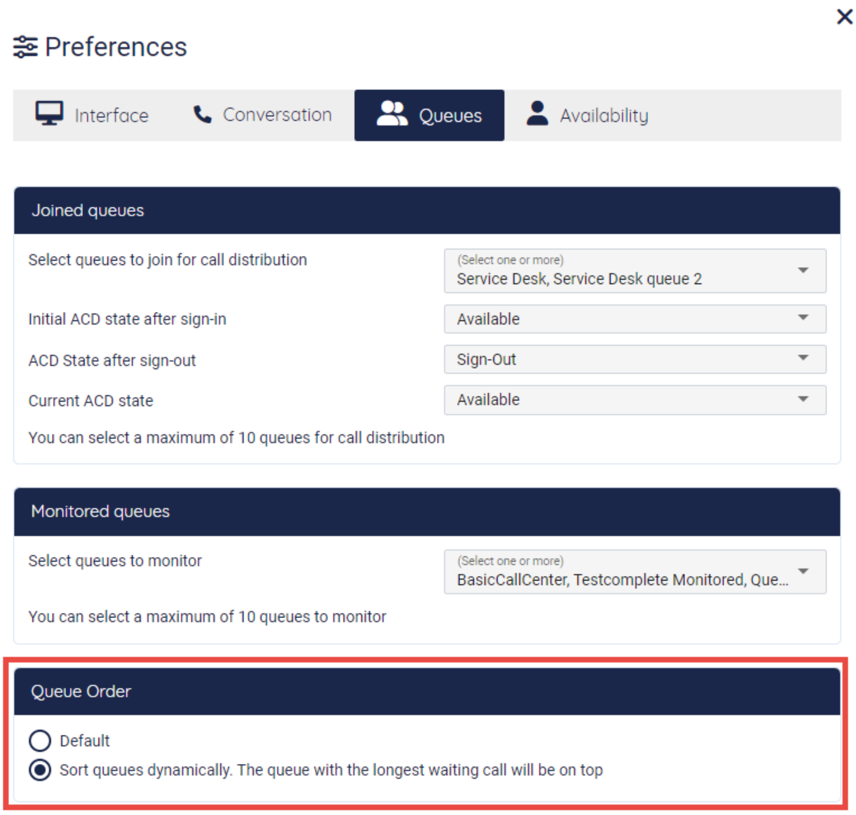
7.4.2 Forward all calls

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.

8.3.3 Dynamic queue ordering

An option in the preferences is added to enable dynamic queue ordering in F2. There are 2 options:

- Default: no change in existing behavior, so no dynamic sorting
- Sort queues dynamically

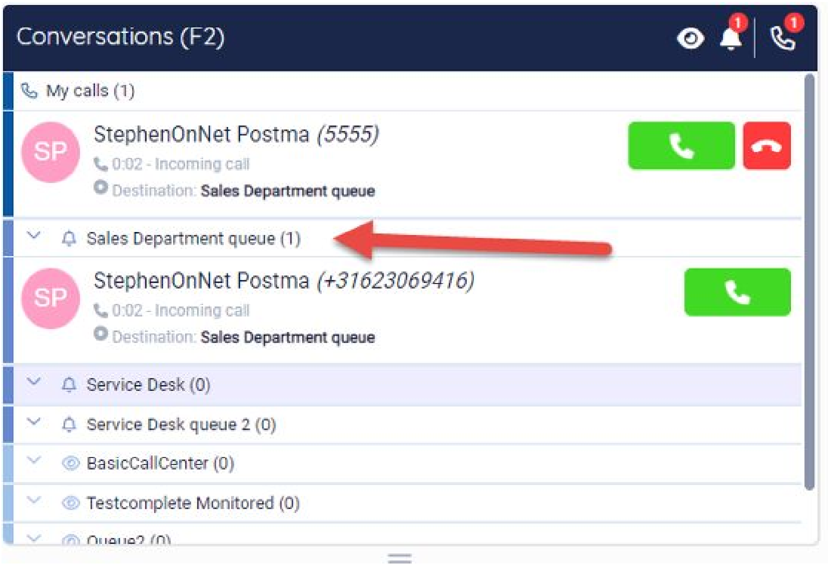


Business rules:

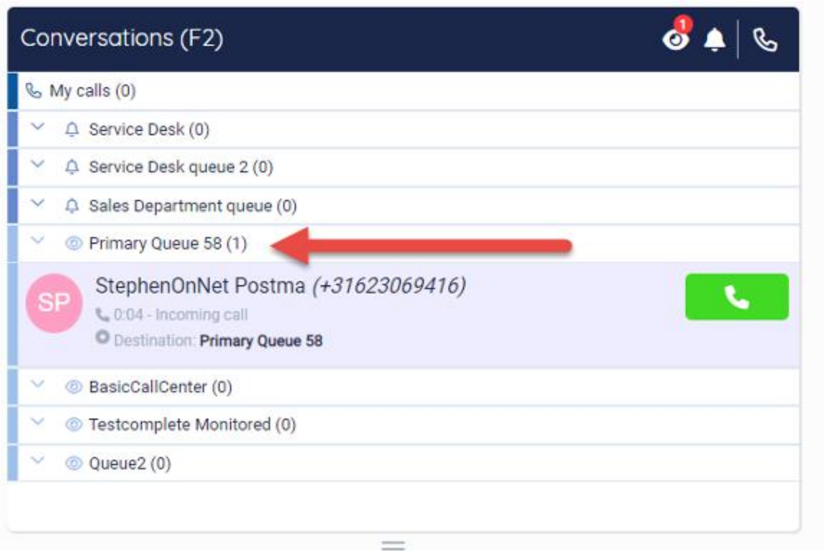
- Joined Queues are always shown above the Monitored queues
- Longest ringing call in a joined queue will show on top.
- Longest ringing call in a monitored queue will show on top of the monitored queues list.

For the receptionist user it looks like this. No calls:

Call on Joined queue ‘Sales department queue’, queue moves to top.



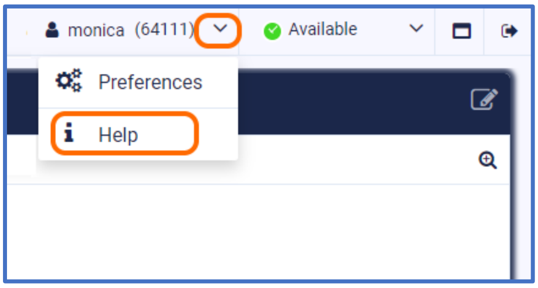
Call incoming on Monitored queue ‘Primary Queue 58’, queue moves to top of monitored queues

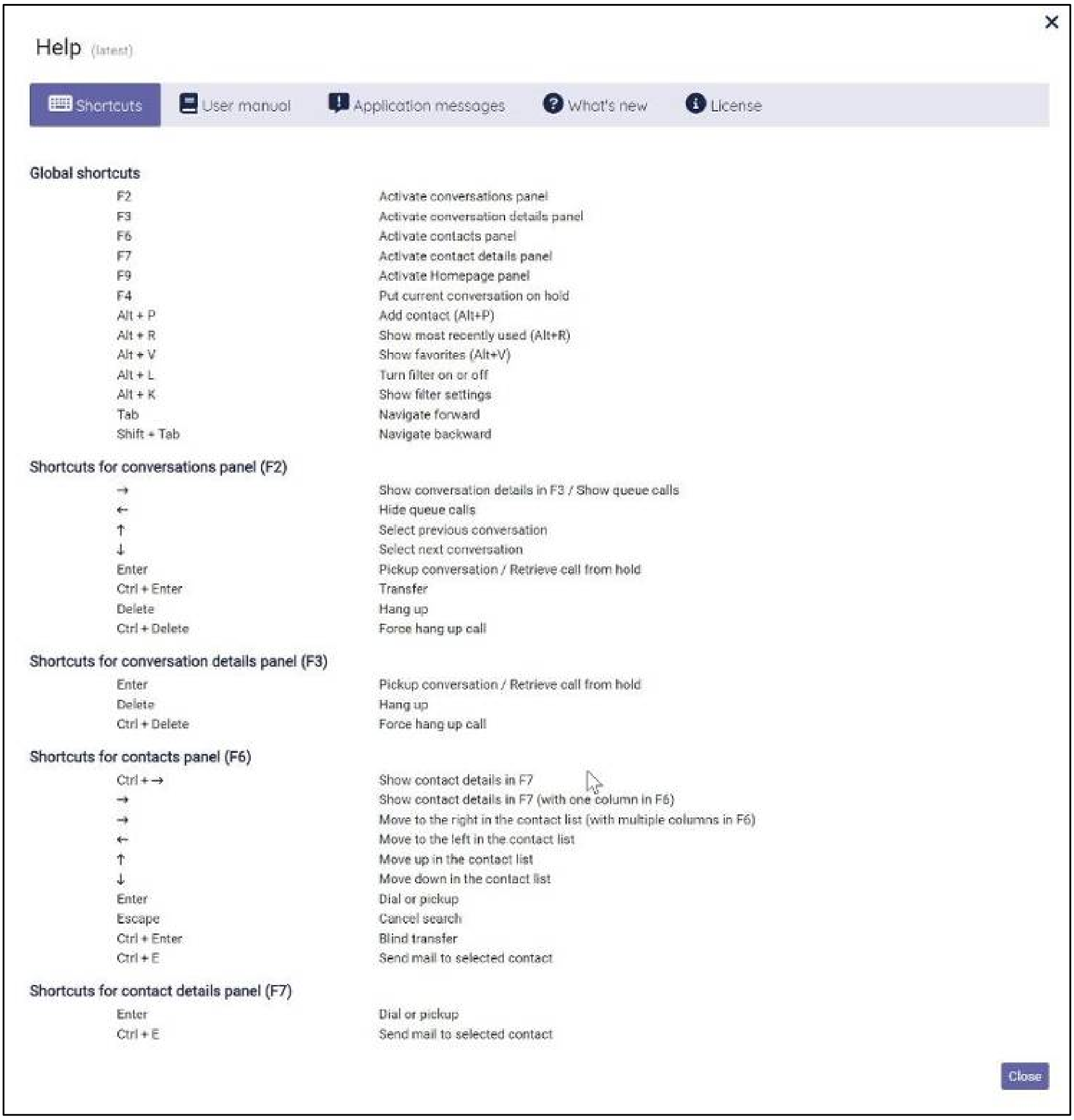

Conversations (F2)
1
My calls (0)
Service Desk (0)
Service Desk queue 2 (0)
Sales Department queue (0)
Primary Queue 58 (1)
SP
StephenOnNet Postma (+31623069416)
0:04 - Incoming call
Destination: Primary Queue 58
BasicCallCenter (0)
Testcomplete Monitored (0)
Queue2 (0)

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:



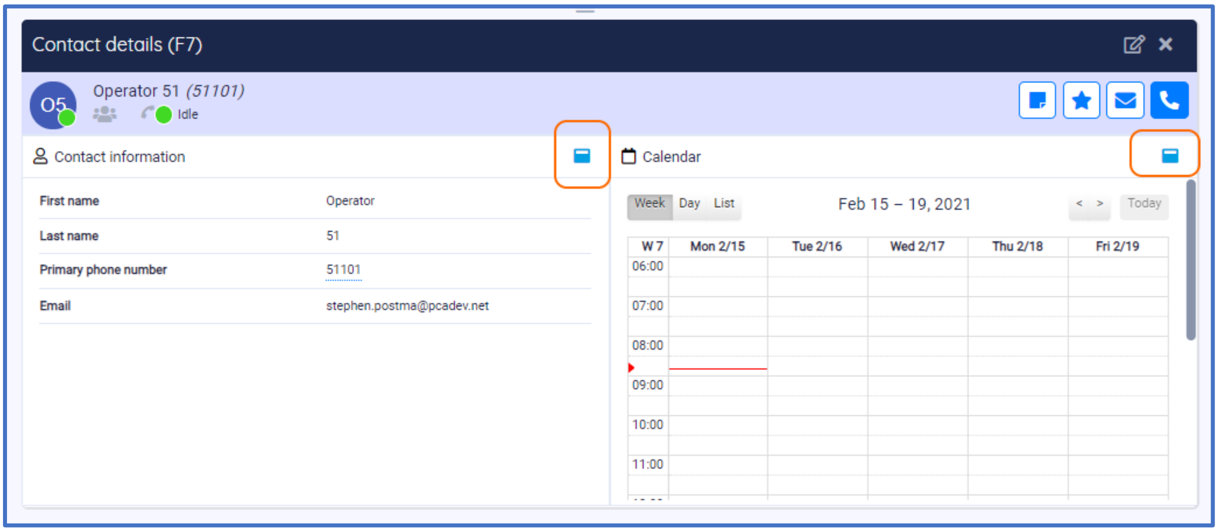

Help (latest)
Shortcuts
User manual
Application messages
What's new
License
Global shortcuts
F2 Activate conversations panel
F3 Activate conversation details panel
F6 Activate contacts panel
F7 Activate contact details panel
F9 Activate Homepage panel
F4 Put current conversation on hold
Alt + P Add contact (Alt+P)
Alt + R Show most recently used (Alt+R)
Alt + V Show favorites (Alt+V)
Alt + L Turn filter on or off
Alt + K Show filter settings
Tab Navigate forward
Shift + Tab Navigate backward
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
Ctrl + Delete Force hang up call
Shortcuts for conversation details panel (F3)
Enter Pickup conversation / Retrieve call from hold
Delete Hang up
Ctrl + Delete Force hang up call
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 Maximizing and restoring

You can maximize a widget within its containing panel by clicking on the maximize button:

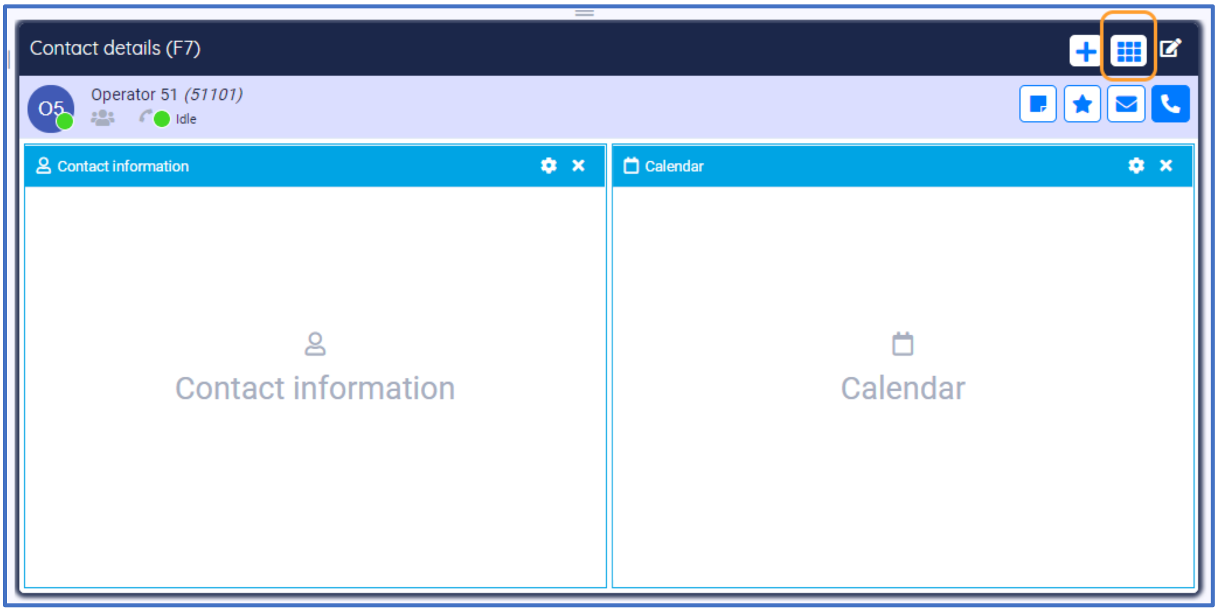


And you can restore the widget again by clicking on the minimize button:

Note that the maximize button is not shown when there is only one widget in the panel, because when there is only one widget, it is already maximized to the contents of the panel.

9.2 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.

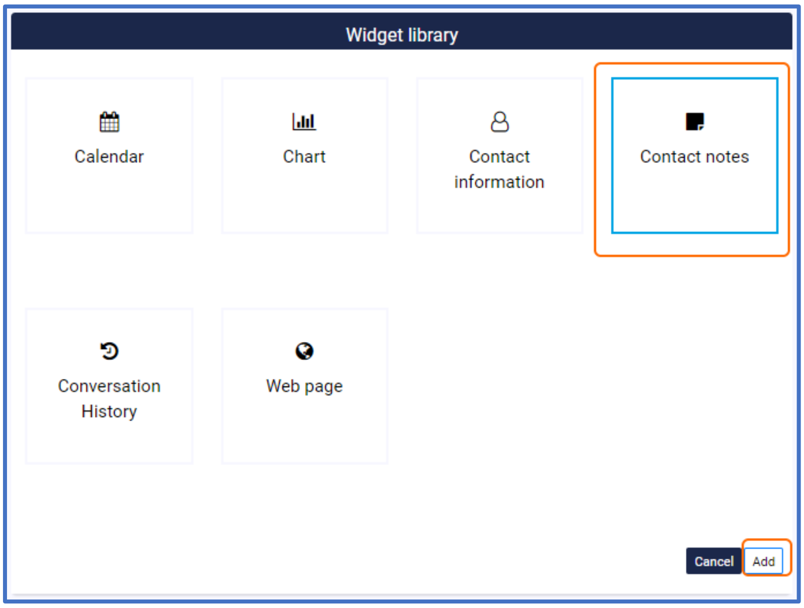
Note that the content of the widgets is not shown in edit mode. The content will be shown again when you stop editing the widgets.

9.3 Adding a widget

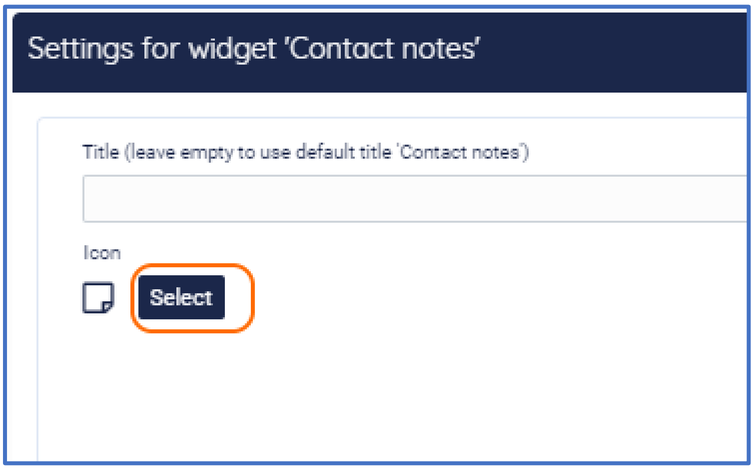
In the edit modus of the widgets, click on the button 'Add a widget': 

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.*

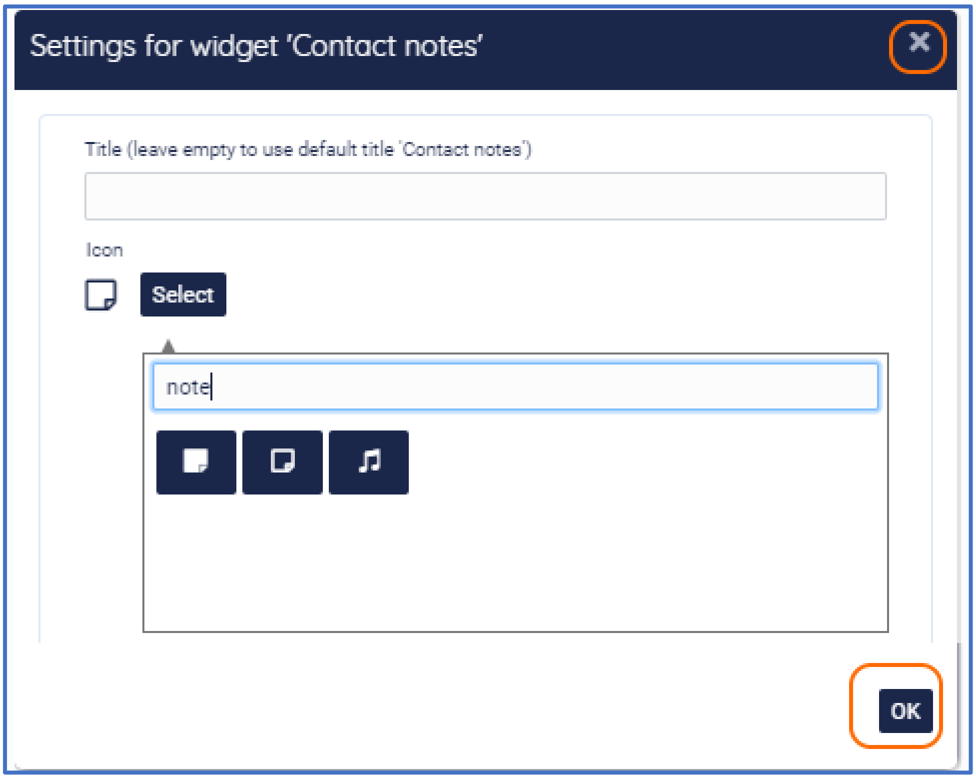


Select a widget and click on the button “Add”. After adding a widget, you can configure it.



At least you can edit the title and the icon. The title is not mandatory. If you leave the title empty, the default title will be used. This default title will also automatically be translated, when you select another language via ‘Preferences’. When you do enter a title, that title will override the default title and will not automatically be translated, when another language is selected.

If you want to change the icon, you can click on the ‘Select’ button 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'.

Some widgets require more configuration. Those will be described in the next paragraph.

Click on 'OK' to add the widget. Click on 'X' to exit the settings screen.

You can change the configuration of widgets that had already been added by clicking on the 'Configure widget' button .

Exit the editing of the widgets by clicking on the 'Stop editing' button .

9.4 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:

[CLI]	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.

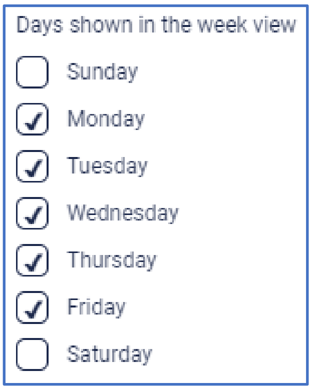
[LANG]	This tag will be placeholder for the currently selected language in the Receptionist. The following placeholders are provided: en = English, fr = French, nl = Dutch, de = German, es = Spanish, da = Danish
[THEME]	(Only for the Webpage widget) This placeholder will be replaced with the name of the current theme, e.g. standard, dark, high contrast.
[DESTINATION]	(Only for the Webpage widget) This tag provides information about the called destination.
[CONTEXT]	(Only for the Webpage widget) This tag provides information about the caller and the user of the Receptionist.

9.5 Overview of all widgets

9.5.1 Calendar widget

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.

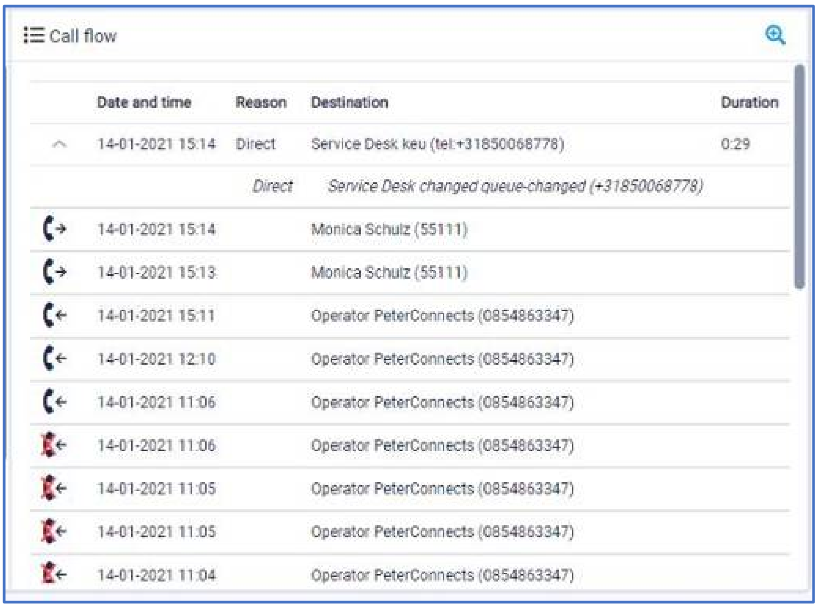
The days of the week, that have to be displayed in the calendar in the week view mode, can be chosen in the configuration of the widget.



9.5.2 Call flow widget

This widget shows all the destinations of the current incoming call, as well as the call history of that caller.

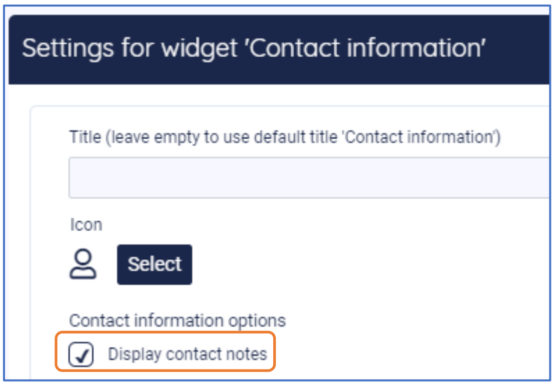
It also shows previous calls up to a certain number of calls.



9.5.3 Contact information widget

This widget shows the basic contact information for the selected contact. Note that for contacts from some platforms, "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.

In the configuration it can be indicated, whether the contact notes should be displayed in this widget or not.



9.5.4 Contact note widget

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.

9.5.5 Homepage widget

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

9.5.6 My call history widget

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

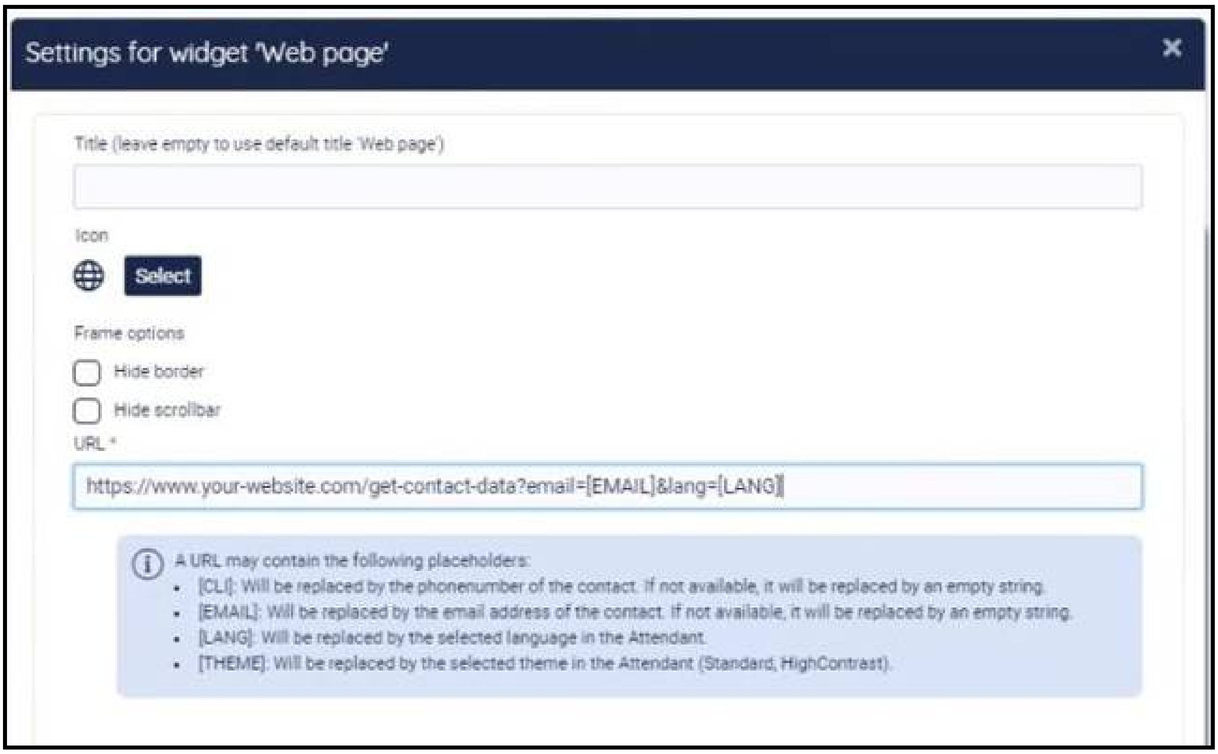
9.5.7 Twitter widget

This widget shows the timeline of a Twitter user. The Twitter widget can be added to the homepage. In the configuration of the widget, the Twitter screen name has to be entered. This can be only the screen name, the screen name preceded by '@' or the Twitter URL. These will all be converted into the screen name.

9.5.8 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 of the page to embed:



In the frame options, it can be configured whether the border of the widget and/or the scrollbar of the page should be visible.

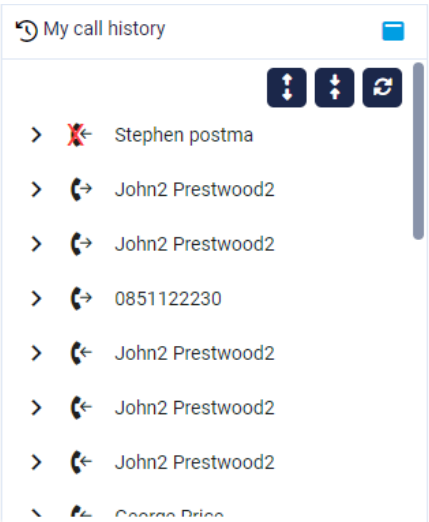
Technical notes:

- The URL is mandatory. When you enter a url without a prefix (‘http://’, ‘https://’, or ‘ftp://’), the prefix ‘https://’ will be added automatically when you save the configuration.
- 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

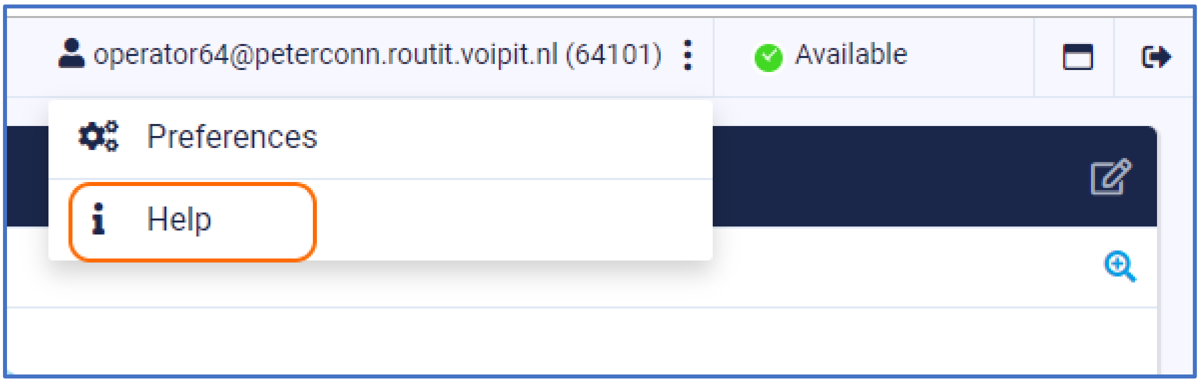
1.1.1. Auto refresh of call history on homepage

The call history widget refreshes automatically. Newly handled calls are automatically added to the call history widget after hanging up or after a 30 seconds auto refresh period.



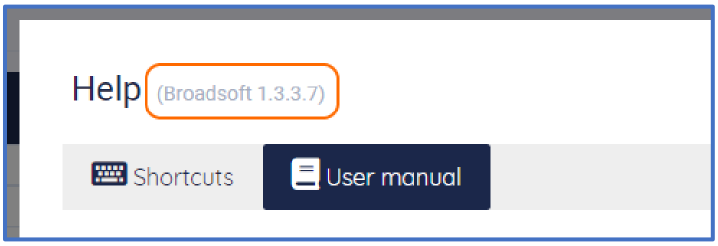
10 Help function

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.

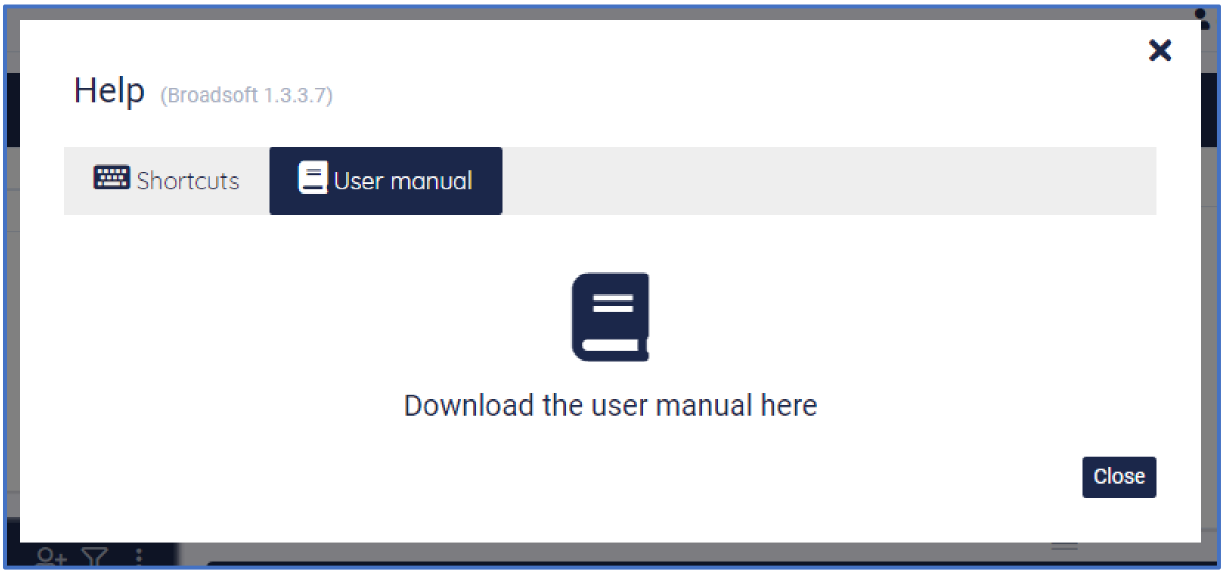


10.2 Keyboard shortcuts

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

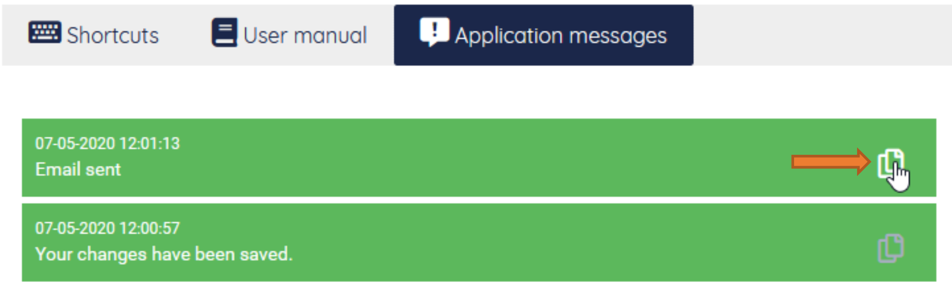
10.3 User Manual

On tab page 'User Manual' of the Help menu you can download the user manual.



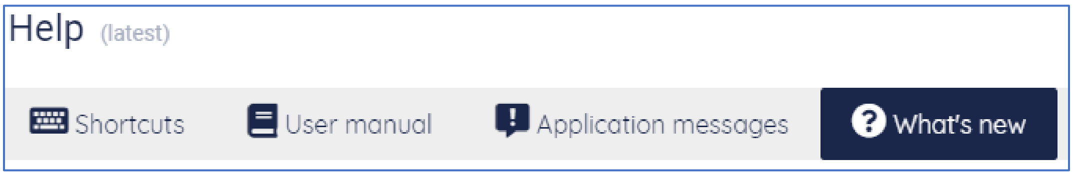
10.4 Application messages

On the tab ‘Application messages’ all toast messages are listed. The notifications can be copied with the ‘Copy’ button.



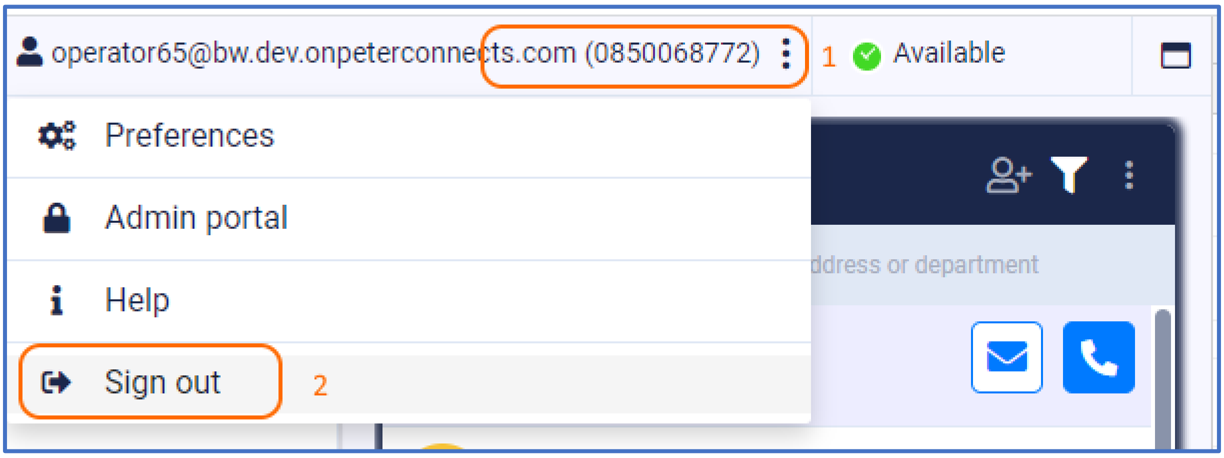
10.5 What’s new

On the tab 'What's new', new features of the application are mentioned, belonging to the version of the application you are using. When you open the application with that version for the first time, the 'What's new' tab will automatically be shown.



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:

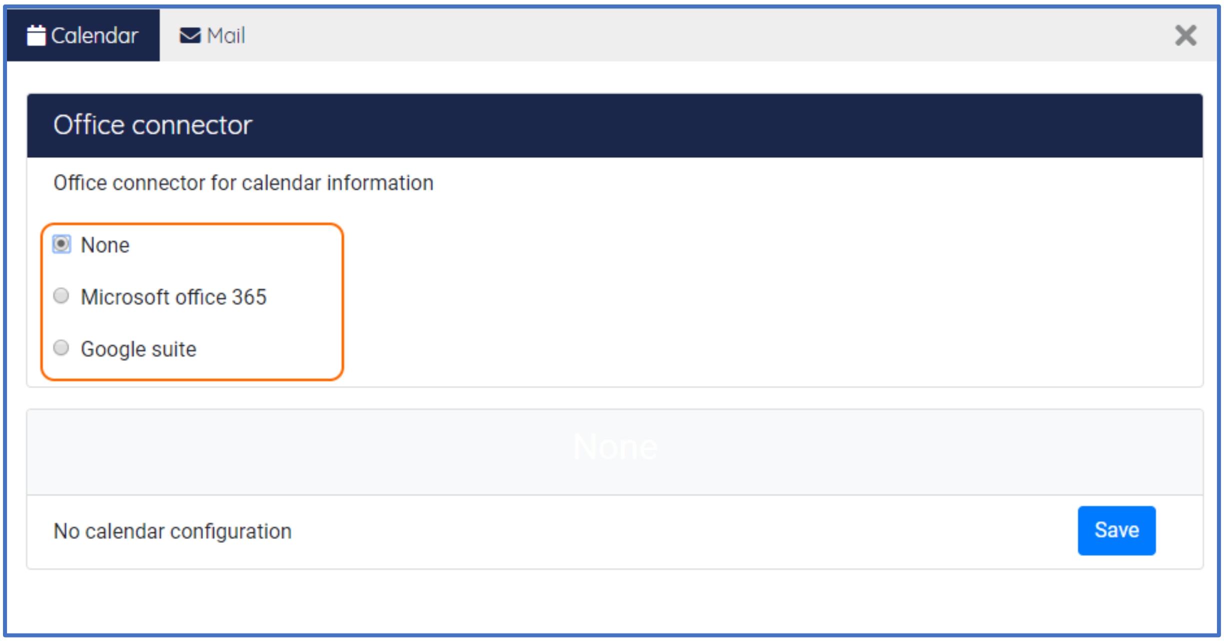
In the Admin portal, you can enter some central configuration for the application. This configuration applies to all users of the Receptionist. The following paragraphs describe the configuration, that can be made.

12.1 Calendar

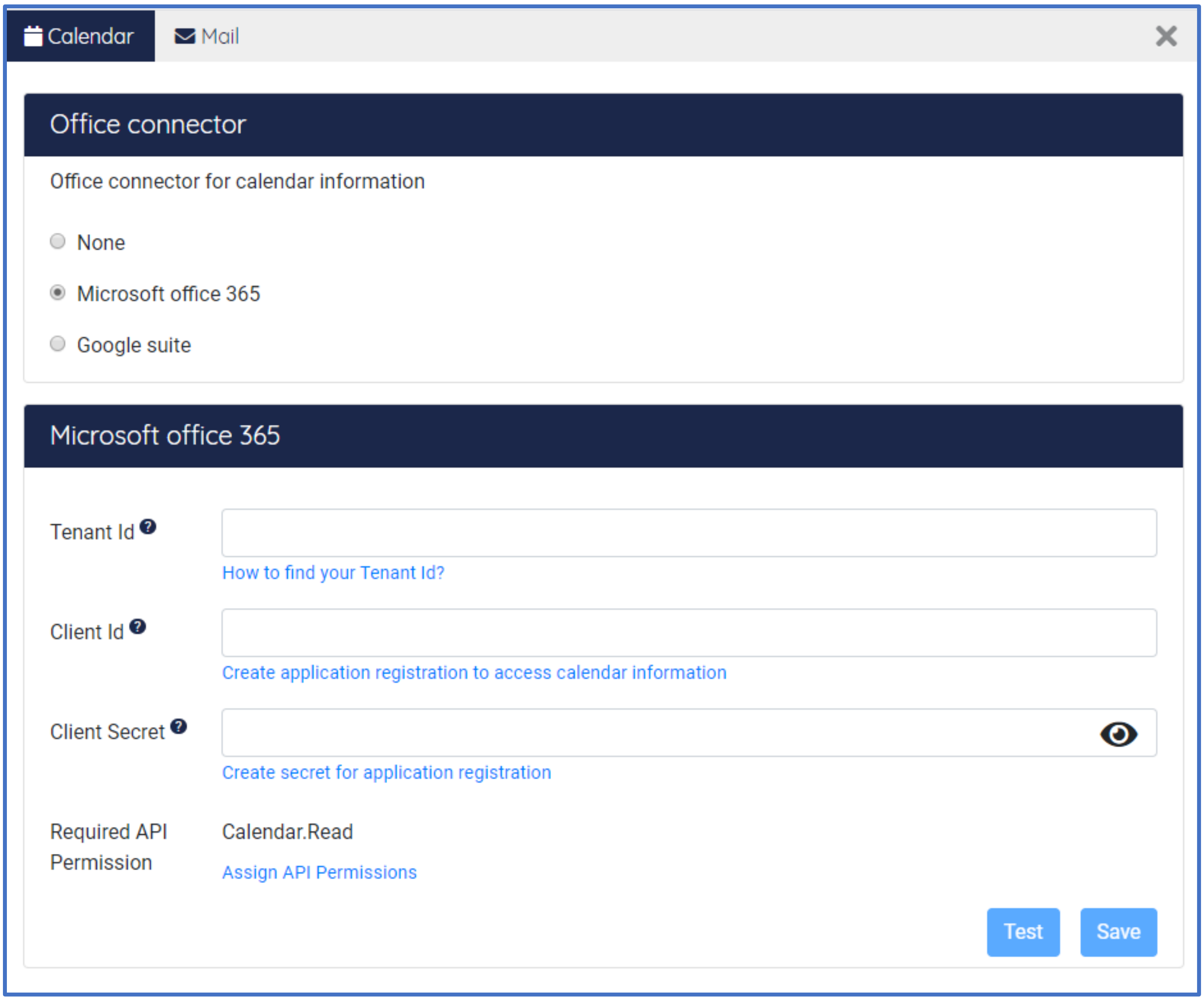
The Receptionist contains a calendar widget, that displays the calendar of the selected contact. This widget needs some central configuration before it can fetch the data of the calendar. That configuration is done in the Admin portal on the Calendar page.

note: this configuration is not available for the Receptionist that uses the Microsoft login, see the section describing the login options.

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



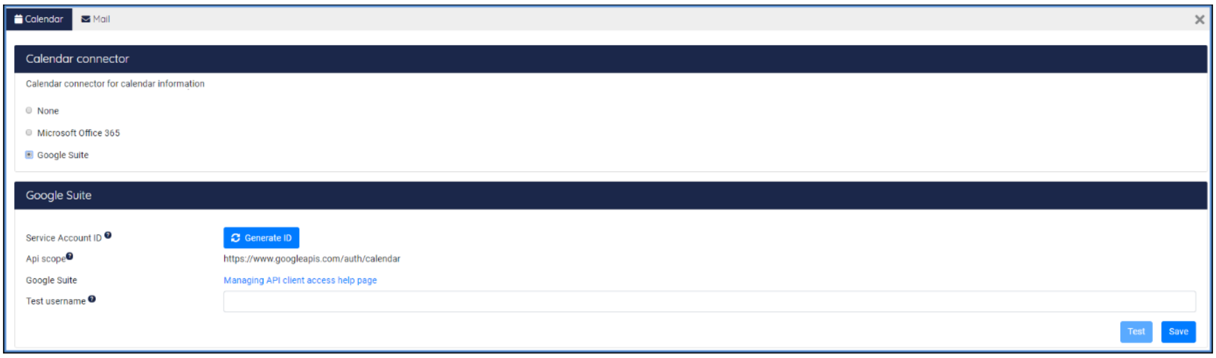
In this screen you can setup a connector for Microsoft Office 365.

To be able to read the calendars of your users, there needs to be an Application Registration in your Azure Tenant. After creating this App, you can fill in the Tenant Id, Client Id and Client Secret.
The field Required API Permission shows the permission you should assign to this app.
Be sure to assign *application permissions* (and not *delegated permissions*).

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.

Note: If you configured the Google Calendar settings in the Admin portal, but the user still does not see the calendar events in the calendar widget, please check if the user has a valid email address that has enough rights to read the calendar of the selected contact.

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 add 1 or more additional destinations to which the e-mail is being sent as a blind copy (Bcc). This can be done on the tab Mail of the Admin portal.

Add CC address on email settings

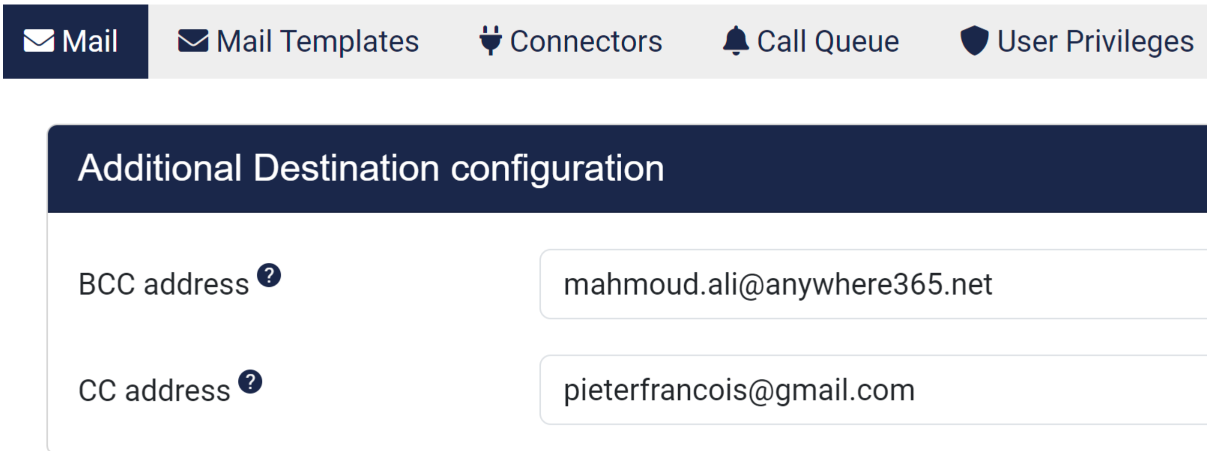
In addition to the existing blind copy (Bcc) feature in the email settings, users now have the capability to designate additional recipients for email copies directly through the Admin Portal's mail configuration. This enhancement allows for a more versatile distribution of correspondence.

Key Features:

Multiple Recipients: Users can specify one or more email addresses to receive a copy of the emails sent to contacts.

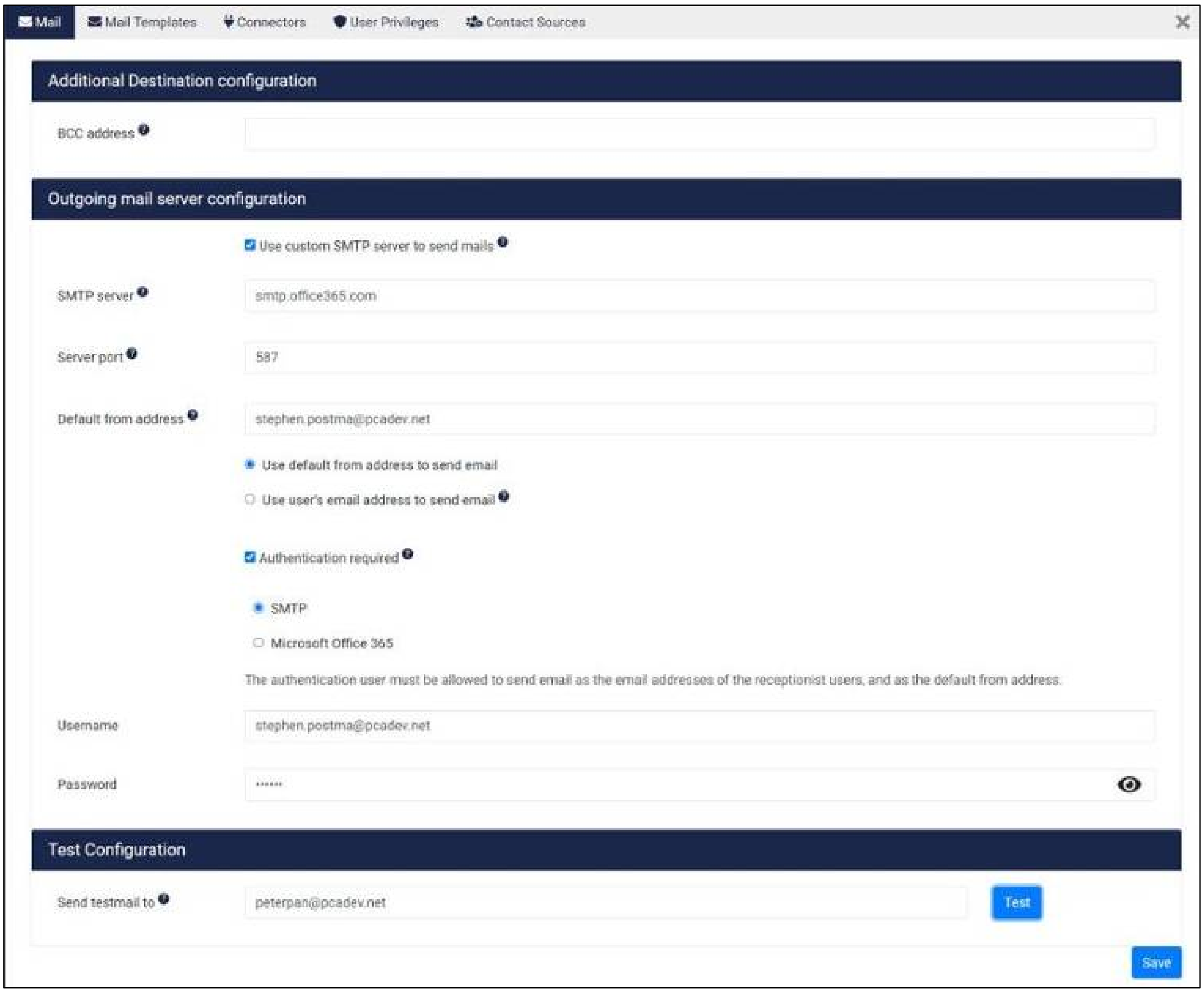
Easy Separation: Separate multiple email addresses using a semicolon (;) to ensure clear delineation of recipients.

Automatic Copying: Any email dispatched to a contact will concurrently be sent as a copy to the specified addresses in the Admin Portal's mail configurations.



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

12.2.1 SMTP Authentication



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.

- **SMTP:** When selected, the authentication type SMTP will be used for sending mail.

- **Username:** The username that will be used for sending mail via the configured SMTP server.

- **Password:** The password that will be used for sending mail via the configured SMTP server.

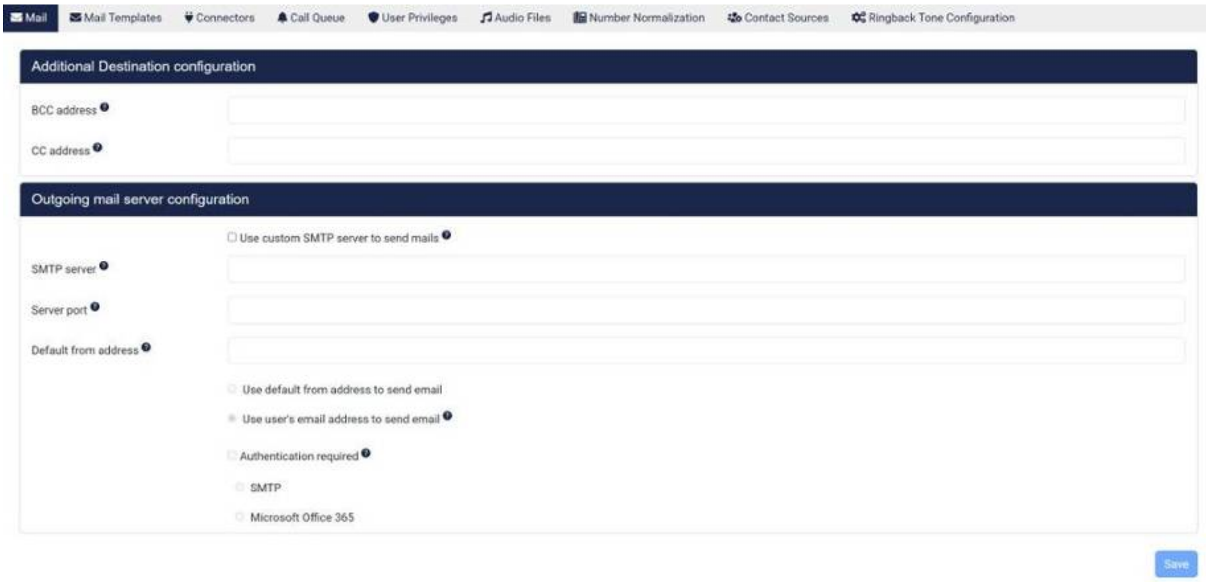
- **Send test mail to:** Enter a valid email address to verify the configuration.

You can test your settings by clicking on the button “Test” and save your changes using the button “Save”.

After setting the custom SMTP, the users need to login into the Receptionist again in order to see the new settings.

In case you also configured additional destination(s) these will also be used when sending e-mails using the custom SMTP settings.

12.2.2 Microsoft Office 365 Authentication



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 Mail server requires authentication, you can check this checkbox to enable the fields where you can enter the credentials.

- **Microsoft Office 365:** When selected, the authentication type Microsoft Office 365 will be used for sending mail.

- **Client Id:** The client Id that will be used for sending mail via the configured Mail server.

- **Client Secret:** The client secret that will be used for sending mail via the configured Mail server.

- **Tenant Id:** The tenant Id that will be used for sending mail via the configured Mail server.

- **Send test mail to:** Enter a valid email address to verify the configuration.

You can test your settings by clicking on the button “Test” and save your changes using the button “Save”.

After setting the custom Mail server, the users need to login into the Receptionist again in order to see the new settings.

In case you also configured additional destination(s) these will also be used when sending e-mails using the custom Mail settings.

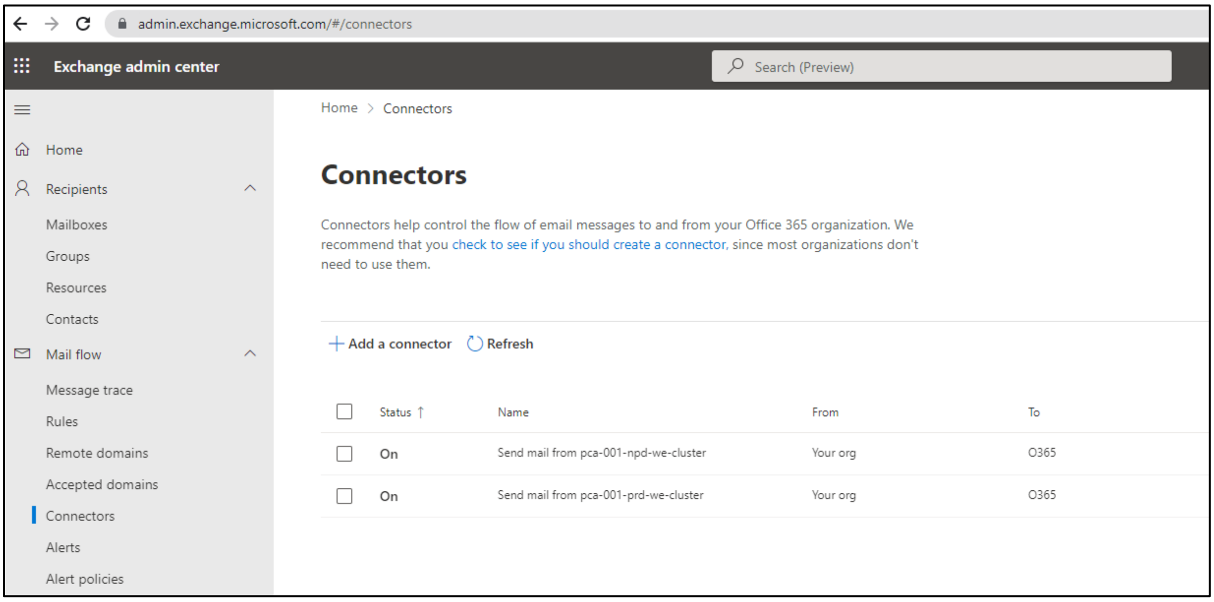
Important:

When using the Microsoft Office365 Authentication, following Permission are required for the related Enterprise application:

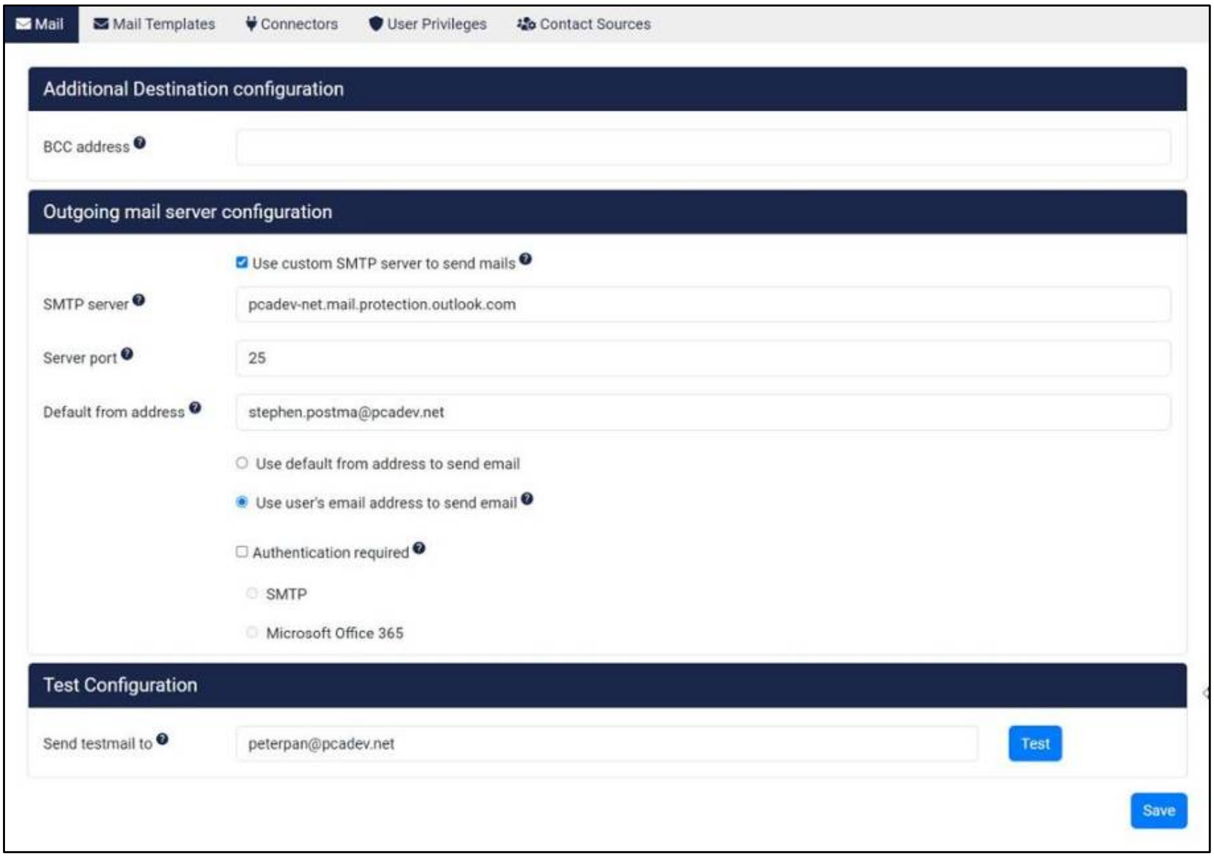
- Sign in and read user profile;
- Read all users’ full profiles;
- Send mail as any user.

12.2.3 Without Authentication

To be able to send mail without authentication, it first needs to create a connector in the tenant you want to use.



Then set the settings in admin portal:



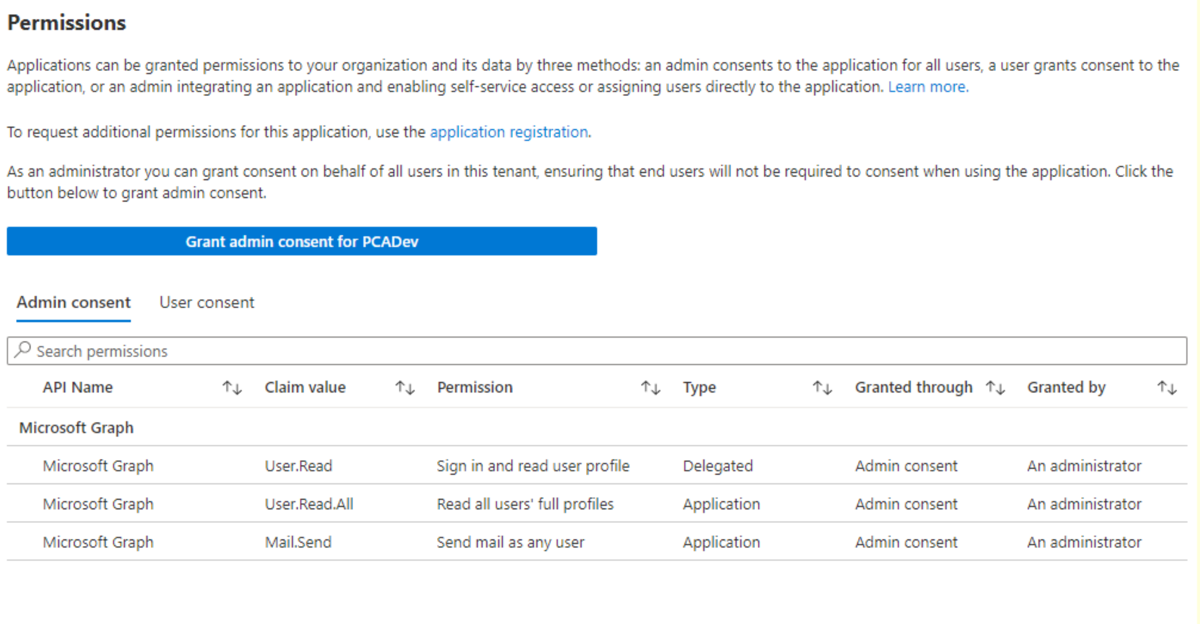
The following settings can be made:

- **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, use the specific DNS for the tenant.

- **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.



12.3 User privileges via Admin portal

On tab page ‘User Privileges’ you can configure for all users the access to

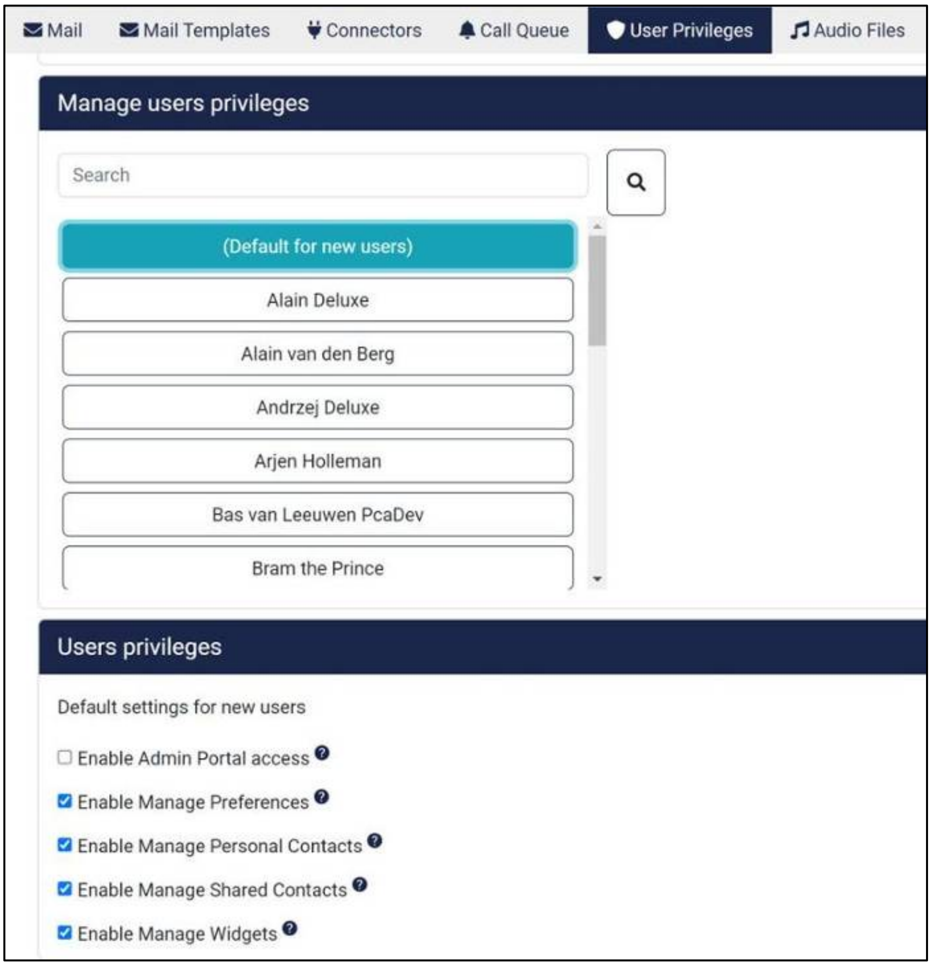
- Admin Portal
- Add/edit/delete Personal contacts
- Add/edit/delete Shared contacts.
- Manage the Preferences
- Add/edit/remove Widgets

You can also configure the default settings for new users.

Note: the User Privileges tab is only available when logging in into the Receptionist Admin Portal with a Microsoft account.

12.3.1 Setting user privileges for default user

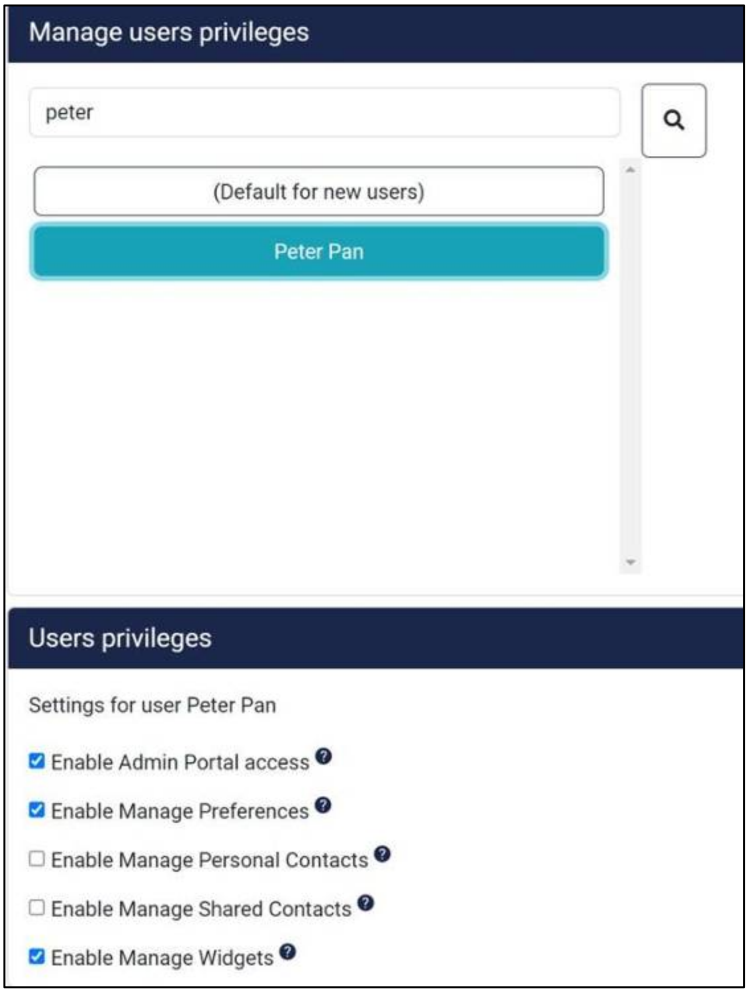
With the '(Default for new users)', it is possible set the default for new users. For example: When the 'Enable Admin Portal access' and Enable manage widgets is unchecked, all new users do not get Admin Portal and manage widget access, they only get manage preferences, manage personal contacts and manage shared contacts.



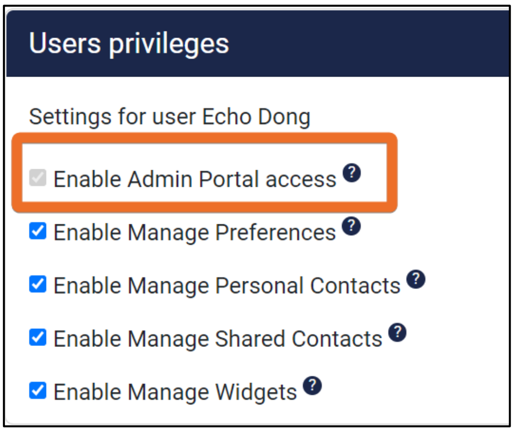
12.3.2 Setting user privileges for specific users

On tab page 'User Privileges' you can also configure the privileges for individual users.

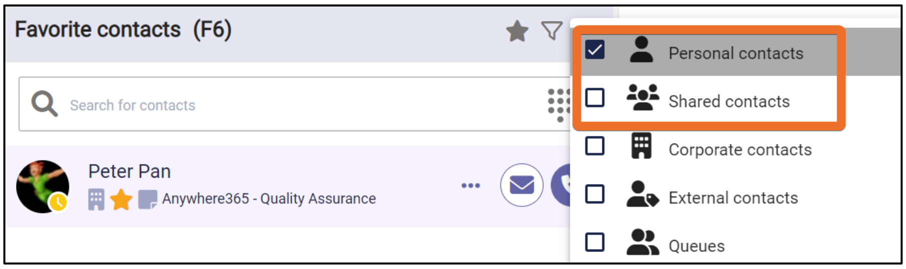
When searching for a specific user, the privileges for this individual user can be set specifically for this user.



Remark: A user cannot remove the Admin Portal access for his/her own account. This is shown with a greyed-out checkbox.



Remark: When manage Personal and/or Shared contacts is disabled for a user, the selected user cannot manage (create, edit or delete) Personal and/or Shared contacts. The user can, however, still view Personal and/or Shared contacts and use them as a filter.



12.3.3 Manage Profile Feature: User Manual

The Manage Profile feature is a powerful new addition to our platform that allows administrators to create, edit, and assign standardized settings profiles to multiple users. This feature enhances efficiency and consistency across the platform by enabling shared settings configurations while still allowing for user personalization.

2. Key Functionalities

2.1 For Administrators

- Create new profiles
- Edit existing profiles
- Delete profiles
- Assign profiles to users
- Unassign profiles from users

2.2 For Users

- Load assigned profile settings
- Utilize standardized settings across multiple users
- Maintain personal settings alongside profile settings

3. Accessing Manage Profile

Administrators can access the Manage Profile feature by clicking on "Manage Profiles" in the main menu of the Receptionist platform.

4. Creating a Profile

To create a new profile:

1. Navigate to the Manage Profiles menu
2. Click on "Create New Profile"
3. Enter a name for the profile

4. The current settings of your Receptionist instance will be saved as the default for this profile
5. Click "Save" to create the profile

5. Editing a Profile

To edit an existing profile:

1. Select the profile you wish to edit from the Manage Profiles menu
2. Click "Load Profile Settings" to apply the profile settings to your current instance
3. Make the desired changes to the settings
4. Click "Save Settings" to update the profile

6. Deleting a Profile

To delete a profile:

1. Select the profile you wish to delete from the Manage Profiles menu
2. Click "Delete" option
3. Confirm the deletion when prompted

7. Assigning Profiles to Users

To assign a profile to users:

1. Access the Admin Portal
2. Navigate to the User Preferences tab
3. Select the user(s) you wish to assign a profile to
4. Choose the desired profile from the dropdown menu
5. Click "Save" to apply the changes

8. Unassigning Profiles

To unassign a profile from a user:

1. Follow steps 1-3 from Section 7
2. Select "No Profile" from the dropdown menu
3. Click "Save" to apply the changes

9. Profile Merging

When a profile is applied to a user's account, the system performs a merge between the profile settings and the user's current settings. This merge functionality allows for greater flexibility and personalization.

How Merging Works:

- Existing user settings are retained when they don't conflict with profile settings.
- Profile settings are added to the user's current configuration.
- In cases where both the user and the profile have settings for the same feature (e.g., widgets), both sets are combined.

Example:
If a user currently has a Calendar widget, and the applied profile includes a Website widget, the user will see both widgets after the profile is applied.This merging feature ensures that users can maintain their personal preferences while benefiting from standardized settings provided by administrators.

10. Current Profile Settings

As of now, profiles include the following settings:

- Joined queues
- Monitor queues
- Widgets

Please note that additional settings may be added in future updates based on customer needs and feedback.

11. User Experience

When a user logs into the Receptionist platform, they will see their personalized settings, which are a combination of:

- Their individually saved settings
- The settings from their assigned profile (if any)

These settings will persist across login sessions, ensuring a consistent user experience.

12. Troubleshooting

If you encounter any issues while using the Manage Profile feature, please try the following:

- Ensure you have the necessary permissions to create or edit profiles
- Log out and log back in to refresh your session
- Clear your browser cache and cookies

If problems persist, please contact our support team for assistance.

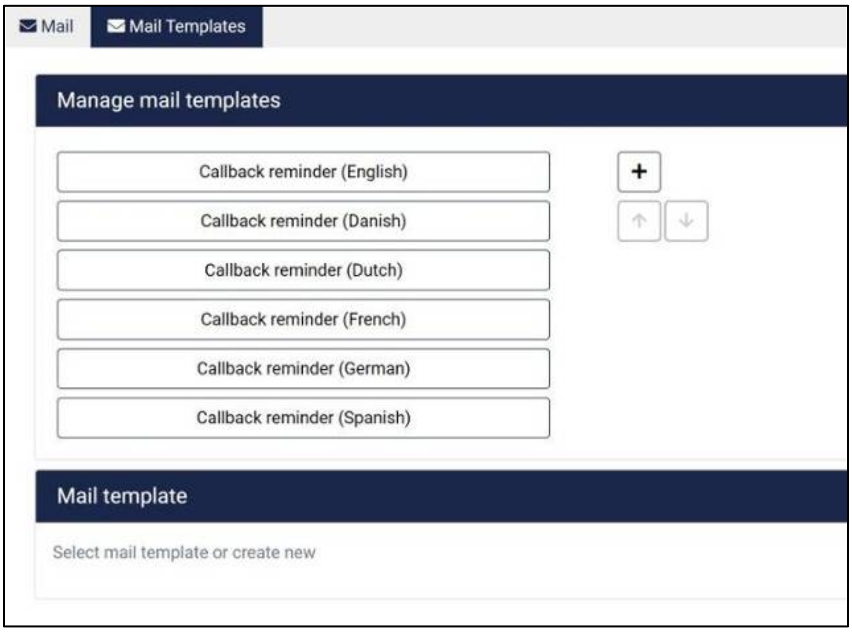
13. FAQs

Q: Can a user have multiple profiles?
A: No, a user can only have one profile assigned at a time.Q: What happens to a user's settings if their assigned profile is deleted?
A: The user will retain their current settings but will no longer receive updates from the deleted profile.Q: Can regular users create or edit profiles?
A: No, only administrators have the ability to create, edit, or delete profiles.For any additional questions or concerns, please contact our customer support team.

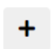
12.3.4

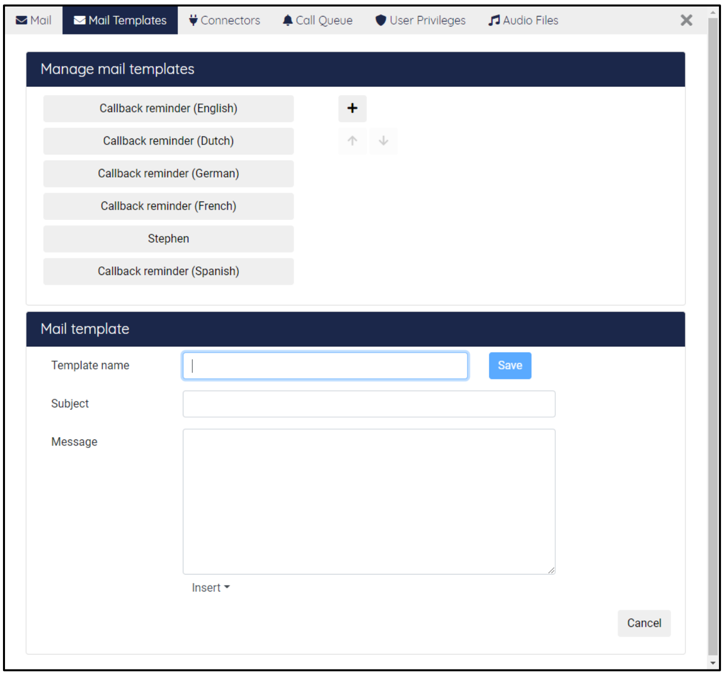
12.4 Maintain callback mail template

On tab page ‘Mail Templates’ you can configure mail templates used for call back e-mails. On the top half of the page, you see a list of mail templates. On the bottom half, you see the text to select a mail template or to create a new one.



12.4.1 Adding a new mail template

In the top half of the page click on the  sign to open the bottom part for entering a new mail template.



A mail template requires:

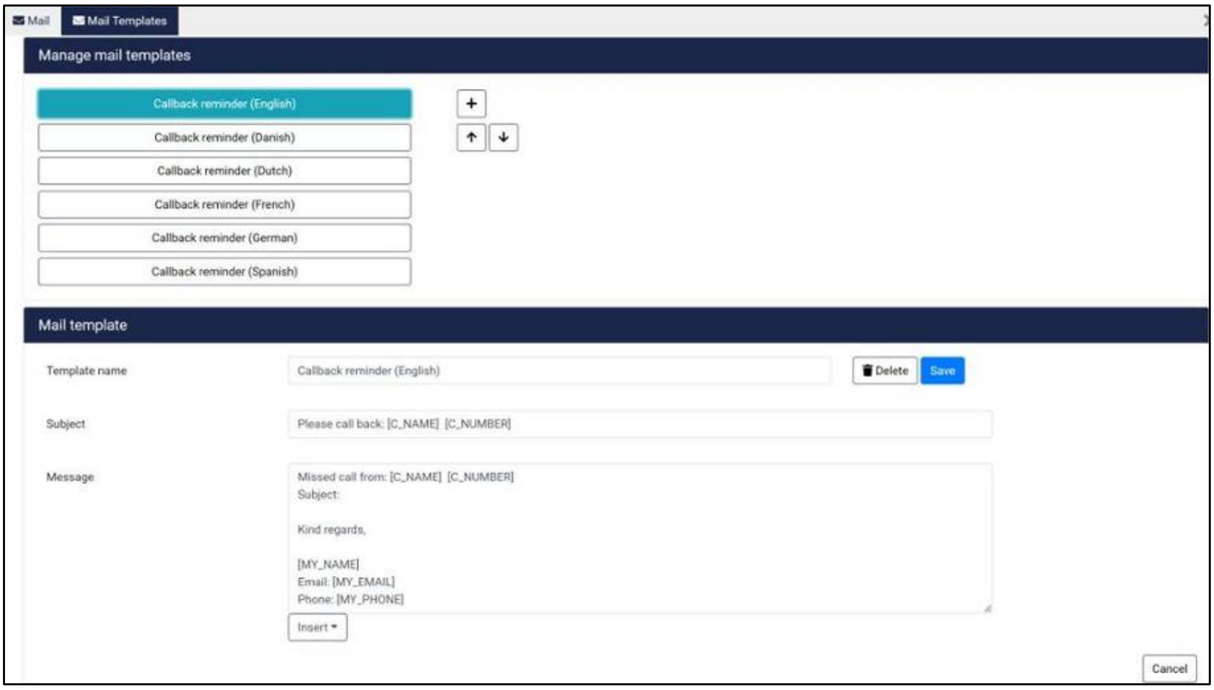
1. Template name, name of the template as it is shown to the user;
2. Subject, this line becomes the subject of the e-mail that is being sent;
3. Message: this contains the actual e-mail content. By using the insert drop down at the bottom the following fields can be inserted:
   - Name of caller;
   - Phone number of caller;
   - Date;
   - My mail address (e-mail address of the logged in user);
   - My name (name of logged in user);
   - My phonenumber.

Once the mail template is finished it can be stored by clicking the ‘Save’ button.

In case the mail template can be discarded, this can be done by clicking the ‘Cancel’ button.

12.4.2 Arranging the order of mail templates

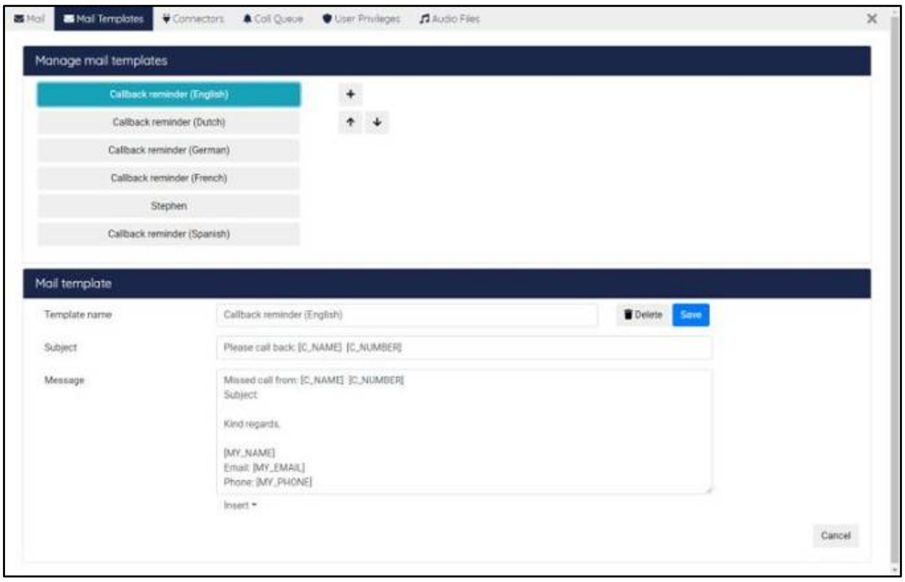
By selecting a mail template and clicking on the arrow up or arrow down button you can arrange the order of the mail templates. The mail templates are shown in this order when the user selects a mail template for sending a callback reminder e-mail.



12.4.3 Changing or deleting a mail template or creating a new one

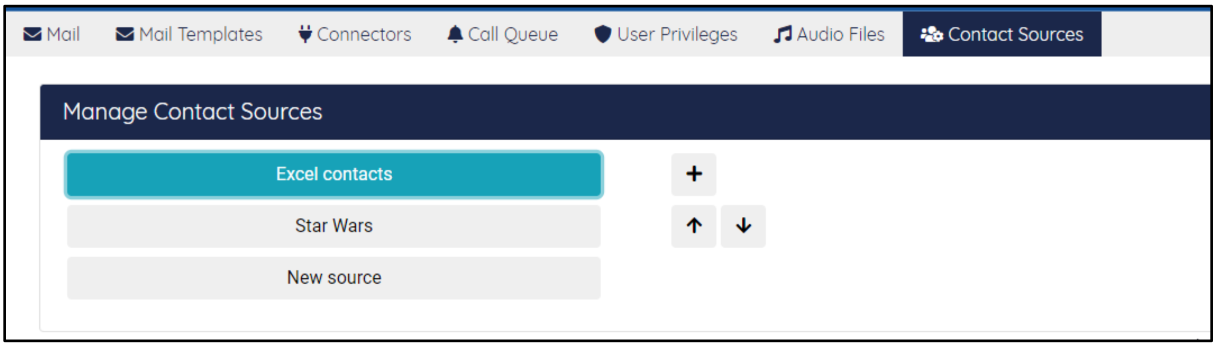
By selecting a mail template, the content of that mail template is shown in the bottom half of the screen. The user can change the content like with creating a new mail template and then press the 'Save' button.

By clicking the 'Delete' buttom a mail template that is obsolete can be deleted. The delete action has to be confirmed.



12.5 Contact sources

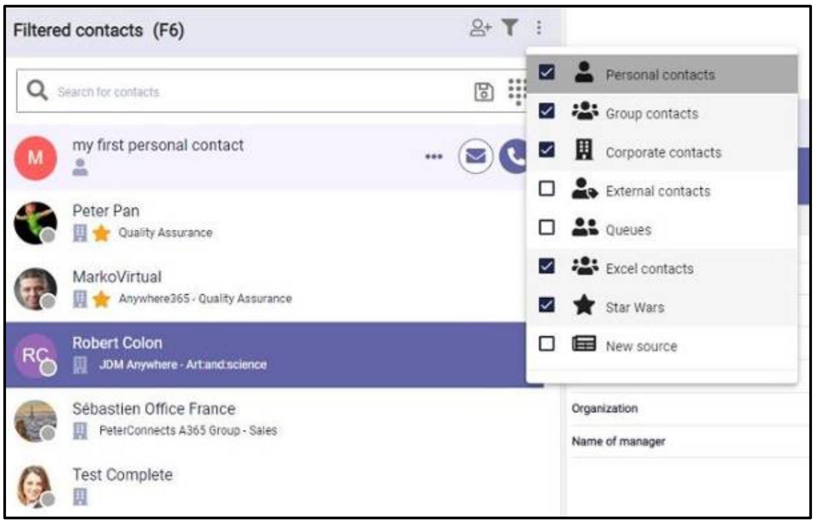
In the Admin Portal, under the tab 'Contact Sources' additional contact sources can be managed. Contacts from these sources will become part of the contact list (F6).



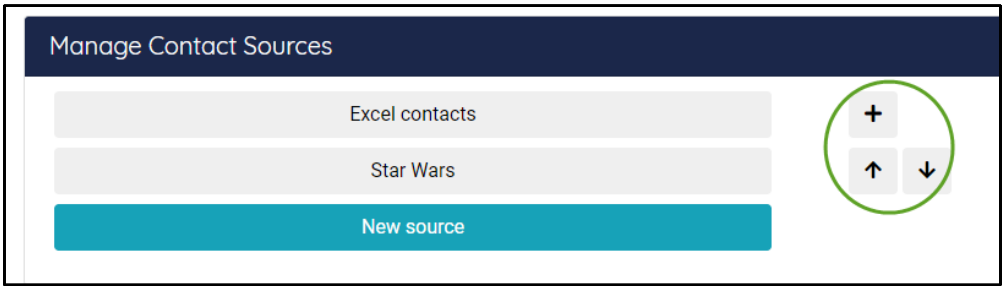
A new contact source can be added via a link to the source document, this can be Excel or CSV source documents.

Each contact source appears in the filter menu and can be toggled on/off just like other contact types.

After adding a contact source, an application refresh is necessary to make the contact source show up in the filter menu. The contact list (F6) will automatically be updated when the contacts in the source document are changed, however it might take some time for the new changes to end up there.



The order in which the contact sources are presented in the filter menu can be changed by clicking on an item in the list in the Admin Portal and using the arrow up and down buttons to the right to move it up or down the list, respectively.

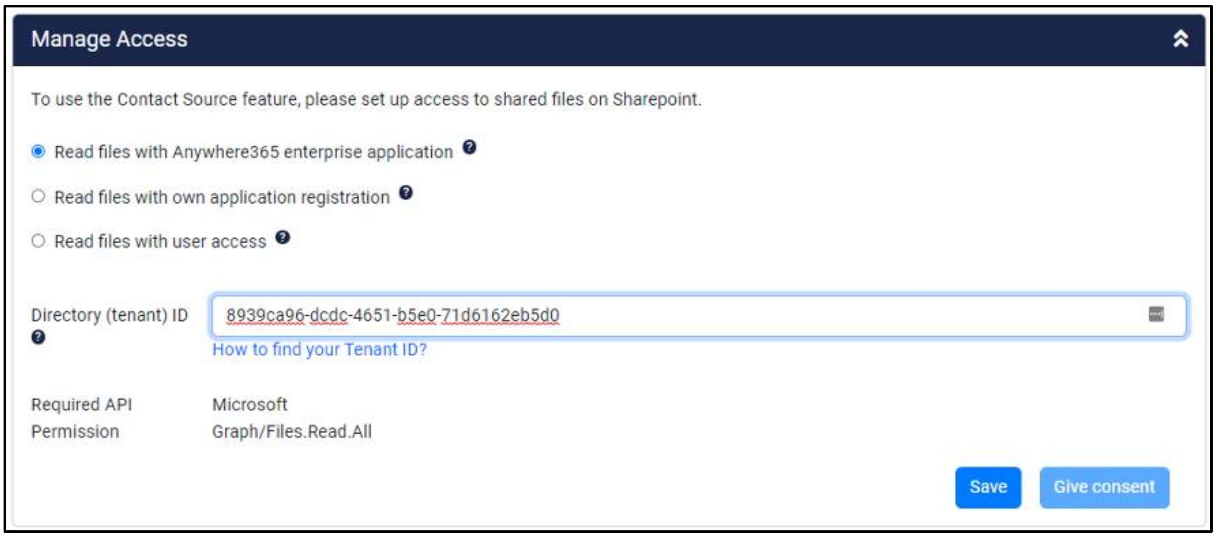


12.5.1 Managing access

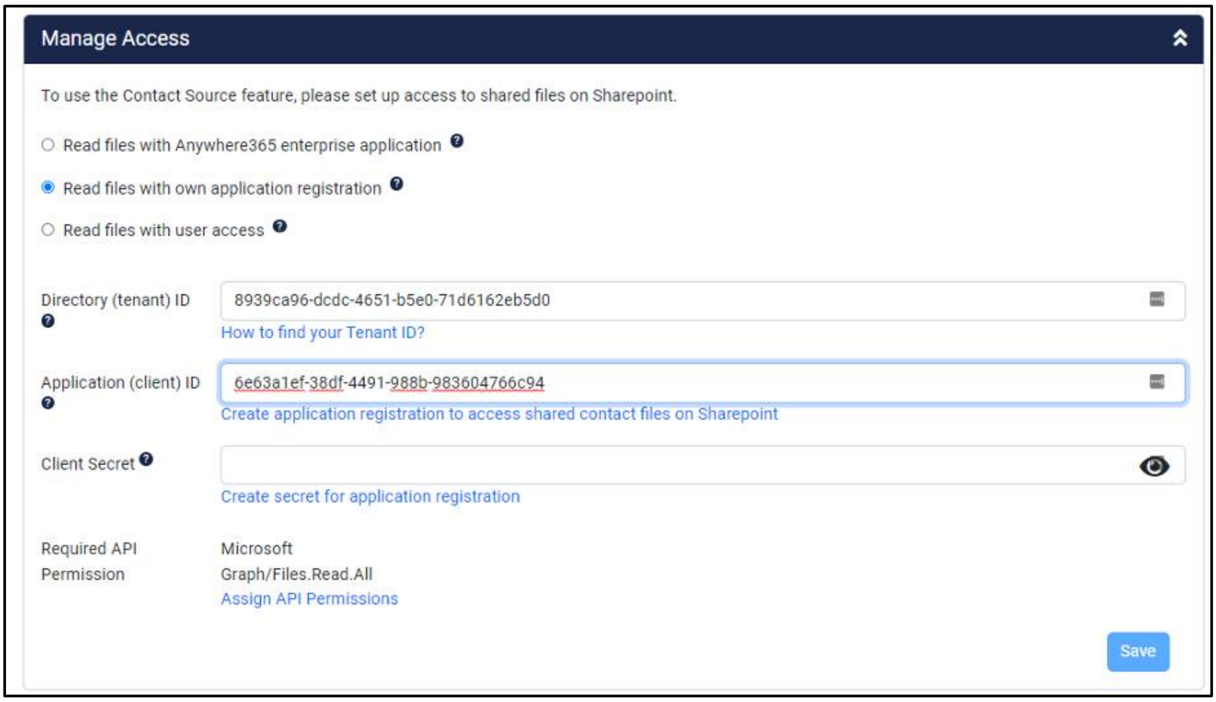
In order to work with contact sources, we need to set up a way for the attendant console to be able to read files from Sharepoint. At the top, there is a panel to manage access.

There are 3 possible ways to set up access:

1. Use the Anywhere365 enterprise application. For this, you only need to specify your own Azure tenant ID, save it and give consent. The Anywhere365 then has access to read the files your tenant's Sharepoint.



2. Create an application registration in your own tenant and configure the access to it here. You will need to set up the permissions yourself. The Client Secret is stored securely and after saving will not be shown in the admin portal. The links below each setting will help gather the required information and to set up the application in Azure.



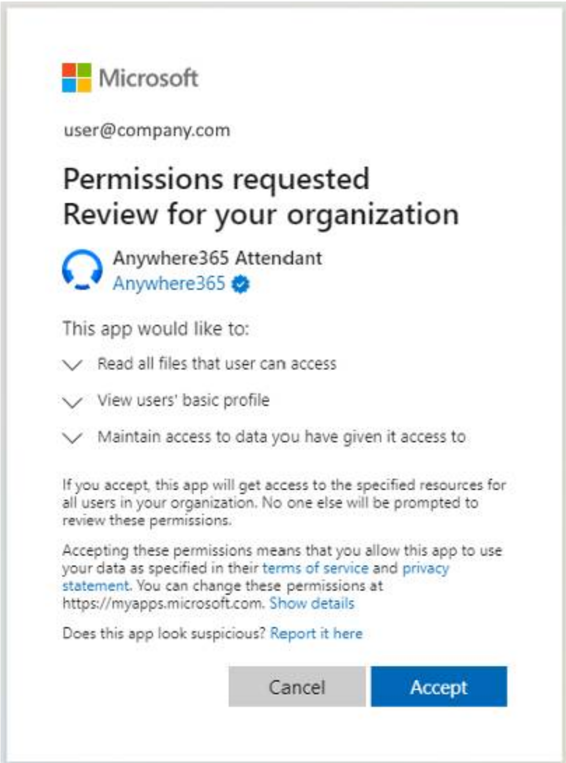
3. Use delegated access from your user. This option is only available if you are logged in with an Azure User in the Attendant Console. This also requires admin consent. Since different users can be used to access the files, extra caution must be taken when setting up the access to the files in Sharepoint. If some users do not have access to the file, it might lead into issues when loading the contacts.

The Manage Access panel will be collapsed when there are contact sources configured, but the settings can always be revisited by clicking on the header.

12.5.1.1 Admin consent

As said before, the application requires admin consent for reading files users have access to. If this consent is not given, a message will pop up including a button to give consent. If no admin consent has been given, validating a contact source will result in a permission denied error.

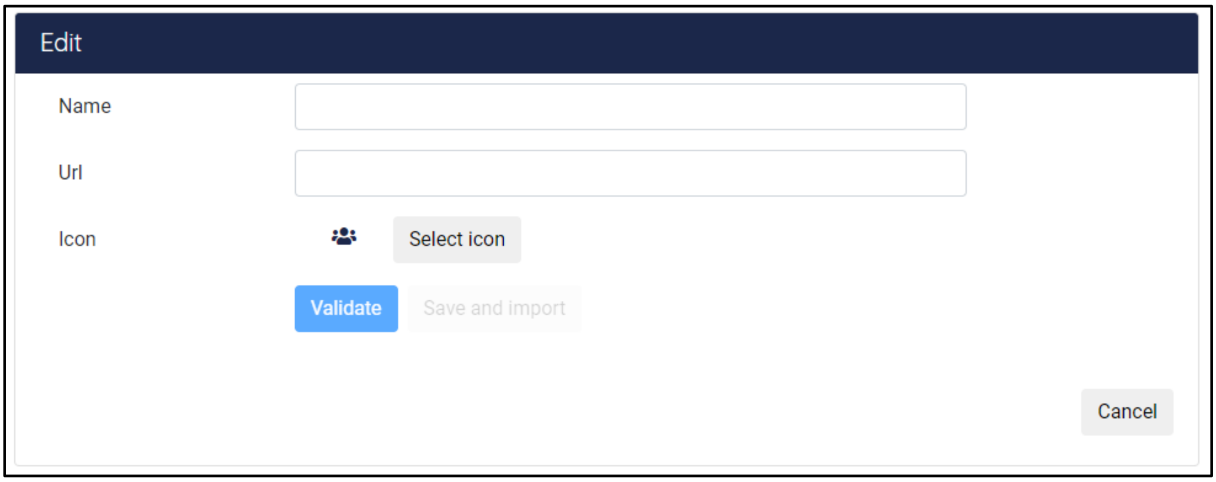
Clicking on the ‘Give consent’ button will redirect you to a Microsoft page where you can accept the permissions requested:



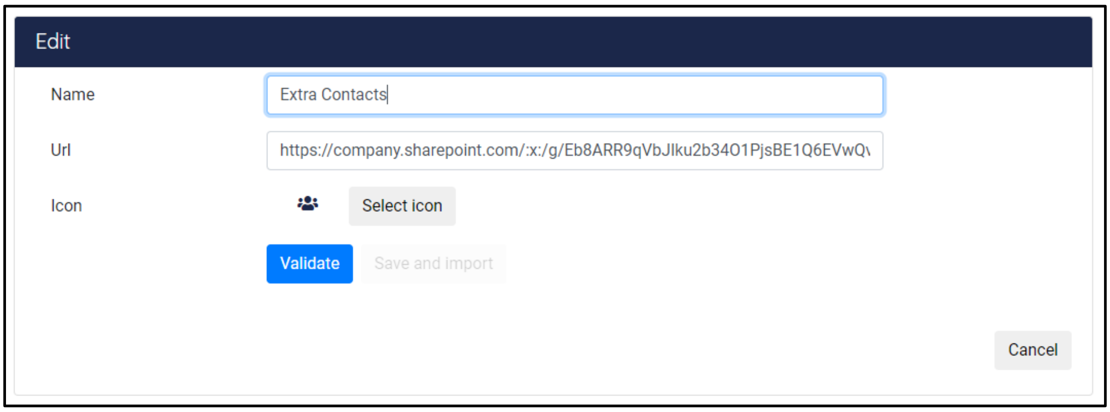
After giving consent, it might take a few minutes before it has been processed. Please refresh the page until the message disappears. Once the consent message is no longer presented, the contact sources are available to be configured.

12.5.2 Adding or changing a contact source

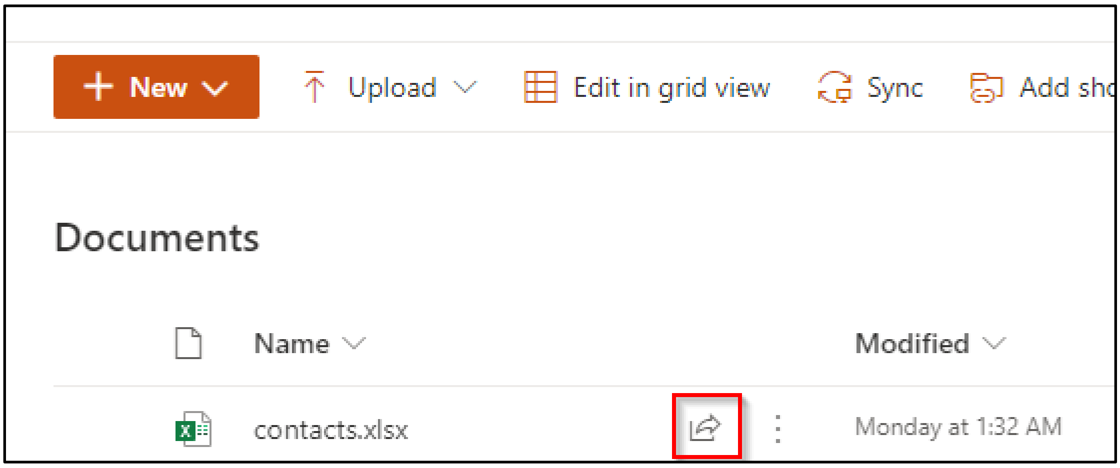
By clicking the plus icon  next to the list of current contact sources you can add a new contact source. After clicking the button, a new section opens below the list of contact sources. You can also select one of the contact sources in the list to edit.



In the form you can give the source a name and icon which is displayed to the users in the contact list filter menu. You can also paste the URL of the file here.
Files can be either Excel files or Csv files stored on the organizations SharePoint or OneDrive.

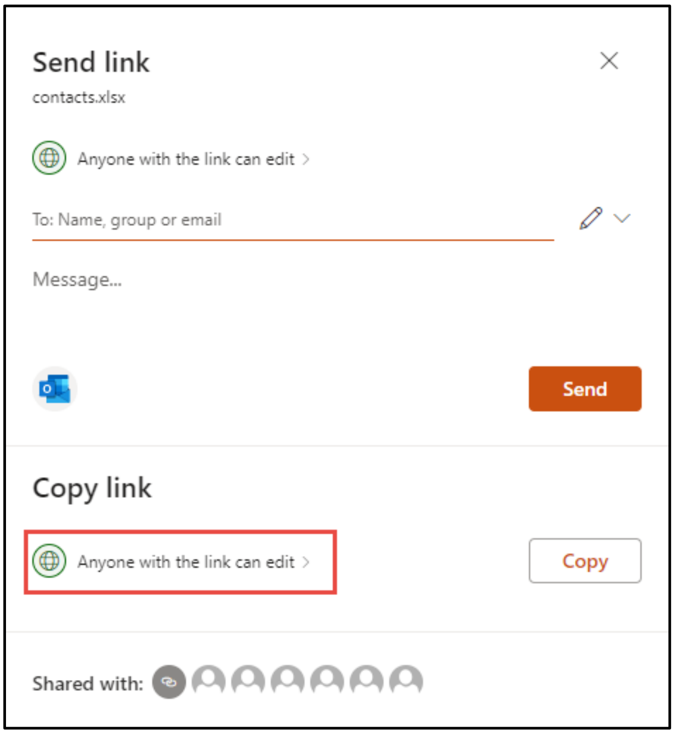


To create a URL which can be pasted in this form, go to your organization's SharePoint or OneDrive in your browser and locate the file. Then click on the Share Link button:



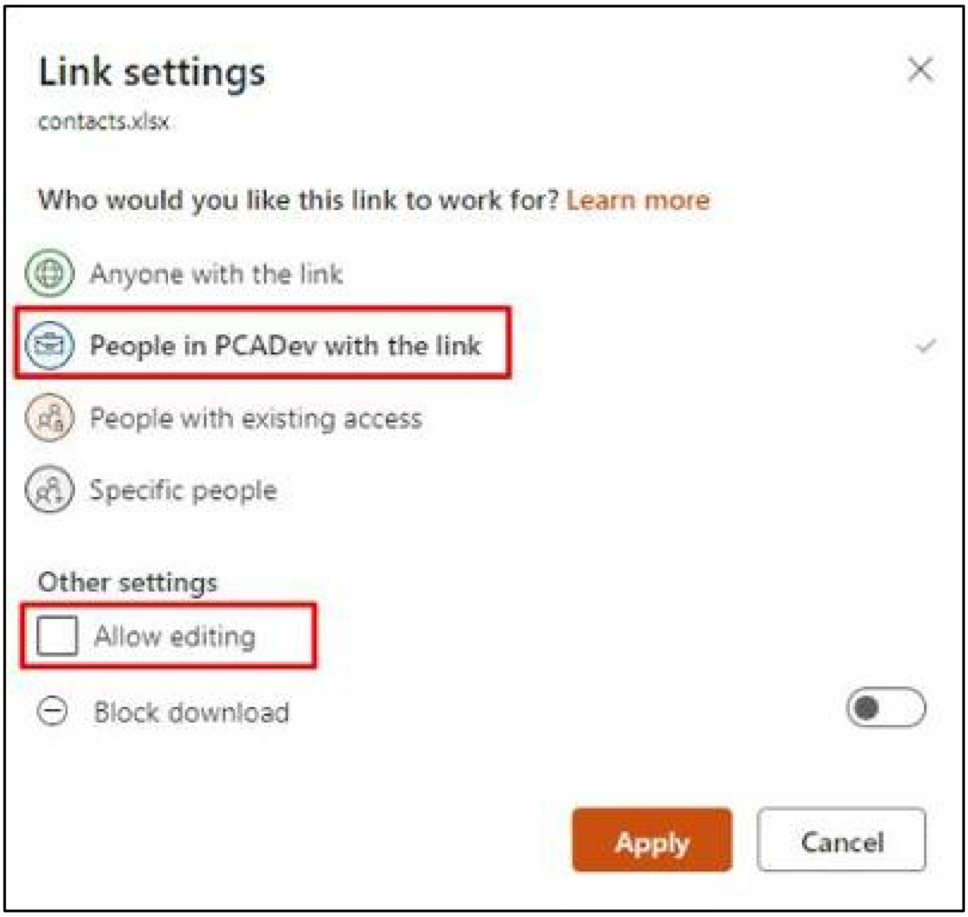
There you can copy the link and change access. By default, the Edit rights seem to be granted for everyone who has the link.

You have to change the settings by clicking on “Anyone with the link can edit”.

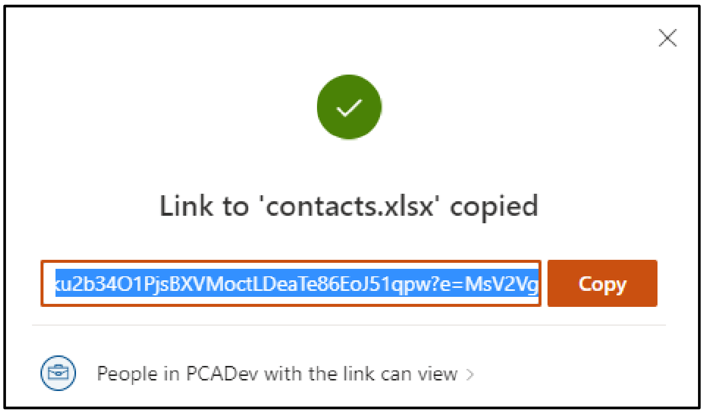


Only view access is required for the contact source functionality: uncheck the ‘Allow editing’ checkbox to make it read-only.

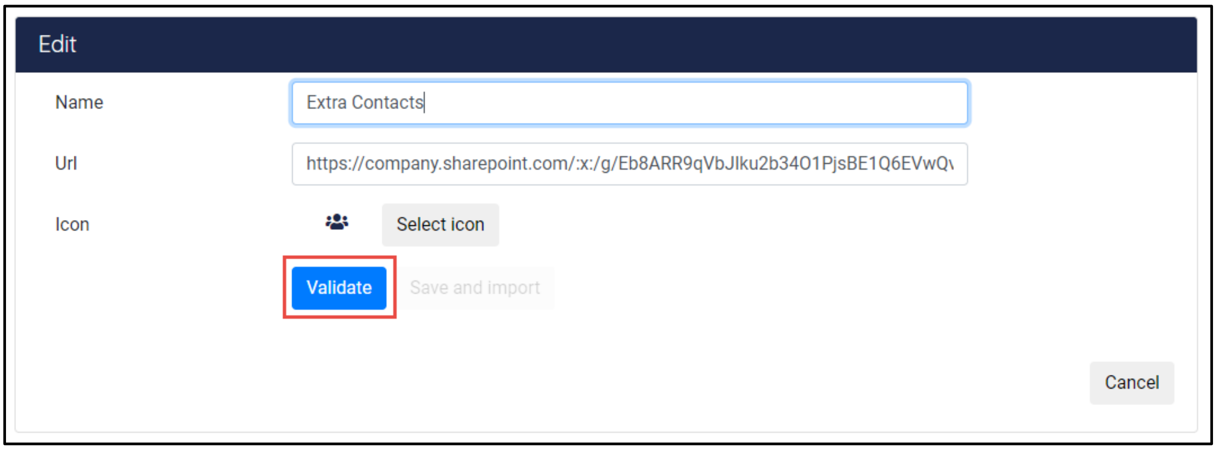
Additionally, make sure to make the link only works for people in the same organization. The option “Anyone with the link” is unsecure, while “People with existing access” or “Specific people” might not allow the system to read the contacts when the document has been changed.



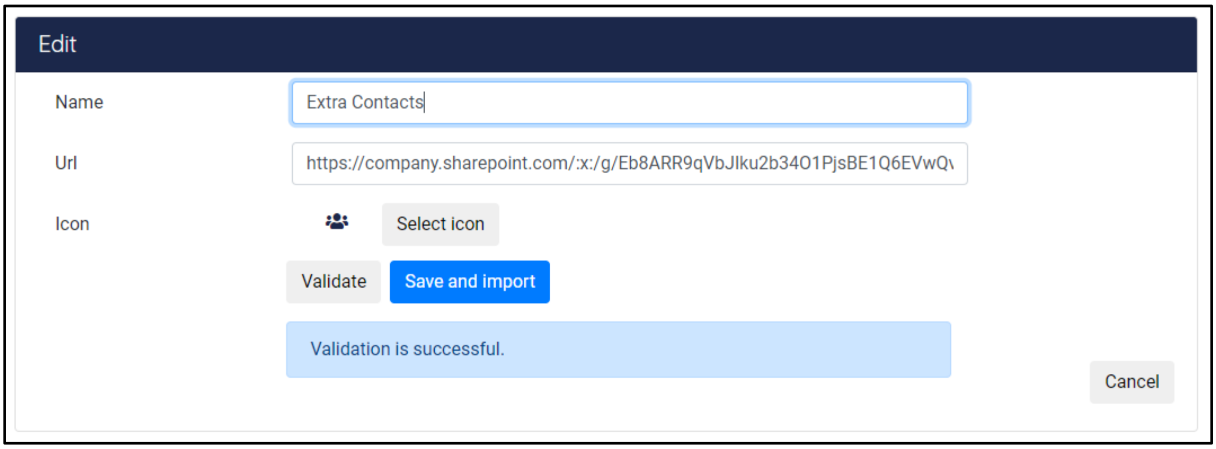
A pop up is presented with a 'Copy' button to copy the URL to the contact source to the clip board. Please verify that it indeed indicates that only people from your tenant with the link can view the document.



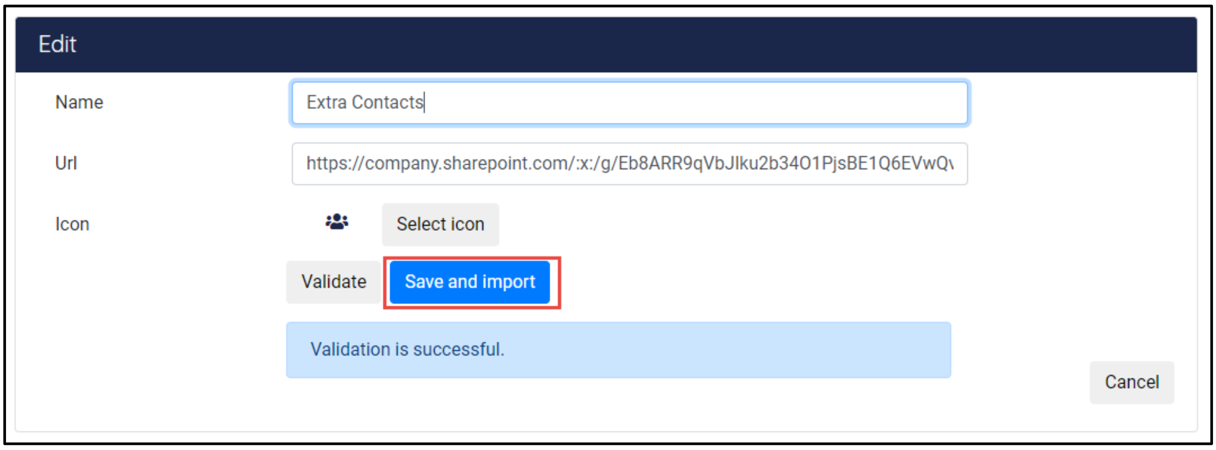
With the URL on your clipboard, please return to the admin portal. After filling in both the Name and the URL and optionally selecting a different icon, you have to validate the contact source by clicking the 'Validate' button.



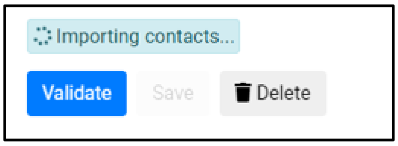
This will validate and test access to the contact source. After validation a message will appear to show the user whether the file is correct or not. In case the file is not valid a detailed message is shown, in case the file is valid it shows 'Validation is successful'.



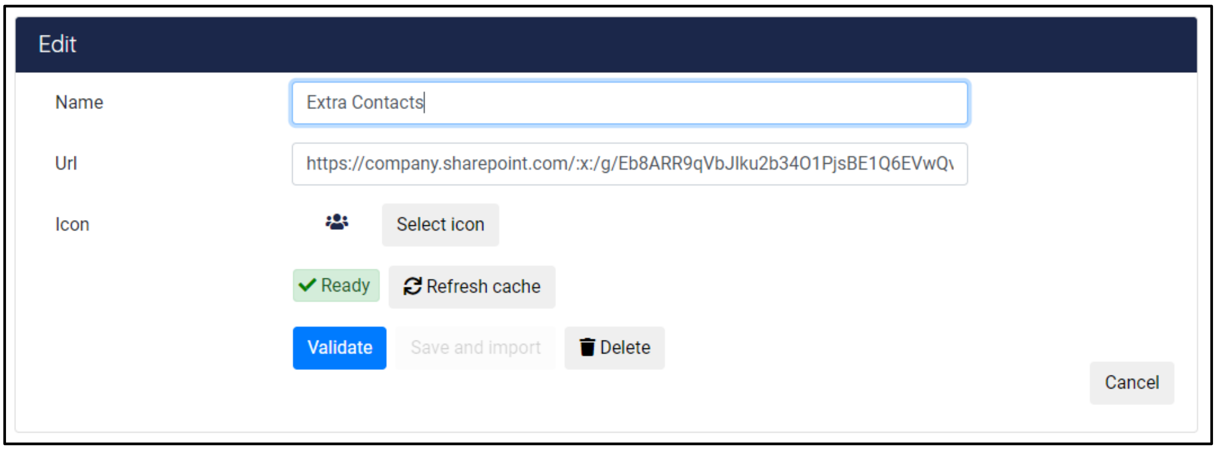
After a successful validation, the 'Save and import' button will be enabled. Click it to actually import and save the new contact source in the contact list (F6).



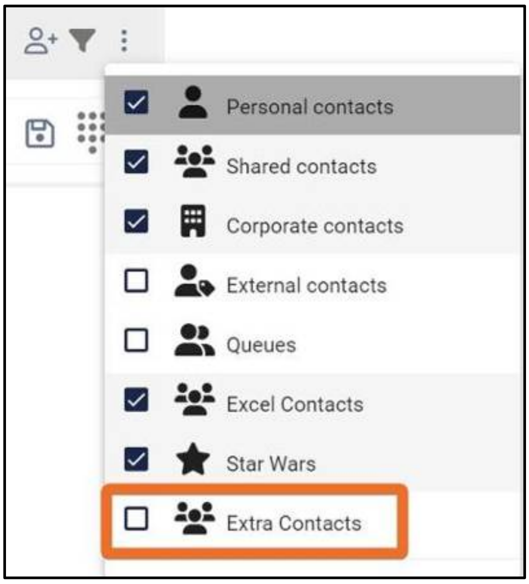
A progress message will appear showing the status of the import.



Once ready it shows a green 'Ready'.



The contacts in the new contact source will only show up in contact list search results when all contacts have been imported and actually saved (available in the cache). After login the Attendant will see the new contact source in the contact list filter menu.

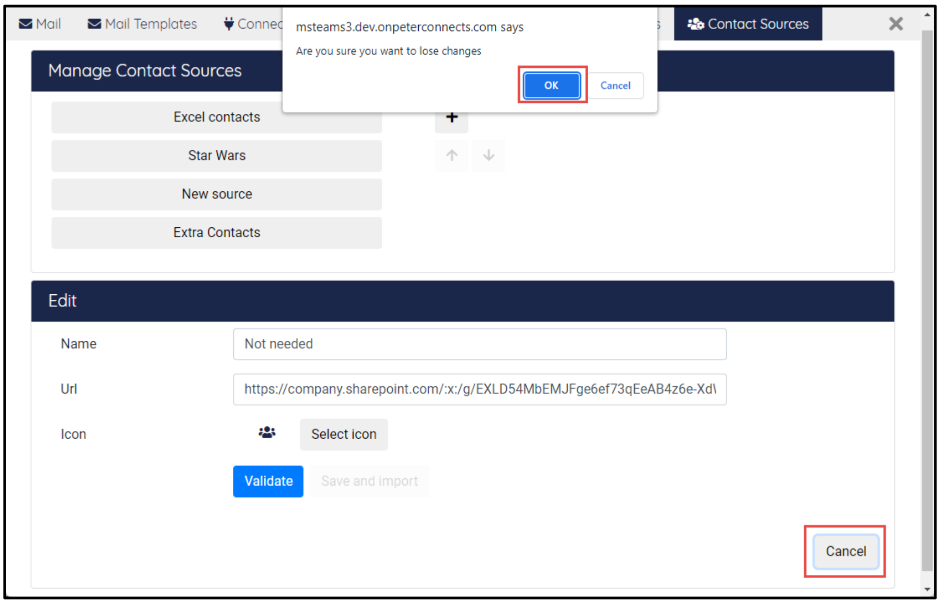


Changes to the underlying contact source files will automatically be picked up when a search is being performed and the file has been found to be modified. Important to know is: it might take some time before the changes are synchronized into the contact list, especially with large contact source files (it triggers a cache rebuild).

When the cache is ready, a 'Refresh cache' button appears. This button will force a complete refresh of the contacts in the source file.

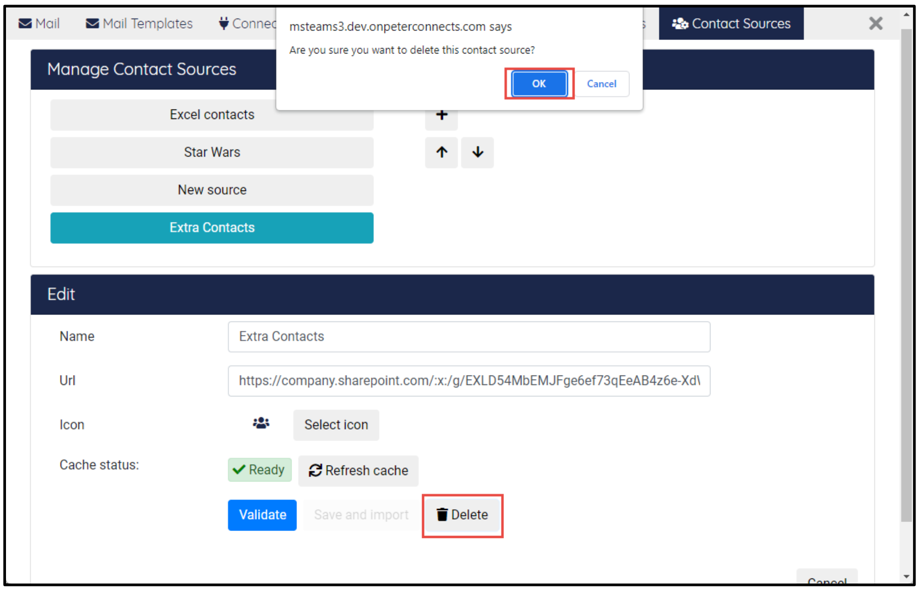
Note: after changing a document in Sharepoint or OneDrive, it may take a couple of minutes before the changes are picked up by the Admin Portal.

In case you do not want to create the contact source after all, you can click 'Cancel' and the bottom part is closed and nothing is saved.



12.5.3 Deleting a contact source

To delete a contact source, click on it in the list of contact sources. The form with the details will appear. Click the 'Delete' button confirm that you are sure you want to delete this contact source.



In the background, the contacts will be removed. The contact source will also disappear from the filter menu in the contact list (F6).

12.5.4 Supported file formats and columns

Currently the following files are supported: Excel files (.xlsx, .xls), comma or semicolon separated files (.csv) and tab separated files (.tsv).

For Excel files the first sheet must contain the data, all other sheets are ignored.

On the first row the column names are specified. Every column corresponds to a property of a contact. See below for a list of all properties supported. Required properties are the LastName and Id.

The next rows should contain the information of the contacts.

For template and example files, please see the following zip file:
https://delivery.anywhere365.io/deployment/Attendant-Receptionist-Contact-Sources.zip

Below is a list of supported columns:

Column	Description
Id	(Required) A unique ID for this contact in this file.
FirstName	
LastName	(Required)
DisplayName	
CompPrimaryPhone	Primary phone number
CompAltPhone	Alternative phone number
MobilePhone	
Pager	*)

Titles	*)
CompanyEmail	
Building	**)
BuildingAddress	*)
BuildingPostalCode	*)
BuildingCity	*)
BuildingCountry	*)
Location	*)
Department	*)

*) field not displayed when using login via Webex.

**) field not displayed when using Broadworks login.

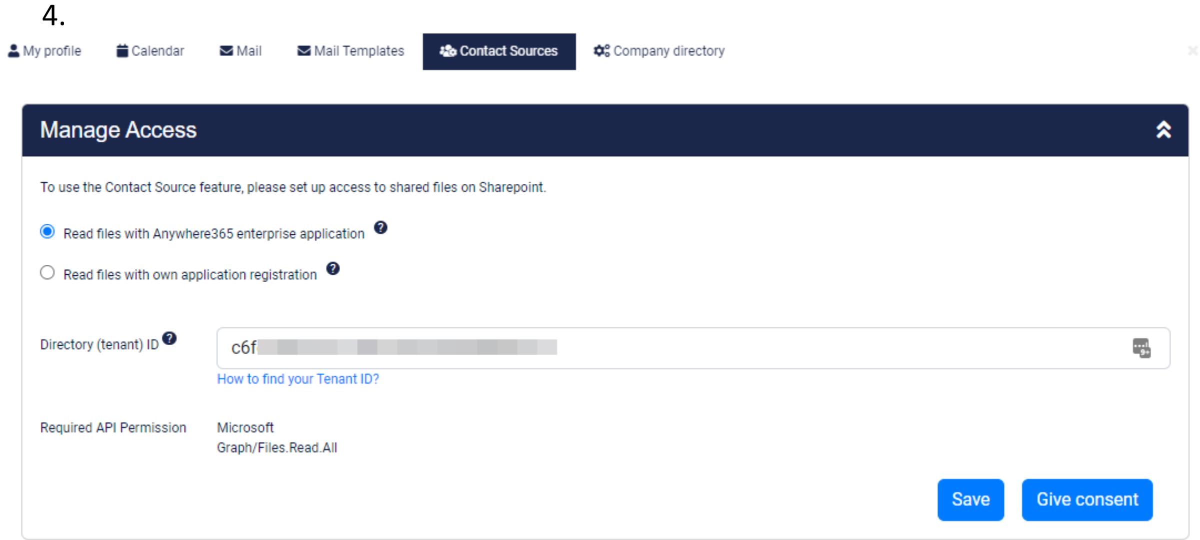
1.1.1. External Contact Sources

It is possible to configure additional contact sources such as Excel files with contacts in the Admin Portal. In the admin portal the files can be uploaded.

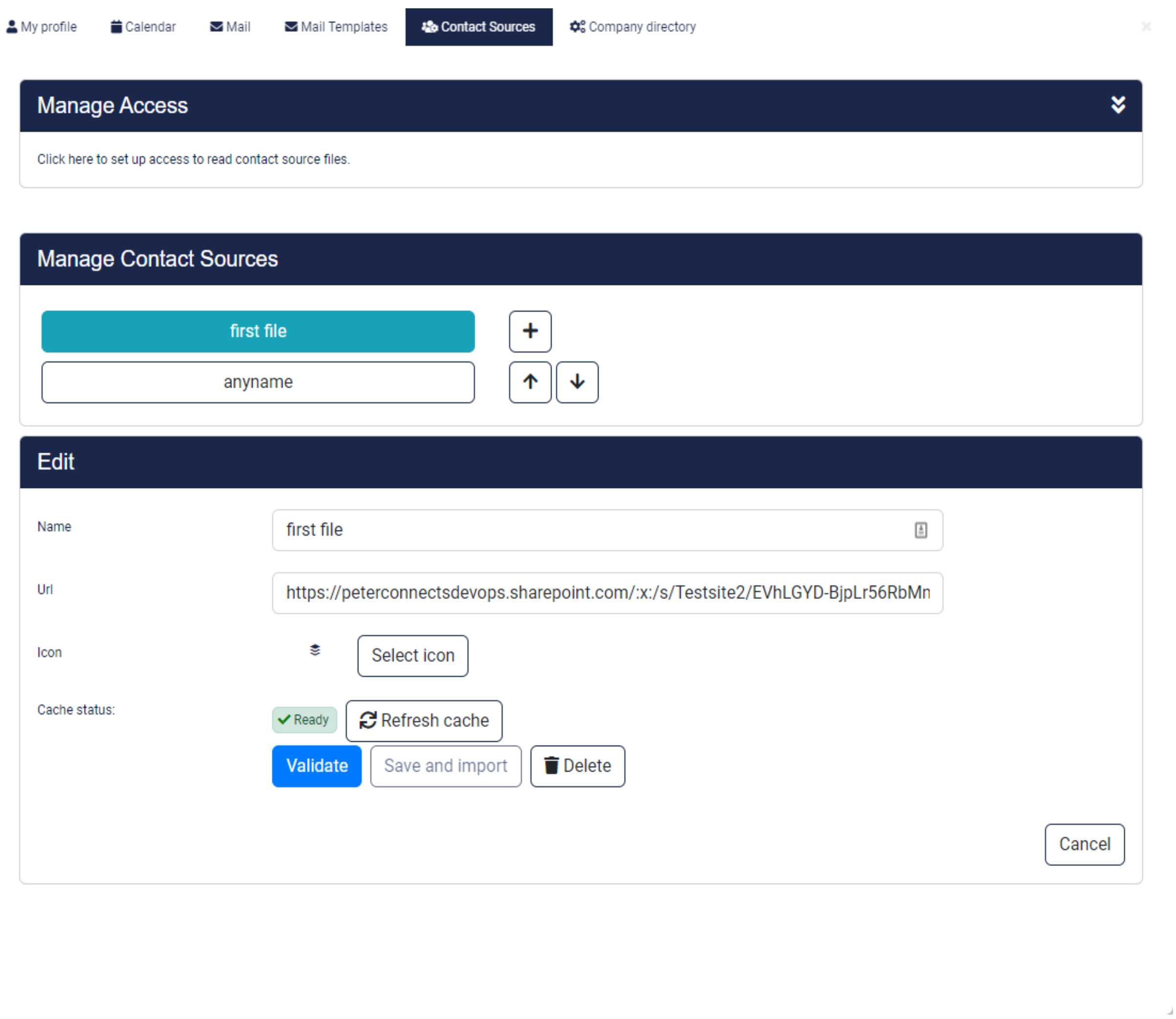
Admin Consent for Files.Read.All is required to be able to configure the sources.

To manage the access to the SharePoint location for external contact sources, there are 2 or 3 options:

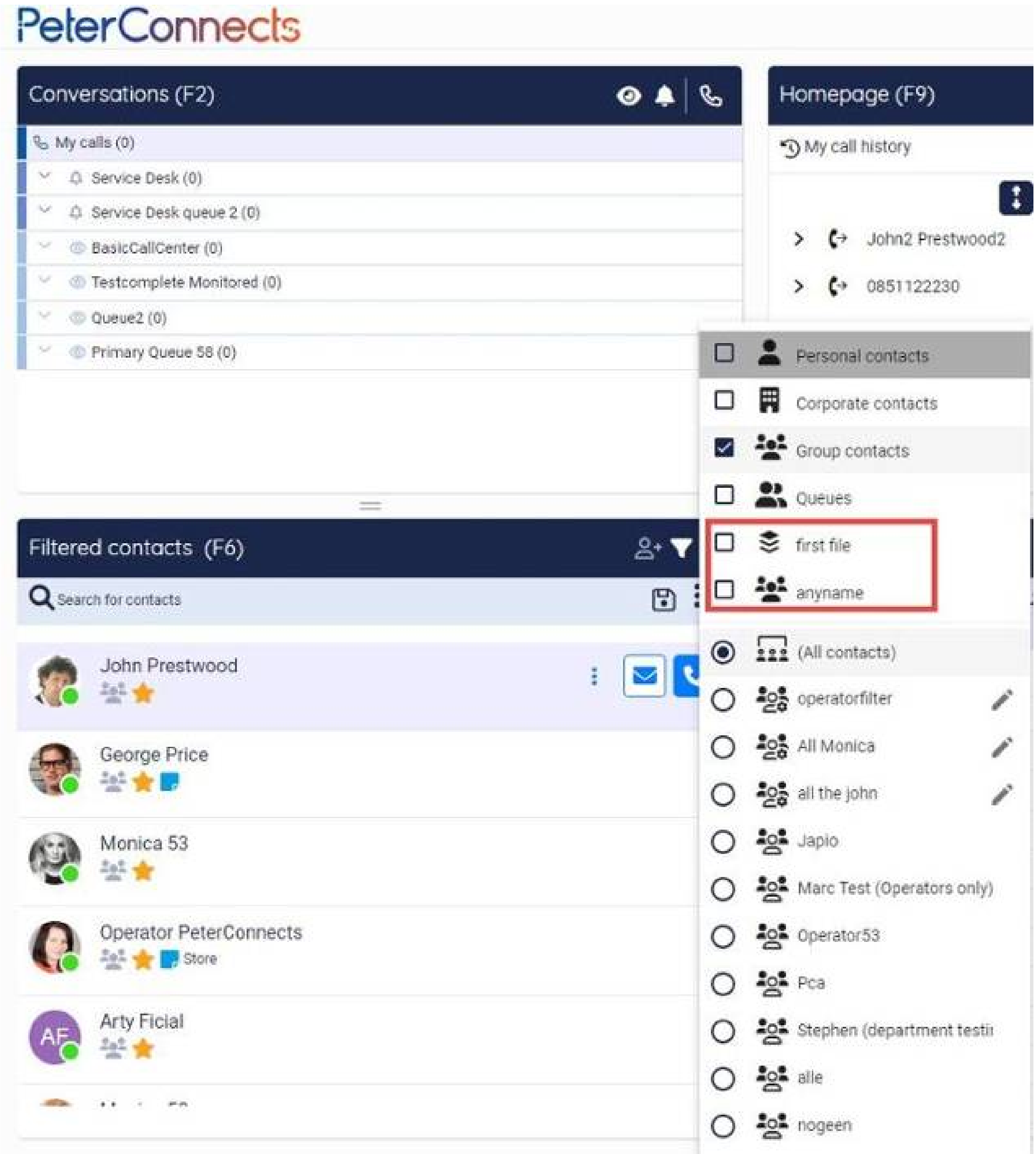
1. Read files with Anywhere365 enterprise application
2. Read files with own application registration
3. Read files with user access (only Microsoft login)
4.



After giving consent by an admin user, new contact sources can be uploaded in the Admin Portal. Existing contact sources can be maintained or deleted here as well.


My profile
Calendar
Mail
Mail Templates
Contact Sources
Company directory
Manage Access
Click here to set up access to read contact source files.
Manage Contact Sources
first file
anyname
Edit
Name
first file
Url
https://peterconnectsdevops.sharepoint.com/:x:/s/Testsite2/EVhLGYD-BjpLr56RbMn
Icon
Select icon
Cache status:
Ready
Refresh cache
Validate
Save and import
Delete
Cancel

The receptionist users see the contacts form external contact sources in the F6 list and as one of the filter options:



For further information regarding this functionality, see User Manual section Global Configuration/Contact Sources.

12.6 Enterprise Group selection

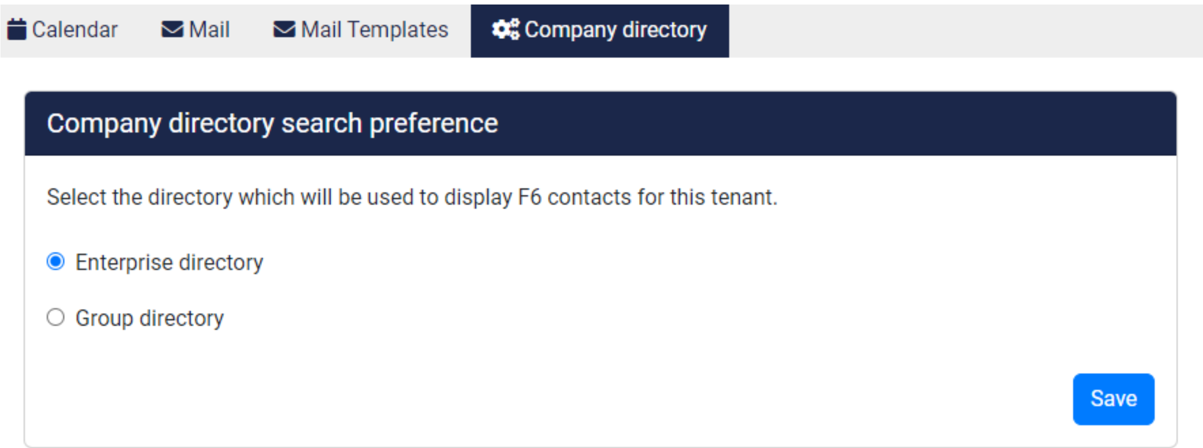
In the tab Company directory, the display of the contacts in the F6 (Contact list) can be set to:

1. Enterprise directory

2. Group directory

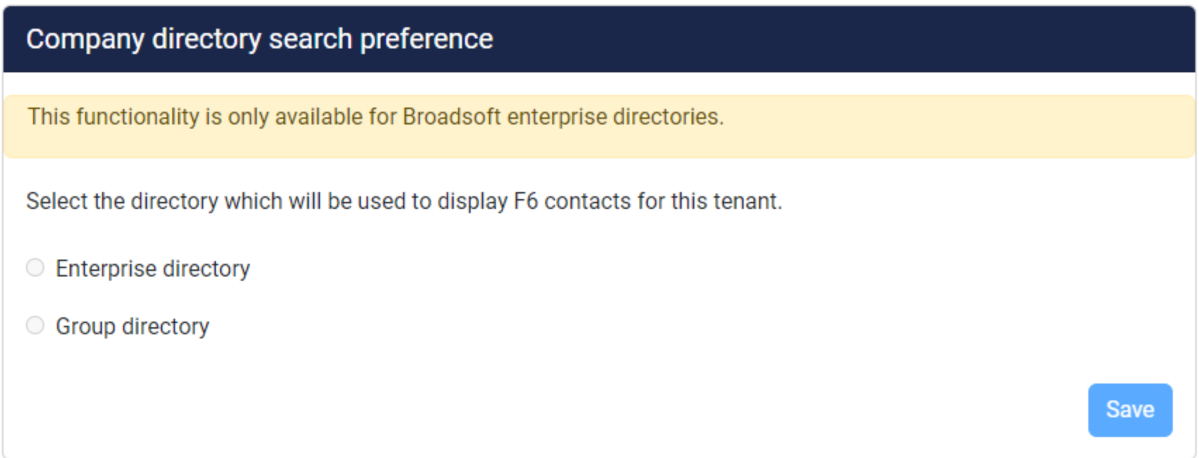
In case Enterprise is selected all contacts of the entire enterprise are shown in F6, in case Group is selected, only the contacts of the group that the user that is logged in belongs to are shown.

When no selection is made yet, by default all contacts of the enterprise are shown in F6



Note: after changing and saving a new setting, it can take up to 24 hours before the setting is reflected in the search results of the F6 contact list.

Some organizations do not support this functionality, in those cases no selection can be made, and the selection functionality is disabled.



13 Change history

1.15	• Update §4.14 with callback numbers of previous calls.
1.14	• Update section §4.11 with option to add/edit/remove contacts in F6 • Added §4.12 about adding shared contacts when using Microsoft login • Added §4.13 describing the use of additional contact sources. • Updated §6.1 adding the ability to change the presence status. • Added §12.3 about managing the user privileges when using Microsoft login • Added §12.5 about managing contact sources
1.13	• Added info about required permissions for mail configuration via Office365 authentication in §12.2 • Added in §12.2 the option for configuring mail without authentication • Added §12.4 for selection between enterprise and group directory
1.12	• Chapter 2, added §2.2, §2.3, §2.4 related to the Microsoft/Webex login flow • Updated section 4.10.1.3 to list search limitations for webexbw login. • Updated §4.8 with option to dial mobile number from F6 • Updated 4.10.4 related to advanced search • Updated image in chapter 8 • Added a note to §12.1 • Updated §12.2 Mail configuration now has test email address field.
1.11	• Added §12.3 in which maintaining the mail templates is described • Updated §4.12 in which the way the maintainable mail templates are being used is described
1.10	• Added §4.12.1 about opening the email form in a new window • Inserted §7.2.4 regarding calling timeout setting and changed picture in §7.2
1.9	• Reorganized § 4 about the contact list. Searching and filtering are now grouped under the same paragraph • Updated §4.11 about editing contacts, to reflect the new way of deleting a personal contact. • Updated §4.13 about contact notes, to reflect the new way of deleting a contact note. • Added § 4.10.3 about saving search queries • Added §4.10.4 about advanced search • Added § 5.9.2 about transferring to other contact numbers • Updated and added text and a new image in § 12.2, you can configure bcc e-mail addresses
1.8	• Updated image in § 7.3 and text and images related to ACD in § 7.3.1.1

1.7	• Added new text and images about sorting favorites in § 4.10.3 • Added text and images in § 7.3.1.1 that the current ACD state is shown in the main menu • Added new shortcuts to key navigation in § 8 • Rewritten § 9.1. Zooming the widget is now maximizing/restoring the widget • Changed the screenshot in § 9.2 and added a note about the content of the widgets not being visible in edit mode. • Added a note in § 9.5.8 about automatically adding https:// to the url of the web page widget
1.6	• Chapter 4 has been rewritten to match all new features in the contact list. • Added § 5.1 about the connection to the server • Added 'Handled by' in § 5.2 • Added § 5.9 about selecting a device to start and answer calls • Updated the image for receptionist status 'Do Not Disturb' in § 6.2 • Added Date/Time format to § 7.1 (Interface preferences) and changed the Preferences picture • Inserted § 9.5.2 about the call flow widget • Added a note about the Google Calendar configuration in § 12.1.2

1.5	• Added text to § 3.1 (Resizing the panels) • Changed text in chapter 4 (The contact list) • Added text about dial pad in § 4.2 (Searching a contact) • Changed the pictures of the presence/hook state in § 4.4 (hook states) • Changed text in § 4.6 (Filtering of contacts) • Added a note to § 4.7.1 and § 4.7.2 that the image might show different fields depending on your edition • § 4.9 of making a contact note has been rewritten • Added § 5.1.4 (Greyed out pickup button) • Changed the introduction of chapter 7, so it no longer sums up the tab pages that are in the preferences popup • Changed title of § 7.1 from Layout preferences into Interface preferences • Added tabbed layout to § 7.1 (Interface preferences) and changed the Preferences picture • Moved text from § 7.2.2 and § 7.2.3 to § 7.4 (Availability) • Changed title of § 7.4 from Profile into Availability • Changed text and pictures in § 9.3 (Adding a widget) • Moved § 9.4.1 (detailed description of the Web page widget) to § 9.5.7 • Elevated § 9.4.2 (URL Placeholders for widget) one level higher to § 9.4 and added destination and context to this paragraph • Added sub paragraphs to § 9.5 (Overview of all widgets), so each widget has its own paragraph • Added text and picture to § 9.5.1 (Calendar widget) • In § 9.5.2 of the contact information widget, the option to show or hide the contact notes was added • Added § 9.5.6 (Twitter widget) • Updated screenshot in § 9.5.7 (Web page widget) and added text about the option to show or hide the border and scrollbar • Changed the text in § 10.3 about the user manual • Added § 10.5 (What's new)
1.4	• Added picture of error code for failed login to § 2 • Changed § 4.1 due to drop-down menu for buttons • Changed § 4.5 due to favorites button now also available in F6 • Added language, added theme Dark and replaced screenshot in § 7.1 • Added § 7.2.5 about Audio Alerting • Updated the screenshot of shortcuts in chapter 8 about keyboard navigation • Updated screenshot in § 9.4.1 due to the new help text and new frame options in the Webpage widget • Renamed startup widget to homepage widget in § 9.5 • Inserted § 10.4 about Application messages

1.3	• Added when a specific feature is only available in a certain edition • Changed description of search box in § 4.2 • Added “Idle”, “Call forwarding” and “Do not disturb” to § 4.4 (hook states) • **Removed § 4.5** about Do Not Disturb. This state is integrated in § 4.4 now. This means § 4.6 to § 4.10 are now shifted up one paragraph • Inserted § 7.3.1.1 (ACD state) • Replaced screenshot in §4.8 (send mail) and added text about field ‘Send from’. • Changed the bold titles in § 5.1 into three subparagraphs: § 5.1.1 (call states), § 5.1.2 (destination information, § 5.1.3 (call actions). Each subparagraph has been given an introductory sentence. • Added ‘call forwarding’ to the possible destination information in 5.1.2 • Rewritten chapter 6 and renamed it from ‘Presence’ to ‘Receptionist status’. • Renamed §7.2.1 from ‘Call handling settings’ to ‘Call handling’ • **Inserted** §7.2.2 (Do not disturb) and §7.2.3 (Forward all calls). This implies that the old §7.2.2 (busy camp on) now has number §7.2.4. Also, that paragraph is renamed from ‘Enable or disable Busy camp on’ to ‘Busy camp on’. • Chapter 11 about sign out has been changed • Inserted chapter 12 (Global configuration)
1.2	• Added ‘Remember username’ to § 2 Login page • Updated an image and text in § 3 Receptionist main screen • Replaced the queue icon in chapter 4 and image in § 4.1 • Added § 4.5 (Do not disturb) • Removed former § 4.5.1 and § 4.5.2 and changed the text of § 4.6 Favorites • Added § 4.7 (Filtering contacts) including § 4.7.1 • Changed text and pictures in the subparagraphs of § 4.8 Editing contacts • Added the language component and changed the image to § 4.9 Sending mail • Added § 4.10 Making a contact note • Added destination, a call state and a call action to § 5.1 • Added text regarding pressing F5 in § 5.5 • Inserted § 5.8 (Calling other numbers of a contact) • Replaced screenshot in § 7.2 (Conversation settings) • Replaced screenshot in § 7.3 (Queue management) • Replaced screenshot in § 7.4 (Profile settings) • Changed text and image in § 9.2 • Added [THEME] placeholder in § 9.4.2 (URL placeholders for widgets) • Changed contact information and contact notes widget text and added calendar widget in § 9.5 • Inserted chapter 10 (Help menu)

1.1	Replaced screenshot and added text about ‘forgot password’ in chapter 2. Replaced screenshot in § 5.1 (Call states and call actions). Also added the action “Decline an incoming call” in the overview of call actions at the red hang up button. Inserted § 5.7 Working with queue calls The old § 5.6 ‘Restriction in picking up queue calls’ is moved to § 5.7.3 Replaced screenshot in § 7.2 (Preferences - Conversation) Inserted new paragraph § 7.3 (Queue management) and moved the old § 7.2.1 (Queue management) there. The text has been altered and the minimum queues has been set to 10 (used to be 5) Inserted paragraph § 5.5 Call recording options
1.0 R6	Replaced the last two images in § 4.6.1 (adding a contact) Replaced both images in § 4.6.2 (editing a contact) Replaced first image in § 4.6.3 (deleting a contact) Updated second image in § 4.7 (Send mail) and updated the text about canceling the mail. Replaced image in § 7.1 (Preferences - Layout) Replaced first image in § 7.2 (Preferences - Conversation) Replaced image in § 7.3 (Preferences - Profile) Fixed spelling “Company wide” → “Companywide”
1.0 R5	Inserted § 4.7 Sending a mail to a contact
1.0 R4	Updated screenshot of conversation settings in § 7.2 Rewritten § 7.2.1 (Queue management) Rewritten and renamed § 7.2.2 (inserted Auto Answer) Removed option 3 from § 5.3 (“Drag and drop” a call to another call (announced transfer)) and changed text and picture in 5.3 point 1. Removed drag & drop text from § 5.5 Changed formulation of ‘directed call pick up’ in § 5,2
1.0 R3	Added contact type / favorite icons to images: - intros of chapter 3 and 4 - paragraphs 3.1, 4.1, 4.3, 4.5, 9.1, 9.2 Updated § 4.4 about presence and hook state and their tool tips Inserted § 5.2 Directed call pickup Updated screenshot of online help in chapter 8 Inserted § 5.5 Conference calls Changed “connected call” icon from green to red in all images where applicable (chapter 3, § 3.1, § 5.3, § 5.4, § 5.5) Renamed “press” to “click on” whenever it involves a button. Added a new way of adding a contact in § 4.6.1 Updated screenshots and description of conference calls § 5.5 Inserted § 4.2.1 restriction of search results depending on license Inserted § 5.6 restriction of picking up queue calls Updated § 7.2 (rewritten queue management) and added 3 sub-paragraphs. Removed explanation about setting presence from chapter 6

1.0 R2	Applied chapter and paragraph numbering Added change history Updated screenshots and some text in § 4.6 (Editing contacts) Temporarily removed § 5.4 (Conference calls) Added chapter 6 about setting your presence Updated § 7.2 (Conversation settings) Added § 7.3 (Profile settings) Updated § 9.4.1 (Web page widget) Temporarily removed § 9.4.2 (Chart widget) Temporarily removed § 9.4.3 (Conversation history widget) Updated § 9.5 (Overview of all widgets)
1.0	Initial version