# Cox Business Web-based Receptionist Console User and Admin Guide



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### Web-based Receptionist Console Overview

Introduction	The Web-based Receptionist Console ("Receptionist Console") is a tool that manages and routes incoming telephone calls for front house receptionists. It provides a robust set of call control features, such as: transfer, call volume, call queues, multiple contact directories, customized call views, Microsoft Outlook Integration, and more.		
	This manual reviews functionality found in Receptionist Console, along with instructions to perform tasks, images of the screens, and descriptions of fields.		
Receptionist Console Technical	To successfully run Receptionist Cons the following web browsers loaded and	ole, your computer needs to have any of 1 operable.	
Specifications	Browser Type	Version	
	Internet Explorer	11.0 only	
	Firefox	Version 54	

Your computer must have Java JRE 1.6 or higher installed before you proceed.



Chrome

**Note**: The minimum required screen resolution for Receptionist Console is 1024 x 768 pixels.

Version 57 and lower



How to Sign In Use the following steps to log in to Receptionist Console.

Step	Action
1.	Open your web browser and enter
	https://console.coxbusiness.com/receptionist in the address bar.
	Result: The Receptionist Console Sign-in page appears.
2.	Enter your (IP Centrex) MyAccount User ID in user@domain format
	and your <b>Password</b> . (Note: If you are unsure of your user ID or
	password, contact your MyAccount administrator.)
3.	(Optional) Check the <b>Stay signed in</b> box to automatically re-connect
	in the event of a disruption to the network connection.
4.	Click the <b>Sign In</b> button.
	<b>Result</b> : Receptionist Console starts and you are signed in.
	(See Figure 1).



User ID Password	7704566001 @coxbusiness.com	
Cox Butinest VoiceManager Receptionist		

**Note**: You may be prompted by your web browser and/or your Java software to allow Receptionist Console to run. Review the details in the prompt and click the **Run** and/or **Allow** buttons to continue. As an option, you can click the **"Do not show this again..."** checkbox to avoid this prompt in the future.



Sign In Options	For this section, look at the links that are located below the Sign in button in
	Figure 1.

**Show Options** link: Enter the domain (the portion after the "@" symbol in the **User ID** field) in the **Append Domain** text box so that you will only need to enter your **username** in that field during subsequent launches. It makes logging in to Receptionist Console quicker.

**Bookmark this page** link: Click to view instructions on how to create a web browser bookmark to the Receptionist Console login page.



### Understanding the Web-based Receptionist Console User Interface

# **Introduction** When you sign in to Receptionist Console, the main page appears. See Figure 2. This is where you perform most of your call management and monitoring tasks. In addition, the main page includes a link to the Settings pages where you configure various Receptionist Console functionality.

### Diagram

The diagram below is the main page of Receptionist Console.



Numeric	Name	Description	
Identifier			
1	Call Console	View and manage your current calls.	
	pane		
2	<b>Queued</b> Calls	Manage calls that have been routed to a Call	
	pane	Queue and are waiting to be answered.	
		(Note: Call Queueing functionality is only	
		available if it has been added and you are	
		logged in to the queue.)	
3	Contacts pane	Create and manage your directories for	
		business and personal associates. Contacts	
		can be categorized by Group, Group	
		Common, Personal, Speed Dial, Outlook,	
		Monitored, and Favorites. (See the next	
		section for a description of each tab.)	
4	Settings pages	Configure specific Receptionist Console	
		functionality.	
5	Call History	View and return previous incoming calls.	
	dialog box		



### Descriptions of Tabs in Contacts Pane

The table below contains a description of each tab in the Contacts pane. Refer to Figure 2 for the location of each tab in the Receptionist Console main window.

Tab Name	Description	
Search	Use the Search tab to locate a contact among all	
	directories.	
Group	Contains a list of contacts and their phone numbers that	
	you have grouped together; for example, Jill's team.	
Group	Contains a list of contacts and their phone numbers that	
Common	the company has grouped together.	
Personal	Contains a list of all non-business associates and their	
	phone numbers.	
Speed Dial	Contains a list of all frequently called contacts and their	
	assigned speed dial number.	
Queues	Displays the calls that are waiting to be addressed.	
Outlook	Contains a list of all business associates and their contact	
	information that is in your company's Microsoft Outlook	
	repository, or are in your personal Outlook directory.	
Monitored	Contains a list of all business associates whose	
	availability status can be watched.	
Favorites	Contains a list of business and non-business associates	
	who you call frequently.	



## **Call Console Functionality**

**Introduction** The first section we will review is the Call Console pane. You use this area of Receptionist Console to view and manage active calls for yourself and others in your organization.

# DiagramThe Call Console title bar includes three controls. They represent, in order<br/>from left to right in Figure 3, the following functionalities: Auto Answer (icon<br/>1), Call Waiting (icon 2), and Call History (icon 3).





Icon Numeric	Description		
Identifier	Description		
1 (Auto Answer)	<ul> <li>When Auto Answer is enabled, your phone automatically goes off-hook when you receive an incoming call. This applies to both inbound and click-to- dial calls initiated from Receptionist Console.</li> <li>To enable or disable Auto Answer, click the icon (number "1" in Figure 3). When enabled, a blue border appears around the icon to indicate that the feature is</li> </ul>		
	active and future incoming calls will be answered		
	automatically.		
	CALL CON SOLE		
	Mary Jones (8000) Active 00:23		
2 (Call Waiting)	Click the Call Waiting icon (number "2" in <b>Figure 3</b> ) in		
	the Call Console title bar to enable or disable the		
	feature. A blue border will appear around the icon to		
	indicate that the feature is active.		



Icon Numeric		Descr	iption	
Identifier				
3 (Call History)	The Call Histo recent phone c	ry function en alls that vou n	ables you to see a nissed, received,	a log of and dialed.
	You can sort th	ne calls by Na	me Number or t	he
	Time/Dete stor	ne cuils by real	alials the column	haadina
	Time/Date star	np when you		neaung.
	Click the Call open the log an view from the	History icon ( nd select the ty <b>Show</b> drop-do	number " <b>3</b> " in <b>Fi</b> ype of calls you w own menu.	gure 3) to vant to
		Figure 4.	Call History dial	og
	Call History			×
		Show Missed Calls	~	
		Missed Calls		
	Name	Received Calls	ne	
	Mary Jones	Dialed Calls	2013 01-23, 14:10:00	
	Mary Jones	8000	2015-01-23, 14:10:00	
	Mary Jones	8000	2015-01-23, 14:09:33	
	Mary Jones	8000	2015-01-23, 14:09:33	=
	Chris Roge	rs 8005	2015-01-23, 13:57:02	
	Chris Roge	rs 8005	2015-01-09, 15:52:04	
	Chris Roge	rs 8005	2015-01-09, 15:49:32	
	Chris Roge	rs 8005	2015-01-09, 15:26:02	
	Chris Roge	rs 8005	2015-01-09, 15:25:49	
	Chris Roge	rs 8005	2015-01-09, 15:25:17	
	Chris Roge	rs 8005	2015-01-09, 15:22:34	
		2005	0	ĸ





## Place a Call

**Introduction** The Dialer field, located at the top of the Call Console, below the header, allows you to make click-to-dial calls that need to be answered on your extension before the call is placed.

You may place an outgoing call when you enter the phone number in the text field and click the keypad icon. (**Note**: The buttons to the right, called *action* buttons, change depending on the context, and allow you to perform operations on calls.) In Figure 5, the **Redial** button appears.

Figure 5	. <u>Dialer</u>	
	CALL CONSOLE	📅 🕆 👺
	5556558785 📀	Redial

Answer Call Your incoming calls appear in the Call Console pane, as is shown in Figure 6.

Figure 6. Call Console pane

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

[Header]	[Header]
Caller ID	The phone number and name of the calling party (if available).
	<b>Note</b> : If an unanswered parked call rings back, the following information appears: Recall: <caller's name="">; via: <call against="" parked="" user=""></call></caller's>
Diversion Caller ID	The name (if available) of the party who diverted (transferred or forwarded) the call to you. If the call was



	diverted more than once, the last party who diverted the call is listed first; the second to last party is listed second;
	and so on.
Call State	A visual representation of the current state of the call.
icon	
Call State	A description of the call's current status.
name	
Call duration	The duration of the call from the time the call was
[Held	received. It accurately reflects how long the call has been
duration]	present in the system. In addition, for held calls, the time a
	call has been on hold is also displayed.
Action	Operations that you can currently take on the call.
buttons	

How to Answer Use the following steps to answer an incoming call.

### a Call

Step	Action
1.	Move the mouse over the call and click the <b>Answer</b> ANS button.
	Result: The call state changes to Active. (Note: You cannot
	double-click the call to answer.)
2.	To answer an incoming call from a Call Notification pop-up
	window, click anywhere on the text in the window.



### **Use Call Pickup, Hold, Resume**

#### Introduction Call Pickup allows you to answer a call that is incoming to another user/extension. This is useful when the user is currently not available to answer the call and allows you to pick up the call instead.



Note: Call Pickup is configured on a per-user basis in MyAccount by any MyAccount adminstrator.

How to Use Use the following steps to answer a phone ringing at another extension. **Call Pickup** Action Step Expand any contact directory and find the contact for which an 1. incoming call is ringing. 2. Click the **Answer** ANS button. How to You can only put an active call on hold. Use the following steps to use Call Hold/Resume Pickup. Calls Step Action To put a call on hold, move the mouse over an active call and 1. alials the Hold HOLD button

	chek the <b>Hold</b> button.
2.	To resume a held call, move the mouse over the call and click
	Answer ANS . (Note: You cannot double-click the call to remove
	it from a Hold status.)

How to End a Call

Click the **button** or hang up the phone to end a call.



### **Conference Call Functionality**

Introduction The **Conference Call** panel displays a current meeting session between three or more people and allows you to manage these types of calls. You can only be involved in one conference call at a time.

Diagram The Call Console panel lists the call legs that make up your current conference. In Figure 7, two calls are waiting to be conferenced, and each two-way call is displayed on a separate line. The information for each call leg is the same as the information that appears for a two-way call.

Figure 7.

Incoming Calls (to be conferenced)

CALL CONSOLE	↔) 101 481			
Enter Number	Transfer Redial			
🚺 Kevin West (8006)	Held 00:36[00:33]			
ANS	S CONF TXR END			
Chris Rogers (8005)	Active 00:20			
	HOLD			
CONFERENCE CALL	×			
No items to show				

Use the following steps to conference two calls.

How to **Conference** a Call

Step	Action
1.	Answer the first incoming calling line and click the <b>Hold</b> HOLD button.
2.	Answer the second incoming calling line and click the <b>Conf</b> button. <b>Result</b> : The two parties are now in conference and appear in the <b>Conference Call</b> pane.

Once the calls are conferenced, they move from the **Call Console** pane to the Conference Call pane. See Figure 8.



Diagram	The header bar contains controls that allow you to manage the conference.				
	Figure	Figure 8. Conference Calls		<u>pane</u>	
		CALL CONSOL	E	🕈 😭 😼	
		🔚 Enter Number		Redial	
			No items to show		

CONFERENCE CALL

🙏 Kevin West (8006)

🙏 Chris Rogers (8005)

Button	Function
Hold Conference button HOLD	Allows you to place the conference
	on hold. Conference participants
	will hear music and will not be able
	to speak to other participants.
Resume Conference button ANS	Allows you to resume a held
	conference. Conference participants
	will no longer hear hold music and
	can continue speaking to other
	participants.
Leave Conference button LEAVE	Allows you to leave the conference.
	This will remove you from the
	conference while allowing the other
	participants to continue the call.
End Conference button END	Allows you to end the conference.

END HOLD LEAVE 🗙

Active 02:20

Active 00:53



### **Queued Calls**

# Introduction Receptionist Console allows you to manage calls in selected queues also known as call centers (up to five) and monitor calls in real time. You manage queued calls through the **Queued Calls** pane.



**Note**: A Call Queue is an optional add-on. MyAccount administrators must assign users to a Call Queue in order to view and manage the Queue in Receptionist Console and receive/answer calls on behalf of the Queue. For more information on how to assign users, look at the Monitored Users section on pages 35.

COX Business*	eptionist							
CALL CONSOLE	🕆 🗄 🖗	CONTACT	S					
Enter Number	Redial	Q SEARCH	FAVORITES X	迄 GROUP 🗴	SROUP COM x	🕻 PERSONAL 🗴	SPEED DIAL X	뎙 QUEUES 🗴
No items to	show		Begi	ns with All		*	0,	_
		Name 🕈	Number + Exte	nsion ‡				
		ABC Co. Q 1	7704568010 8010					
CONFERENCE CALL	×							
No items to	show							
QUEUED CALLS	Yi							
▼ ABC Co. Q 1 7704568010	0/10 (0/5) 🗙							
No items to	show							

Figure 9. Queued Calls panel – screen view

Figure 10.

### <u> Queued Calls panel – panel view</u>





### **Call Queue Management**

Select CallAfter you sign in to Receptionist Console, select the Call Queue(s) you want<br/>to manage (up to five).ManageAfter you sign in to Receptionist Console, select the Call Queue(s) you want

**Steps to Select a** Use the following steps to select a call queue. **Call Queue** 

Step	Action
1.	In the Queued Calls pane, click the Options icon and select the Edit Queue Favorite Dialog option. Result: The Edit Queue Favorites dialog box appears. Figure 11. <u>Queued Calls – Options – Edit</u> <u>Queue Favorite Dialog</u>
	QUEUED CALLS       Yiew         ABC Co. Q 1 7704568010       0/10 (0/5)         Group       Sort         Edit Queue Favorite Dialog
2	Select the check boxes for the Call Queue(s) you want to monitor in Receptionist Console. (If you do not see a Call Queue listed, check with your MyAccount administrator.) Figure 12. <u>Edit Queue Favorites</u>
	Montor       Queue Name       Total Calls       Priority 0       Priority 1       Priority 2       Priority 3         ABC Co. Q 1       10       4       2       2       2         1/ 1 Queue selected (Maximum 5)       Image: Same       Image: Same       Image: Same
3.	Click the <b>Save</b> button. <b>Result</b> : The selected call centers appear in your <b>Queued Calls</b> pane.



# View, Retrieve, and Transfer Queued Calls

Introduction	This section from a que	This section instructs you on how to view a call in a queue, retrieve a call from a queue and transfer a call					
How to View Queued Calls	To view calls in a queue, click the <b>Expand</b> button for that queue.						
How to Retrieve a Call	Use the following steps to retrieve a call from the queue to your phone device.						
from the Queue	Step	Action					
	1.	To retrieve a call from the queue, in the <b>Queued Calls</b> pane,					
		click the call to expand it and click <b>Retrieve</b> for that					
		call.					
	2.	Once you retrieve the call, the call appears in the <b>Call Console</b> ,					
		and you treat it as any other call.					
How to Transfer a	Use the fo	llowing steps to transfer a call from the queue to another number.					
Queued Call	Step	Action					
	1.	In the <b>Queued Calls</b> pane, select the call.					
	2.	In the <b>Dialer</b> , enter the destination number and click the Transfer					
		Transfer button.					
		<b>Result</b> : The call is transferred and removed from the queue.					
		Figure 13. Ad Hoc Queue Transfer					
		CALL CONSOLE					
		Transfer Redial					



How to Transfer Calls	Use the following steps to transfer a call from one queue to another.				
Between Queues	Step	Action			
	1.	In the <b>Queued Calls</b> pane, select the call.			
	2.	In the <b>Contacts</b> pane, expand the <b>Queues</b> tab.			
	3.	Click the target queue and click the <b>Transfer</b> <sup>TXR</sup> button for that queue.			

**Result**: The call is transferred and removed from the original queue.

# **Change Position of Call in Queue**

Use the following steps to change the position of a call in a queue.

Call Queue Position

How to Change

Step	Action						
1.	In the <b>Queued Calls</b> pane, click the call and click <b>Reorder</b> .						
	REORDER						
	Figure 14. Reorder Queued Call						
	<b>MM Super (1000001900)</b> 05:28:39 [05:28:39]						
	Priority 0, Position 4 CC_PRE_Manu (1000001910) REORDER RETREVE						
	Send to Front						
	3						
	Send to Back						
	<b>Note</b> : The list can contain a maximum of 24 reorder positions that you can choose from to reorder a call in the queue, in addition to the <b>Send to Back</b> and <b>Send to</b> <b>Front</b> options.	ie					
2.	In the drop-down box that appears, select the new position in th	e					
	queue.						
	<b>Result</b> : The call is placed at the new position.						



## Sort Queued Calls

Introduction	Queued ca in the curr You must	Queued calls can be sorted according to their <i>total</i> wait time or their wait time <i>in the current priority bucket</i> . Ordering does not work when calls are grouped. You must ungroup them before you can place them in order.						
How to Sort Queued Calls	Use the fo	bllowing steps to sort calls in a queue.						
	Step	Action						
1. In the <b>Oueued Calls</b> pane, click <b>Options</b>								
	2.	Select <b>Sort</b> and then the ordering option you want. ( <b>Note</b> : This operation applies to your view of all call queues in Receptionist Console.)						
		Figure 15. Queued Calls – Options – Sort						



### **Title Bar Tabs**

# **Introduction** This section describes the tabs that are located in the Receptionist Console title bar. Each tab and its function are described in this chapter.



**Important**: If you do not see a certain tab at the top of the Receptionist Console main window, click the drop-down arrow on the right side of the screen (Figure 16) and click to place a check next to the name of the tab you want to see. To remove tabs, click the **X** located at the right of the tab label.



		П	П					7		
C SEA	i. SEARCH 📝 FAXORITES 🛪 者 GROUP 🗴 🔩 GROUP COM. 🔥 FERSONAL 🗴 🧮 SPEED DIAL 🧃 🤹 OUEUES 🗴 🔯 OUTLOOK 🛪 🥙 MOINTORED. 🗴									
		Begins with	All			≪ a		Quick Search	1	FAVORITES
Status ÷	Last Name *	First Name *	Number *	Extension *	Mobile *	Notes ©			ž	GROUP GROUP COMMON
0	Agee	Tyrone	+17704588002	8002		Manager of Sales - NV/ Div			-	PERSONAL
•	Daniels	Wima	+17704568004	8004		Out until Thursday			~	SPEED DIAL
•	Jones	Mary	+17704568000	8000		Notes			~	QUEUES
	Rogers	Chris	+17704568005	8005		Notes			~	OUTLOOK
	inomas	Ricardo	+17704565007	8007		NOISS			~	MONITORED CONTACTS

### Contacts

# **Introduction** The **Contacts** pane contains your contact directories in a tabbed format and allows you to use your contacts to make or manage calls.

Figure 17.	Contacts panel	
------------	----------------	--

C	ONTACT	S																	
	O SEARCH	2	FAVORITES X	4	GROUP	x	8	GROUP COM X	۱¢	PERSONAL X	iii	SPEED DIAL X	1	QUEUES X	0	OUTLOOK X	2	MONITOR	ED X
ľ								Begins	with	c	٦	×							
	itatus		Name									Directory							

The **Contacts** pane contains the following areas

Search tab	Group Common tab	Queues tab
Favorites tab	Personal tab	Outlook tab
Group tab	Speed Dial tab	Monitored Contacts tab





### **Manage Personal Contacts**

Introduction	You can add or remove personal contacts via your MyAccount Contact List or
	in Receptionist Console, and the updates appear in both places.

### Add a Personal Contact

Note About Personal Contacts



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

How to Add a Personal Contact Use the following steps to add a personal contact.

Step	Action						
1.	In the <b>Personal</b> tab, click <b>Edit</b> . The <b>Edit Personal Contacts</b> dialog box appears.						
	Figure 18. Personal tab						
	C       SEARCH       2*       FAVORITES X       2       GROUP X       C       PERSONAL X       ## SPEED DIAL Y       C       Ouclus X       Image: C         Begins with       All       Image: C       Ouclus Search       X       Image: C       Ouclus Search       X       Image: C       Image: C						
2.	Click <b>Add</b> . A new line is added below the existing entries,						
	allowing you to define a new entry.						
	Figure 19. Edit Personal Contacts - Add Entry						
	Edit Personal Contacts x Modify your personal contacts						
	Name Number						
	Dr. Smithson 5552348821 Gail Jensen 5558829201						
	Paul Bartholomew     O     5553358002						
	+ Add N Dekte						
3.	In the <b>Name</b> text box, enter the contact's name or description, as						
	you want it to appear.						
4.	In the <b>Number</b> text box, enter the phone number of the contact.						





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

## **Delete a Personal Contact**

How to Delete a Personal	Use the fo	ollowing steps to delete a personal contact.
Contact	Step	Action
	1.	In the <b>Personal</b> tab, click <b>Edit</b> . The <b>Edit Personal Contacts</b> dialog box appears.
	2.	Select the entry to delete and click the <b>Delete</b> button. <b>Result</b> : The entry is removed from the list.



### Search

# **Introduction** Receptionist allows you to search for contacts multiple ways. You can perform a search on a specific directory or on all directories at once. You can perform a regular search or a quick search, and you can create a new directory from search results.



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

	Figu	re 20. <u>s</u>	Search tab				
Q SEARCH	🕹 GROUP 🗴	SROUP COM X	CAL PERSONAL X	SPEED DIAL X	CE QUEUES X	OUTLOOK :	x 🖉 MONITOR
				Begins v	with	a	×
Status	Name						Directory

### **Quick Search**

**Introduction** A quick search searches on a specific column in a selected directory for entries that start with a character entered by you. The column on which the search is performed is the column by which the directory is currently ordered.

A quick search can be performed on any directory, but is not available in the **Search** tab.





How to Perform a	Use the fo	bllowing steps to perform a Quick Search.
Quick Search	Step	Action
	1.	Click the directory tab where you want to perform the search.
	2.	Order the directory by the column on which you want to perform
		the search.
	3.	Check the <b>Quick Search</b> box. See Figure 21.
	4.	From the keypad that appears, select a character (a single letter or
		digit) by which you want to search. The contacts that start with
		the selected character (in the selected column) are displayed in

To perform another search on the same column, select another

and not on the results of the previous search.

character. The new search is performed on the original directory

the directory.

5.

Web-Based Receptionist Console User Guide



# **Regular Search**

## Introduction You can search for contacts in a specific directory or in all directories at once. When you use the **Search** tab, the search is always performed on all directories and columns.

When you search for contacts in a specific directory (by using the search options in each tab), you can search on a specific column or on all columns.



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

Figure 22. Regular Search

🔍 SEARCH 🏾 🎦 FAVOR	RITES X 🕹 GROUP X	GROUP COM 🤉	C CL PERSONAL	- X 🧮 SF	EED DIAL )	( 📢 🤇		
ze 🖌 Begins w	rith All	<b>~</b> α	▼ Q. Quick Search					
Status	Last Name ‡	First Name 🕈	Number	Extension	Mobile	Notes		
	Blue	Zelda	+17704568003	8003		<u>Notes</u>		

Step	Action			
1.	Select the directory.			
2.	Make sure that the <b>Quick Search</b> box is unchecked.			
3.	In the <b>Search</b> text box, enter the text for which you want to			
	search. You can enter partial information, such as part of a name			
	or phone number, but you must enter at least two characters. For			
	example, if you do not remember whether Mary's last name is			
	spelled "Shelley" or "Shelly", you can enter "Shell", and either			
	name is returned.			
4.	To restrict the search to contacts that start with the entered string,			
	check the <b>Begins with</b> box. Otherwise, the search results also			
	include contacts that contain the entered string.			
5.	From the drop-down list, select the column by which you want to			
	search. You can select a specific column or all columns.			
6.	Click the <b>Search</b> button .			
	• The text you entered is matched against the selected column (or all columns) of every entry of the selected directory. Search results are displayed in the tab where the search was performed			

# How to Search<br/>in a SpecificUse the following steps to search in a specific directory.DirectoryStep



	• Duplicate search results in Receptionist Console directories are not displayed; the first match for a given contact is displayed.
	• Duplicate search results in other directories are displayed.
	• The search returns either all the contacts (in the selected directory) that contain the entered keyword or all the contacts that start with the entered keyword.
	• In the first case ( <b>Begins with</b> not checked), entering "Ann" returns all contacts with the name "Ann", but it also returns all contacts with names such as "Anne", "Marianne", "Marie Ann", "Ann Marie", and so on.
	• In the second case ( <b>Begins with</b> checked), entering "Ann" returns all contacts with names such as "Ann", Anne", and Ann Marie", but not "Marianne" or "Mary Ann".
7.	To clear the search results, click <b>Reset</b> $\bowtie$ .



### Diagram

Figure 23	Contacts Pane -	Search	Results in	Search	tah
i iyule 23.	Contacts Fane -	Jeartin	Results III	Search	เลม

🔍 SEARCH	🔏 FAVORITES 🗴 👗	GROUP x 🔌	GROUP COM X 🕻 🖞 PE	RSONAL X	SPEED DIAL X
d*			✓ Begins with	٩	×
Status	Name	Directory			
$\bigcirc$	Wilma Daniels	GROUP			
<b></b>	John Doe	GROUP			

How to Search in All **Directories** 

Use the following steps to search in all directories.

Step	Action			
1.	Click the <b>Search</b> tab.			
2.	In the <b>Search</b> text box, enter the text for which you want to search. You can enter partial information, such as part of a name or phone number, but you must enter at least two characters.			
	For example, if you do not remember whether Mary's last name is spelled "Shelley" or "Shelly", you can enter "Shell", and either name is returned.			
3.	To restrict the search to contacts that start with the entered string, check the <b>Begins with</b> box. Otherwise, the search results also include contacts that contain the entered string.			
4.	Click the <b>Search</b> button . The text you enter is matched against all columns in all directories (except for the <b>Notes</b> column). Search results are displayed in the Search tab.			

Duplicate search results in Cox directories are not displayed; the first match for a given contact is displayed. Duplicate search results in other directories are displayed.

When you click a contact, the entry expands and displays contact details. The information depends on the directory for which the contact was selected.

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



### **Create Directory from Search Results**

### Introduction

When you perform a search in a directory, you can create a new directory (on a dedicated tab) from the search results, using the Pullout button. The button is enabled when a search is performed on a single field.



**Note**: The Pullout button is not available in the Search directory and is only available from the search results of a specific directory.

How to Create a Directory from Search Results Use the following steps to create a directory from search results using the Pullout button.

Step	Action
1.	Select the directory where you want to perform the search.
2.	Perform a Quick Search or enter the search criteria.
3.	When the results are displayed, click the <b>Pullout</b> button which becomes active. <b>Result</b> : A new tab is created that includes the results of the search.

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





## **Perform Search on Search Results**

Introduction -	If you perform a search in a specific directory, the search is always performed on the entire directory even if search results are only displayed.				
How to Perform a Search on	After you perform the original search, create a directory from the search results.				
Search Results	Perform a new search in the new directory.				
	<b>Note</b> : Searching within the search results cannot be performed on the same column that the original search was performed.				



## **Order Directory Entries**

#### 



Note: You cannot order the contacts in the Search directory.

How to Sort the<br/>Order of<br/>DirectoryThe sorting order for the Status column is as follows (from highest to lowest):<br/>Private, On a Call, Ringing, Away, In a Meeting, Call Forwarding Always,<br/>Do Not Disturb, and Available.Entries

Use the following steps to order a directory.

Step	Action			
1.	Click the header of the column by which you want to order the			
	directory.			
2.	To reverse the order, click the same column header again.			



**Note**: The contacts in the selected directory are reordered based on the selected column. The sort order is saved on sign-out and preserved between sessions.



### Diagram

### Figure 24. Directory Sort arrows

Q SE	🔍 SEARCH 🛛 🏠 FAVORITES X 🕹 GROUP X 🍇 GROUP COM X 🕼 PERSONAL X 🚆 SPEED DIAL X 🥊 QUEUES X 🧿 OUTLOOK X							
	Begins with All 🗸							
Status	Last Name 🕈	First Name ≑	Number	Extension	Mobile	Notes		
$\bigcirc$	4016152095	Auto Attendant	+14016152095	2095		Notes		
$\bigcirc$	4016158373	Call Center	+14016158373	8373		Notes		
$\bigcirc$	Hill	Sally	+14016152145	2145		Notes		
$\bigcirc$	Sales	Group Paging		1212		Notes		
$\bigcirc$	SIs1	Hunt Group	+14016153541	3541		Notes		
$\bigcirc$	Unassigned	Unassigned	+14016152103	2103		Notes		
$\bigcirc$	Voice Portal	Voice Messaging Group		9999		Notes		
$\bigcirc$	White	Harry	+14016152116			Notes		

Directory	Sort Columns	Default Sort Column	
Group	First Name, Last Name	Last Name	
Favorites	First Name, Last	Last Name	
	Name, Number,		
	Mobile, Extension,		
	Notes, Status		
Group Common	Name, Number	Name	
Personal	Name, Number	Name	
Speed Dial	Code, Description,	Code	
	Number		
Queues	Name, Number,	Name	
	Extension, Department		
Custom	First Name, Last	Last Name	
	Name, Department		
Outlook	Last Name, First	Last Name	
	Name, Number,		
	Mobile, Home Phone		
Monitored Contacts	First Name, Last	Last Name	
	Name, Number,		
	Mobile, Extension,		
	Notes, Department,		
	Status, IM		


#### **Contact Notes**

Introduction	Reception Group, Fa quickly sto	ist Console allows you to make notes about the contacts in your <b>avorites,</b> or <b>Monitored Contacts</b> directory. Notes are designed to ore and provide brief information about the contact.
How to Create a Note about a	Use the fo	llowing steps to create notes about a contact.
Contact	Step	Action
	1.	Open one of the directories and click the Notes link on the contact's line item. <b>Result</b> : The Notes for <contact name=""> dialog box appears.</contact>
	2.	Enter the desired text or view or modify the existing text in the <b>Notes</b> text box.
		Figure 25. <u>Notes field</u>
	3.	To save your changes and close the dialog box, click the <b>OK</b> button. <b>Result</b> : The note appears in the contact's line item in the Notes column. Figure 26. <u>Notes</u> <u> </u>
	4.	To close the dialog box without saving, click <b>Cancel</b> button.



#### Monitoring

# Introduction Receptionist Console allows you to monitor the call state of selected users/extensions within your organization. This information is helpful for making call transferring decisions because you know if a user is currently on a call (red) or not (green).

All editions of Receptionist Console allow you to monitor contacts configured through the web portal. This is referred to as static monitoring. In addition, Receptionist Console allows you to monitor selected contacts dynamically. Each type is discussed in the following pages.

#### Diagram

Figure 27.	<b>Monitored</b>	<b>Contacts</b>
-		

CONT	ACTS								
Q SE	ARCH 🛛 🙇 GRC	DUP x 🍇 C	ROUP COM X	y PERSON/	AL X 🛄	SPEED DIAL X	🕞 QUEUES 🗴 🤇	) outlook x	🖉 MONITORED 🗴
		Begins with	All				<b>v</b> Q		
Status ‡	Last Name 🕈	First Name 🕈	Number ‡	Extension *	Mobile ‡	Department *	Notes ‡		
	Agee	Tyrone	+17704568002	8002			Notes		
	Blue	Zelda	+17704568003	)3 8003			Notes		
$\bigcirc$	Daniels	Wilma	+17704568004	8004			Notes		
	Doe	John	+17704568009	8009			Notes		
	Jones	Mary	+17704568000	8000			Notes		
	Rogers	Chris +1		8005			Notes		
$\bigcirc$	Smith	Alice +177		8001			Notes		
	Thomas	Ricardo	+17704568007	8007			Notes		
	West	Kevin	+17704568006	8006			Notes		



Note: The contact's "state" is updated in real time.



#### **Static Monitoring – Favorites Tab**

**Introduction** Static monitoring is a fixed list of users that is configured by your MyAccount Administrator and includes people or extensions whose phone call status can be monitored in Receptionist Console.

The **Favorites** tab allows you to view the phone state of *statically* monitored contacts. The **Favorites** directory provides the following information for each contact (as applicable): call state, last and first name, phone number, extension, mobile number, department, and link to notes.

Any updates that you make to the list will appear in Receptionist Console the next time you log on.

Q SEAF	RCH	RITES X	GROUP 🗴 🥸 GRO	DUP COM	PERSONAL	x 👖 SPEED DIAL 🤉 📢		
	Begins with All							
Status ‡	Last Name 🕈	First Name 🕈	Number \$	Extension *	Mobile \$	Notes ‡		
	Agee	Tyrone	+17704568002	8002		Manager of Sales - NW Div		
	Daniels	Wilma	+17704568004	8004		Out until Thursday		
	Jones Mary		+17704568000	8000		<u>Notes</u>		
	Rogers	Rogers Chris		8005		<u>Notes</u>		
$\bigcirc$	Thomas	Ricardo	+17704568007	8007		<u>Notes</u>		

Figure 28. Favorites tab



**Important**: The maximum number of users you can monitor is configured by your administrator and cannot exceed 100.If a contact is *statically* monitored, then their phone state is displayed. However, it counts toward the total number of *dynamically* monitored contacts. Therefore, we recommend that you monitor less than the max amount of users (regardless of their "status").

Users are monitored as they are selected up to the maximum allowed, and then ordered in a "first in/first out" as other contacts are added. Dynamic monitoring is persistent, but not permanent and could be lost during certain server events (upgrades, restarts, etc), unlike static monitoring.



#### **Dynamic Monitoring – Group Tab**

# Introduction Dynamic Monitoring allows you to view the call state of selected contacts in your **Group** directory. First, select a contact you want to monitor. (Note: Selected contacts cannot be de-selected.) It is also important to note that there is a pre-configured limit of contacts you can select to monitor and we recommend that you leave a few slots open so that other contacts can be added.

When the number of monitored contacts reaches the threshold, Receptionist Console changes the selection based on a "first in/first out" order. Therefore, those contacts that were selected originally are no longer monitored which allows for newly selected contacts to be monitored.

The state of a contact that is not monitored displays as Unknown.



**Caution**: Dynamic monitoring is persistent, but not permanent and can be lost during certain server events, such as upgrades and restarts.

Unlike Static Monitoring, Dynamic Monitoring is performed as needed on the Receptionist Console client by selecting users from a directory. Monitoring begins when you choose the contact. If you click the contact a second time, monitoring stops.

CON	TACTS						
Q	SEARCH	🕈 FAVORITES :	x 👗 GROU	P x 👔	S GROUP COM	x 🌿 PER	SONAL
		Begins with Al		a	Quick S	earch	× Ø
Stat	Last Name 🕈	First Name 🗘	Number	Exten	Mobile	Department *	Notes
$\bigcirc$	Baldwin	Cheryl	+12025551009	1009			<u>On va</u>
$\bigcirc$	basicAA	Auto Attendant	+12025551036	1036			Notes
	Bueno	Mario	+12025551001	1001	2021112223		Notes
	Dumas	Marie	+12025551005	1005			Notes
$\bigcirc$	Graves	Lena	+12025551022	1022			Notes
$\bigcirc$	Hotline	Call Center	+12025551000	1000			Notes
0	Jones	Shirley	+12025551002	1002			Notes
•	Maldini	Paolo	+12025551003	1003			Notes
$\bigcirc$	Rodriguez	Melody	+12025551030	1030			Notes
$\bigcirc$	Smith	Stan	+12025551004	1004	2021234567		Notes
$\bigcirc$	Sparks	Bryan	+12025551014	1014			Notes
$\bigcirc$	standardAA	Auto Attendant					Notes
$\bigcirc$	Technical Sup	Call Center					Notes
$\bigcirc$	Voice Portal	Voice Messag	+12025551021	1021			Notes
$\bigcirc$	Wyoming	Madoline	+12025551008	1008	2405557777		Notes

Figure 29. Group Directory with Monitored Contacts





#### **Request Dynamic Monitoring**

#### **Introduction** Dynamic monitoring is performed dynamically on Receptionist Console by selecting a user from a directory.

When you click on a user, the monitoring process begins and their call status is displayed. If you click the contact again, monitoring stops.

How to Monitor a Contact Use the following steps to monitor a dynamic contact.

StepAction1.Click the Group tab to view the directory.2.Click the Status icon of the contact to monitor.



**Note**: You cannot monitor the state of virtual users, hunt groups, or auto attendants because they appear as disabled.

#### Figure 30. Group Directory – Request Contact Monitoring

CON	TACTS							
Q	SEARCH	🕈 FAVORITES :	x 😕 GROU	Рх	SROUP COM	x 🌿 PEF	SONAL	
🛛 Begins with 📶 🚽 🔍 📔 Guick Search 🛛 🗶 🗵								
Stat	Last Name 🗘	First Name 🕈	Number	Exten	Mobile	Department *	Notes	
$\bigcirc$	Baldwin	Cheryl	+12025551009	1009			<u>On va</u>	
$\bigcirc$	basicAA	Auto Attendant	+12025551036	1036			Notes	
•	Bueno	Mario	+12025551001	1001	2021112223		Notes	
	Dumas	Marie	+12025551005	1005			Notes	
0	Graves	Lena	+12025551022	1022			Notes	
$\bigcirc$	Hotline	Call Center	+12025551000	1000			Notes	
•	Jones	Shirley	+12025551002	1002			Notes	
•	Maldini	Paolo	+12025551003	1003			Notes	
R	Rodriguez	Melody	+12025551030	1030			Notes	
9	Smith	Stan	+12025551004	1004	2021234567		Notes	
0	Sparks	Bryan	+12025551014	1014			Notes	
0	standardAA	Auto Attendant					Notes	
0	Technical Sup	Call Center					Notes	
$\bigcirc$	Voice Portal	Voice Messag	+12025551021	1021			Notes	
$\bigcirc$	Wyoming	Madoline	+12025551008	1008	2405557777		Notes	



#### **Contact States**

## Introduction The state of a contact is represented by an icon located to the left of the contact's name. This state integrates the state of the contact's line, the contact's Microsoft Exchange calendar presence, and the state of services such as Call Forwarding Always, Do Not Disturb, and Privacy.

Icon	State in Receptionist Console	DND	CFA	Privacy	Exchange Calendar State*	Call State
0	Private	N/A	N/A	On	N/A	N/A
0	On a Call	N/A	N/A	Off	N/A	Active call
0	Ringing	N/A	N/A	Off	N/A	Ringing call, no active calls
$\bigcirc$	Away	N/A	N/A	Off	Out of Office	No active calls
0	In a Meeting	N/A	N/A	Off	Busy	No active calls
••	Call Forwarding Always	N/A	On	Off	Free or Tentative	No active calls
•	Do Not Disturb	On	Off	Off	Free or Tentative	No active calls
	Available	Off	Off	Off	Free or Tentative	No active calls
$\bigcirc$	Unknown	N/A	N/A	N/A	N/A	N/A

The following table lists call states for contacts or extensions:



**Note**: If a call is parked against the contact that you are monitoring, the information about the parked call also appears.



#### **Group Common**

#### **Introduction** This consists of all contacts in your organization's common phone list configured by your MyAccount administrator.



**Note**: The directory may be empty if your administrator has not configured any contacts.

	Fi	igu	re 31	•	<u>Gro</u>	up Comr	nc	on tab							
Q SEARCH	FAVORITES X	2	GROUP X	1	GROUP COM X	CA PERSONAL X		SPEED DIAL X	5	QUEUES X	0	OUTLOOK X	8	MONITORED	x
	Begins	with	All				~	a						Ĩ	Qui
Name ÷				Num	ber ≎										
										No items	to sh	W/			

#### Personal

**Introduction** This consists of all contacts in your personal directory in MyAccount.

Figure	32. Personal (contacts) tab
🔍 SEARCH 🏼 🏄 FAV	DRITES X 🏻 🚵 GROUP X 🔄 GROUP COM X 😪 PERSONAL X
	Begins with All
Name 🕈	Number 🕈
Chris Johnson	5557669042
Jim Smithson	5555128745
Tina Craft	5559875562



#### Speed Dial

**Introduction** This section consists of all speed dial codes configured for you or by you for your Speed Dial services.

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

Figure 33. Speed Dial tab

CONTACTS		
FAVORITES 🗴 🕹 GROUP 🗴	SROUP COM 🗴 📢 PEF	RSONAL X 🚻 SPEED DIAL X 💌
Begins with	n All 🚽 🔍 🗌	Quick Search 🛛 🛛 🖊 🖉 🥖
Code <sup>‡</sup>	Phone Number +	Description +
2	2023111434	Daycare
3	9051232432	Chris mobile
4	3204567677	Golf Club
5	2405678564	Garage
6	3035674565	Dad

You can add or remove speed dial entries via MyAccount or Receptionist Console, and the updates appear in both places. However, the updates that you make via MyAccount appear only at the next sign-in to Receptionist Console.

#### Procedure

Use the following steps to update speed dial entries using the client.

Step	Action
1.	Add Speed Dial Entry (See below)
2.	Modify Speed Dial Entry (See below)
3.	Delete Speed Dial Entry (See below)



#### Add Speed Dial Entry

How to Add a<br/>Speed DialUse the following steps to add a speed dial entry.EntryStep

Step	Action
1.	In the <b>Speed Dial</b> tab, click <b>Edit</b> . <b>Result</b> : The <b>Edit Speed Dials</b> dialog box appears.
2.	Click the <b>Add</b> button. <b>Result</b> : A new line is added below the existing entries, allowing you to define a new entry.
	Figure 34. Add New Speed Dial entries
	Edit Speed Dials × Modify your speed dial lists:
	Code       Phone Number       Description         3       5552380993       Sales - Central         4       5558773098       Mktg - Central         5       5556672311       Sales - NE Reg         6       5555652018       Mktg - NE Reg         #01       5559983344       Gen Mgr         2       •       •         3       •       •         4       •       •         2       •       •         3       •       •         4       •       •         5       •       •         6       •       •         7       •       •         8       •       •         9       •       •         #00       #01       •         #01       •       •         #02       •       •         #03       •       •
	#05 #06 #07 #08 #09 #10
3.	From the <b>Code</b> drop-down list on the left, select a speed dial code.
4.	In the <b>Phone Number</b> text box, enter the phone number to assign to the code.
5.	In the <b>Description</b> text box, enter a description that allows you to identify the entry.
6.	To save the entry, click anywhere in the dialog box outside the entry.



#### **Modify Speed Dial Entry**

How to Modify a Speed Dial	Use the fo	llowing step	s to chang	ge a speed dial e	ntry.			
Entry	Step		Action					
	1.	In the <b>Speed Dial</b> tab, click the <b>Edit</b> button. <b>Result</b> : The <b>Edit Speed Dials</b> dialog box appears.						
			Figure 35. <u>Edit Speed Dials Dialog Box –</u> <u>Modify Entry</u>					
			Edit Speed Dials	9051232432	Chris mobile	×		
			Modify your spe	eed dial lists:				
			Code	Phone Number	Description			
			2	2023111434	Daycare			
			3	9051232432	Chris - mobile			
			4	3204567677	Golf Club			
			5	2405678564	Garage			
			6	3035674565	Dad			
					🕂 Add 🔀 Dele	te		
	2.	Double-cli	ck the ent	ry to modify.				
	3.	Modify inf	formation	as required.				
	4.	To save the entry.	e changes,	, click anywhere	in the dialog bo	x outside the		

#### **Delete Speed Dial Entry**

Entry	Sten	Action
Speed Dial		
How to Delete a	Use the fol	llowing steps to delete an entry from your speed dial.

Step	Action
1.	
	In the <b>Speed Dial</b> tab, click the <b>Edit</b> icon.
	<b>Result</b> : The <b>Edit Speed Dials</b> dialog box appears.
2.	Select the entry to delete and click the <b>Delete</b> button.
	<b>Result</b> : The entry is removed from the list.



#### Outlook

#### **Introduction** The Outlook pane contains all of your Outlook contacts. (**Note**: You need to have Outlook Integration service assigned.)



**Note**: When using the Outlook Integration feature with Microsoft Outlook 2010 or Outlook 2013 (32- or 64-bit edition), make sure Outlook is running before Receptionist Console is launched; otherwise, Outlook Integration functionality does not work.

#### Figure 36. Outlook tab

Q SEARCH	FAVORITES X	迄 GROUP 🗴 🔽 🤇	GROUP COM X	CA PERSONAL X	SPEED DIAL X	CE QUEUES X 🗿 OUTLOOK X
	Begins wi	th All			a	
Last Name 🗘	First Name ‡	Number ‡	Mobile ‡	Home Phone \$		
						Loading data



#### **Receptionist Console**

#### **Basic Configuration Settings**

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



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

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

- General
- Application
- Services
- Plug-ins
- About

#### Figure 37. Settings toolbar



Settings | Help | Full Screen | Sign Out

**Note**: Depending on your system configuration, some settings may not be available.



#### **General Tab**

Introduction	You use the General tab to configure miscellaneous settings that improve the usability of Receptionist Console. Figure 38. <u>Settings – General</u>					
Diagram						
	General         Application         Services         Plug-ins         About					
	General					
	Language English (US)					
	Screen Pop Enter URL Auto pop incoming calls					
	Date Format					
	Time Format					
	Workspace Save Workspace Load Workspace Restore Workspace					
	Drag and Drop Transfer the call automatically when it's dropped on a contact					

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

Part	Description
Screen Pop	Screen pop ups are not supported at this time.
Date Format	<ul> <li>This setting allows you to select the format to use for displaying the date in the calendar details for a contact. The possible options are:</li> <li>MM/DD/YYYY</li> <li>DD/MM/YYYY</li> </ul>
Time Format	<ul> <li>This setting allows you to select the format to use for displaying the time in chat windows and in the calendar details for a contact. The possible options are:</li> <li>AM/PM</li> <li>24 hours</li> </ul>



Workspace	Receptionist Console allows you to customize elements of your workspace, such as the size and placement of the main window on the desktop. The system remembers the setup between sessions.
	<ul> <li>The following elements can be customized:</li> <li>The size and position of the web browser window in which the main interface is displayed</li> </ul>
	• The size of the panes (Call Console, Contacts, and Queued Calls)
	<b>Notes</b> : This functionality does not work in Internet Explorer due to a technical limitation of Internet Explorer.
	When a window is vertically resized, the panes do not always resize to fill the window. To resize a window, drag the window from the bottom right-hand corner or collapse and then expand the panes after resizing to adjust them to the window.
	• Save Workspace – This button, when clicked, saves the current workspace.
	• Load Workspace – This button, when clicked, arranges your workspace according to the last saved configuration.
	• <b>Restore Workspace</b> – This button, when clicked, restores the workspace to the system default configuration.
	<ul> <li>Always save workspace on sign out – When you sign out from the client, Receptionist Console asks you whether you</li> </ul>





	want to save your current workspace. To save your workspace automatically when signing out without being asked, check the <b>Always save workspace on sign out</b> box.
	To customize your workspace: Arrange the windows the way you like. Click the <b>Save Workspace</b> button to save the current configuration. To restore the system default, click <b>Restore Workspace</b> . At any time to return to the last saved configuration, click the <b>Load Workspace</b> button.
Drag and Drop	You use the <b>Drag and Drop</b> area to specify whether a call should be automatically transferred when dropped on a contact.
	<b>Transfer the call automatically when it's</b> <b>dropped on a contact</b> – This setting allows you to enable or disable automatic call transfer when you drag and drop. When this box is checked, the call is automatically transferred to the contact's phone number when the call is dropped on the contact.



#### **Settings - Application**

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

#### Diagram



General	Application	Services	Plug-ins	About				
Applicatio	on							
Queue Mer	mberships			0.01	Number 7704568010		Wrap-Up Policy	
					110100010			
Operator P	Policies		Post Sign-In A	ACD State : Ava	ilable	~		

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

Part		Description		
Queue Membership	These settings allow you to select which queues			
	you want to join.			
	Step	Action		
	1.	To join a <b>specific</b> queue, select the		
		check box on the line for the queue.		
	2.	To join all queues, select the check		
		box in the column header.		
	<b>Note</b> : If you are not allowed to join/leave a queue, the line for the queue is dimmed and you can only view your join status in the queue. To change your join status in a queue, you may need to contact your administrator.			
	For queues on this page, you can select columns			
	to appear and you can sort and group queues by			
	any column.			
Operator Policies	The <b>Operator Policies</b> setting allows you to			
	select your post sign-in state in your queues.			



Post Sign-In All Call	This drop-down list allows you to select your
<b>Distribution (ACD)</b>	availability to receive calls from queues when
State	you sign in to Receptionist Console.



#### **Settings - Services**

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

Diagram

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

	Figure 40. <u>Settings – Services</u>
General Application	Services Plug-ins About
Services	
🟳 Default	Inactive
	Do Not Disturb Blocks all calls and sends them to voice mail Cell Foundation & human
	Forwards all calls to a destination
	Service Settings

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

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



Use the following steps to activate a service.

How to Activate a Service

Step	Action
1.	Select the service and check the Active box. The service is
	moved from the <b>Inactive</b> to <b>Active</b> category.
2.	If you enabled the Call Forwarding Always service, in the
	Forward To text box that appears, enter the phone number to
	which your calls are forwarded.
3.	To generate a ring splash for incoming calls, check the <b>Ring</b>
	Splash option.
4.	To save your changes, click <b>Save</b> .



#### **Settings – Plug-ins**

### Introduction The Receptionist Console uses plugins that must be configured for cetain functionalities in the client, such as (call) Notification, Outlook Integration, and Call Event Log.

Instructions to configure the plug-ins are located in Appendix A: Steps for Using Plug-Ins.

Diagram

Figure 41. Settings – Plug-ins

Plug-ins	Disable All Plug-ins		
Notification	Focus window for incoming calls		
	Show notifications for calls when auto answer is off		
Microsoft <sup>®</sup> Outlook <sup>®</sup>	Disable Outlook Integration		
	Retrieve contacts from : Default Contact Folder		
	Use Outlook contacts as preferred CLID lookup		
Program Shortcuts	Add Shortcut Remove Shortcut		

Part	Description		
Plug-ins	Before you begin, you must uncheck this box to		
	enable configuration for certain plug-ins.		
Notification	These options control when and how incoming call notification "pop-up toasts" are displayed.		
	<ul> <li>Focus window for incoming calls – When this option is checked and the browser window running Receptionist Console is minimized, the system automatically restores the window on incoming calls.</li> </ul>		



	1				
	<ul> <li>This does not work in Firefox. In Internet Explorer, there must be only one tab open in the web browser running Receptionist Console.</li> <li>Show notifications for calls – When this option is checked, Receptionist Console displays the Call Notification pop-up window on top of other applications' windows when you receive a call. When you check this box, you need to select an option from the drop-down list to specify the condition under which notifications are displayed.</li> </ul>				
	This does not work the same web brow Console. In addition seconds of each ot up window only appresentes.	k if there are other tabs open in wser window as Receptionist on, if calls come within eight her, the <b>Call Notification</b> pop- ppears for the first call of that			
Microsoft Outlook	<ul> <li>The Microsoft Outlook options control Outlook integration with Receptionist Console. They are only visible if Outlook integration is enabled in Receptionist Console. Use extreme caution when configuring this function.</li> <li>You can receive your contacts from the default contact folder. If you are part of a very large organization, use your local contacts instead of the "global" Outlook contacts.</li> </ul>				
		an set are as follows.			
	Part	Function			
	Enable/Disable	This determines whether Receptionist Consola			
	Integration	integrates with Outlook to			
	integration	provide you with access to			
		your Outlook contacts. If			
		Outlook integration is			
		disabled, the corresponding			
		aesktop plug-in software			
		downloaded from Cox			
	Retrieve	This option allows you to			
	contacts from	specify where to look for			
		vour Outlook contacts			



	Use Outlook	When this option is		
	contacts as	checked, Receptionist		
	preferred	Console uses Outlook to try		
	CLID looku	<b>p</b> to identify a caller, when the		
		caller ID is unknown.		
	Note:	The Outlook Integration feature		
	provid	es the following functionality:		
	CLID lookup, saving vCards, and			
	access	accessing and searching Outlook contacts. When using Microsoft Outlook		
	contac			
	2010 c	or 2013 (32- or 64-bit edition).		
	Outloo	ok has to be running <i>before</i>		
	Recen	tionist Console is launched for		
	these f	functions to work.		
Program Shortcuts	The Program	Shortcuts plug-in allows you to		
	create a deskt	op shortcut on a Windows platform		
	which launche	es Receptionist Console in your		
	default web b	default web browser when you click the icon		
	Button	Function		
	Name			
	Add	Click this button to create a		
	1144			
1	Shortcut	Receptionist Console shortcut on		
	Shortcut	Receptionist Console shortcut on your desktop		
	Shortcut Remove	Receptionist Console shortcut on your desktop.		
	Shortcut Remove Shortcut	Receptionist Console shortcut on your desktop. Click this button to remove the previously created Receptionist		
	Shortcut Remove Shortcut	Receptionist Console shortcut on your desktop. Click this button to remove the previously created Receptionist Console shortcut		
	Shortcut Remove Shortcut	Receptionist Console shortcut on your desktop. Click this button to remove the previously created Receptionist Console shortcut.		
	Shortcut Remove Shortcut	Receptionist Console shortcut on your desktop. Click this button to remove the previously created Receptionist Console shortcut.		
	Shortcut Remove Shortcut	Receptionist Console shortcut on your desktop. Click this button to remove the previously created Receptionist Console shortcut. If you did not create a shortcut using the Add Shortcut button		
	Shortcut Remove Shortcut	Receptionist Console shortcut on your desktop. Click this button to remove the previously created Receptionist Console shortcut. If you did not create a shortcut using the Add Shortcut button, the Remove Shortcut button has		
	Shortcut Remove Shortcut	Receptionist Console shortcut on your desktop. Click this button to remove the previously created Receptionist Console shortcut. If you did not create a shortcut using the Add Shortcut button, the Remove Shortcut button has no effect		
	Shortcut Remove Shortcut	Receptionist Console shortcut on your desktop. Click this button to remove the previously created Receptionist Console shortcut. If you did not create a shortcut using the Add Shortcut button, the Remove Shortcut button has no effect.		
Activity Archive	Shortcut         Remove         Shortcut	Receptionist Console shortcut on your desktop. Click this button to remove the previously created Receptionist Console shortcut. If you did not create a shortcut using the Add Shortcut button, the Remove Shortcut button has no effect.		
Activity Archive	Shortcut         Remove         Shortcut         The Activity Acall event state	Receptionist Console shortcut on your desktop. Click this button to remove the previously created Receptionist Console shortcut. If you did not create a shortcut using the Add Shortcut button, the Remove Shortcut button has no effect. Archive plug-in allows you to store istes content locally on your		
Activity Archive	Shortcut         Remove         Shortcut         The Activity Acall event stat         computer whee	Receptionist Console shortcut on your desktop. Click this button to remove the previously created Receptionist Console shortcut. If you did not create a shortcut using the Add Shortcut button, the Remove Shortcut button has no effect. Archive plug-in allows you to store istcs content locally on your ere the log is stored.		
Activity Archive	Shortcut         Remove Shortcut         The Activity A call event stat computer whee         The basic	Receptionist Console shortcut on your desktop. Click this button to remove the previously created Receptionist Console shortcut. If you did not create a shortcut using the Add Shortcut button, the Remove Shortcut button has no effect. Archive plug-in allows you to store istes content locally on your ere the log is stored.		
Activity Archive	Shortcut         Remove         Shortcut         The Activity A         call event stat         computer whe         The log is sav	Receptionist Console shortcut on your desktop. Click this button to remove the previously created Receptionist Console shortcut. If you did not create a shortcut using the Add Shortcut button, the Remove Shortcut button has no effect. Archive plug-in allows you to store istes content locally on your ere the log is stored. ed at a time interval (daily, weekly,		
Activity Archive	Shortcut         Remove         Shortcut         The Activity A         call event stat         computer whe         The log is sav         monthly) that	Receptionist Console shortcut on your desktop. Click this button to remove the previously created Receptionist Console shortcut. If you did not create a shortcut using the Add Shortcut button, the Remove Shortcut button has no effect. Archive plug-in allows you to store istcs content locally on your ere the log is stored. ed at a time interval (daily, weekly, you select as a comma-separated		



Diagram

#### **Settings - About**

Introduction	The About tab displays the following information about Receptionist Console:

- software version
- client profile used
- copyright information

	Figure 42.	About tab
CO	Business* VoiceManager Receptionist	
General	Application Services	Plug-ins About
About		
Version		COX Business' VoiceManager Receptionist
		BroadWorks <sup>®</sup> Receptionist <sup>™</sup> R19.0.38
Profile		Cox-Branded-Receptionist-12-15-14-update
Disclaimer		Warning: This computer program is protected by the copyright law and international tr BroadWorks <sup>®</sup> and BroadWorks <sup>®</sup> Receptionist <sup>TM</sup> are trademarks BroadSoft <sup>®</sup> Inc.



#### Title Bar

Help	
Introduction	Receptionist Console provides online access to a portable document format (PDF) version of this guide.
	Click the <b>Help</b> link in the upper right corner to open the User Guide.
	Figure 43. Help link
	Settings Help Full Screen Sign Out
-	
Full Screen	
Introduction	Removes toolbars at the top of the screen to display a larger view of the interface.
	Figure 44. Full Screen link
	Settings   Help Full Screen Sign Out
Sign Out	
Introduction	To exit Receptionist Console, click the <b>Sign Out</b> link at the upper right corner of the main interface.
	Figure 45. Sign Out link
	Settings   Help   Full Screen Sign Out



#### **Administrator Functions**

Introduction	This section discusses functions that your MyAccount administrator performs.
	We will begin by reviewing how the administrator can change the name of a
	call center or Queue.

#### **Change the Call Center Name**

Call Center Name Change From the Call Center Management window, you can change the name of the queue(s) and reset or change the password required by the Receptionsit Console user to login to the queue(s).

Figure 46.	Call Center	Management	<u>window</u>
-			

Jse this screen to change the account from the dropdown on	name or p the right	assword of a call center. If	you have access to more than one account, first select ar
		Selected Account:	
		Test - IP Centrex 2.0.3 Main Office 238-311472613	APT SUEB1 9 JAMES P MURPHY IND HWY WEST WARWICK, RI 02893
Call Center Name 👙	Cal	I Center TN	Action
4016158373	401	-615-8373	Change Name Set Password

Figure 47. New Call Center Name

Change Call Center Name	3	۲
Enter the new Call Center name in the	space below. Click Save and Return when you are done.	
New Call Center Name	Main Call Center - NE Reg	
	Cancel Save and Return	

Use the following steps to modify the name of a call center.

How to Change the Name of a Call Center

Step	Action
1.	Log into MyAccount and click the MyAccount menu.
2.	Click the Applications tab and select the Call Center Name and
	Password link.
3.	Click the <b>Edit</b> button to the right of the call center you want to
	modify.
	<b>Result</b> : The <b>Change Call Center Name</b> dialog box displays.
4.	Click the <b>Change Name</b> button.
5.	Enter the New Call Center Name.
6.	Click the Save and Return button.



#### **Change the Call Center Queue Password**

Introduction	Use the following steps to change or reset the password that users must enter to access the Receptionist Console. <b>Note</b> : If the password is updated, all Receptionist Console users that access the queue need to change the queue password in their application.			
Call Center Password Change	From the Ca queue(s) and <b>Figure 1.</b>	Il Center Managem I reset or change the <u>Change Call Cent</u> Set Call Center Password	ent window, you can change password. Erer Password	e the name of the
		Set the password agents will use to ente * Must be at least 8 characters in length. * Must consist of at least one alpha, num * New Call Center Password * Confirm New Call Center Password	r the call center. The following rules apply for the password: eric, and special character (ex.1@#\$%*).	

**How to Change** Use the following steps to modify the name of a call center.

the Call Center Password

Step	Action
1.	Log into <b>MyAccount</b> and click the <b>MyAccount</b> menu.
2.	Click the Applications tab and select the <b>Call Center Name and</b>
	Password link.
3.	Click the <b>Edit</b> button to the right of the call center you want to
	modify.
	Result: The Change Call Center Name dialogue box displays.
4.	Click the Change Password button. See Figure 1.
5.	Enter the New Call Center Password in the text field.
6.	Re-enter the password in the Confirm New Center Password
	text field.
7.	Click the <b>Save and Return</b> button.



#### Manage Call Center Users

Introduction	The Recep are associ	ptionist Console application allows you to add and remove users that ated to a particular call center.
How to Manage Call Center	Use the fo	llowing steps to manage call center agents.
Agents	Step	Action
	1.	Log into <b>MyAccount</b> and click the <b>MyAccount</b> menu.
	2.	Click the <b>Applications</b> tab.
	3.	Click the <b>Call Center</b> link.
	4.	Click the <b>Edit</b> link to the right of the call center to which you
		want to assign or remove users.
		Figure 48. <u>Call Center List - Edit</u>
		Applications Call Center Call Center Call Center service allows high-volume, incoming calls to be automatically routed from a central phone number to a rollover order set by the administrator. You can edit settings for a Call Center or user, as well as specify what callers hear while they wait. You may also determine what happens to call overflow and edit the incoming Calling Plan for a Call Center.
		Call Center List
		Listing 1 Call Centers
		On <ul> <li>Description</li> <li>Phone Number</li> <li>Ext.</li> <li>Account Number</li> <li>Manage</li> <li>4016158373</li> <li>401-615-8373</li> <li>8373</li> <li>Edit</li> </ul>
		A Hide Call Center List
		Call Center Users Show Call Center Users
		Personal Call Center Settings
		Show Personal Call Center Settings
		Cancel
	5.	From the Call Center Users section, go to the Available Users
		panel. (Note: Users are available if they have been assigned the
		Call Center feature.)



6.	From the list of <b>Available Users</b> , select the person(s) you want to assign to a call center or remove from a call center and click the <b>Add</b> or <b>Remove</b> button, respectively. a. To add the entire group of available users, click the <b>Move</b>
	All button. To move the assigned users back to the <b>Available Users</b> panel, click the <b>Remove All</b> button.
	b. You may sort assigned users when you click the up or down arrow buttons.
	Figure 49. Available / Assign Users to a Call Center
	Call Center Users Search: Last Name   Enter Two or More Characters to Search Find Clear Search & Filters  Filter by: Account (All) Available Users Assigned Users
	Add > Add A
	Hide Call Center Users
7.	Click the <b>Save and Return</b> button.



#### **Configuring Messaging and Music**

Introduction	Businesses may elect to play music for incoming callers before their call is answered or play messages to provide incoming callers with important information about their company and to ensure the customer that their call has not been forgotten.				
	This function is designed to keep your callers engaged during their wait time. You may elect to use the default messaging that Cox provides or create up to four files for the Entrance, Comfort, and Overflow messages described below.				
	The announcements are linked so that your caller hears different content as they are waiting in the queue. In addition, the messages and music do not resume from a mid-point from one caller to the next, but play from the beginning at the time the call is placed on hold.				
	If you select the default settings, callers may hear the following scripts:				
	<b>Entrance Message</b> – "Your call is very important to us. Please wait for next available agent".				
	<b>Estimate Wait Message</b> (this is a system-recorded greeting and is configurable by a Cox administrator only) – " <i>You are caller number</i> $\langle x \rangle$ <i>in queue. Please hold</i> ".				
	<b>Comfort Message</b> – "Your call is very important to us. Please wait for the next available agent".				
	<b>Overflow Message</b> – "Your call is very important to us, however, due to the high volume of calls, we cannot answer your call. Please hold while we transfer you to voice messaging so that we can help you as soon as possible".				
	The following sections instruct you on how to set up and activate each type of message.				



#### Activate Entrance Messages

Introduction	Entrance i by an oper	messages provide information to callers before their call is answered rator.
How to Activate an	Use the fo	ollowing steps to configure and activate an entrance message.
Entrance	Step	Action
Message	1.	Log into VoiceManager MyAccount and click the
		VoiceManager MyAccount menu.
	2.	Click the <b>Applications</b> tab.
	3.	Click the <b>Call Center</b> link.
	4.	Click the <b>Edit</b> link to the right of the call center for which you
		want to add messages.
	5.	Scroll to the <b>Announcements</b> section and click the <b>Show</b>
		Announcements link.
		<b>Result</b> : All of the <b>Announcement</b> options display.
	6.	Select the Play Entrance Message Yes / No radio button to
		activate or deactivate, respectively, a message that callers hear
		when they call the center.
		Figure 50 Announcement window – Entrance
		Message
		Announcements
		Play Entrance Message: © Yes O No 🚱
		Require Message Completion: O Yes 💿 No 😧
		Message Type: O System Default @ Custom: 1 Add @
		4 Add @
	7.	Select the <b>Require Message Completion Yes / No radio button</b>
		to define whether callers will hear the entire initial audio
		greeting.
	8.	From the <b>Message Type</b> section, select the radio button to allow
		callers to hear the System Default message or a Custom
		message. (Note: If you click the Custom radio button, click the
		Add link to select the audio file.)
		Result: A Select Announcements dialog box displays. See
		Figure 53.
	9.	Click the <b>Browse</b> button to locate the audio file you want to use
		and check the "I have read and understand the disclaimer" to
		confirm that you have rights to use the file.





	Figure 51. Disclaimer dialog
	Select Announcements       ×         Browse for the audio you want to use for your Call Center announcements. The file must meet certain size and format standards and will be uploaded when you select the "Upload" button below.         ★ = Required         ★         Browse
	Disclaimer Because you'll be using Cox's VoiceManager custom media service to upload your own content, we wanted to remind you of your responsibility set forth in the Terms of Service (available at http://ww2.cox.com/aboutus/policies/business-
	Cancel Upload
10.	Click the <b>Upload</b> button. <b>Result</b> : The file appears in the <b>Custom</b> list.
11.	Click the Save and Return button.



#### Activate Estimated Wait Messages

Introduction	The Estim the amoun them an an call is in th	ated Wait Message type provides your caller with information about it of time it may take before their call is answered. You may give mount of time they can expect to wait <i>or</i> inform them of where their he queue.
How to Activate an Entrance	Use the fo wait queue	llowing steps to configure and activate an estimated wait time or e message.
Message	Step	Action
	1.	Log into VoiceManager MyAccount and click the
		VoiceManager MyAccount menu.
	2.	Click the <b>Applications</b> tab.
	3.	Click the <b>Call Center</b> link.
	4.	Click the <b>Edit</b> link to the right of the call center for which you
		want to add messages.
	5.	Scroll to the <b>Announcements</b> section and click the <b>Show</b>
		Announcements link.
		<b>Result</b> : All of the <b>Announcement</b> options display.
	6.	Scroll to the Play Estimated Wait Message section and select
		the Yes or No radio buttons to define whether you want callers
		to hear a wait message.



7.	From the <b>Message Type</b> drop-down menu, select the <b>Estimate</b> <b>Wait Time</b> option if you want callers to hear how long they have to wait before their call is addressed.
	Figure 52. Estimated Wait (Time) Message
	Play Estimated Wait Message: © Yes C No 🚱
	Message Type: Estimated Wait Time v For Callers With a Wait Time of * 5 Minutes or Lower @
	Play High Call Volume Message for Other Callers
	* Default Handling Time: 5 Minutes Per Call
	OR
	Select the Queue Position option to announce the callers' position in the wait line.
	Figure 53. Estimated Wait (Queue) Message
	Play Estimated Wait Message: © Yes C No 🚱
	Message Type: Queue Position For Callers In Queue Position * 5 or Lower 3
	Play High Call Volume Message for Other Callers
	* Default Handling Time: 5 Minutes Per Call
8	For either Message Type enter a number in the For Callers
0.	With a Wait Time of <x> Minutes or Lower or For Callers in</x>
	Queue Position <x> or Lower text field. The digit you enter</x>
	defines the trigger value for either the <i>amount of time</i> callers can
	expect to wait before their call is answered or the number of calls
	ahead of them. In Figures $\frac{8-6}{2}$ and $\frac{9}{2}$ , callers with a wait time of
	mossage: and callers with five calls should of them will hear the
	Oueue Position message
9.	Check the <b>Play High Volume Message for Other Callers</b>
	checkbox to initiate a message to callers who have an extended
	wait time or number of calls ahead of them.
10.	In the <b>Default handling time</b> text field, enter the estimated
	handling time per call, in minutes, to use when calculating the
	wait time.
11.	Click the Save and Return button.



#### **Activate Comfort Messages**

# **Introduction** You may configure comfort messages to play while callers are waiting for their call to be answered. You can create and upload a maximum of four files for different queue announcement functions. All four announcements are linked and play in sequence.



**Note**: The maximum file size per message is 5Mb. The file must be in the correct format and adhere to other guidelines to play successfully. Refer to the guidelines on page 74.

Each of the announcement functions is separate. This is good to know for anyone who is recording custom messaging, such as if a voice over ad is playing on hold, the comfort messaging starts at the designated interval(s) that is established in the comfort messaging screen.

We recommend that you plan to allow the person doing the recording to create timed messaging on hold so that your commercial messaging is not interrupted by comfort messages.

Use the following steps to create and activate a comfort message.

How to Create a Comfort Message

Step	Action
1.	Log into VoiceManager MyAccount and click the
	VoiceManager MyAccount menu.
2.	Click the <b>Applications</b> tab.
3.	Click the <b>Call Center</b> link.
4.	Click the <b>Edit</b> link to the right of the call center for which you
	want to add messages.
5.	Scroll to the Announcements section and click the Show
	Announcements link.
	<b>Result</b> : All of the <b>Announcement</b> options display.


(	
0.	Select the riay Comfort Message Yes / No radio button to
	while they are waiting to be answered
	while they are waiting to be answered.
	Figure 54. Comfort Message
	Play Comfort Message: © Yes C No 🕑
	* Delay Between Messages: 15 Seconds
	Message Type: © System Default © Custom: 1 CKbond_theme - cci.w
	2 3
	4
7.	In the <b>Delay Between Message</b> < <b>x</b> > <b>Seconds</b> text field, enter the
	time that will elapse before the comfort message plays again.
8.	From the <b>Message Type</b> section, select the radio button to allow
	callers to hear the <b>System Default</b> message or a <b>Custom</b>
	message. (Note: If you click the Custom radio button, click the
	Add link to select the audio file.)
	Result: A Select Announcements dialog box displays.
9.	Click the <b>Browse</b> button to locate the audio file you want to use
	and check the "I have read and understand the disclaimer" to
	confirm that you have rights to use the file. See Figure $75$ .
10.	Click the <b>Upload</b> button.
	<b>Result</b> : The file appears in the <b>Custom</b> list.
11.	Click the <b>Save and Return</b> button.



### Activate Music in Queue

**Introduction** You may configure and customize up to four music files to play sequentially while callers are waiting in the queue. You can also specify a message to be played to internal callers.

How to CreateUse the following steps to configure and activate music or messages to playMusic in Queuefor calls in a queue.

Step		Action	
1.	Log into VoiceMa	nager MyAccount and click the	
	VoiceManager M	yAccount menu.	
2.	Click the Applicat	ions tab.	
3.	Click the Call Cen	ter link.	
4.	Click the Edit link	to the right of the call center for w	hich you
	want to add message	ges.	
5.	Scroll to the Anno	uncements section and click the S	how
	Announcements li	ink.	
	Result: All of the A	Announcement options display.	
6.	6. Select the <b>Music in Queue Yes / No radio button</b> to activ		
	deactivate, respecti	ively, music that callers hear while	they are
	waiting to be answ	ered.	
	Figu	ire 55. <u>Music in Queue</u>	
	Music In Queue:		
	Music Type:	C System Default . Custom: 1 CKbond theme-cciw	Remove Change 2
		2	Add 😮
		4	Add 🕑
	Internal Calls:	✓ Use Alternate Source for Internal Calls	
	music Type:	C System Default C Custom: 1 Candibond_theme - cc 2	Remove Change 😢 Add 😧
		3 4	Add 😮 Add 😮
	Hide Announcements		
7.	From the Music T	ype section, select the radio button	to allow
	callers to hear the	System Default music or a Custon	<b>n</b> music
	choice. (Note: If ye	ou click the <b>Custom</b> radio button, o	click the
	Add link to select	the music file.)	
	Result: A Select A	nnouncements dialog box display	/S.
8.	Select the <b>System</b>	<b>Default</b> radio button to use packag	ed music or
	select the <b>Custom</b>	radio button to use personalized co	ontent.
	Note: If you select	Custom, click the Browse button	to locate
	and upload the file	(s).	



9.	Click the <b>Browse</b> button to locate the audio file you want to use
	and check the "I have read and understand the disclaimer" to
	confirm that you have rights to use the file. See Figure 5.
10.	Click the <b>Upload</b> button.
	<b>Result</b> : The file appears in the <b>Custom</b> list
11.	Check the Use Alternate Source for Internal Calls box to play
	a unique music file for employees' calls only.
12.	Repeat steps 7-9 to configure the type of music you want internal
	callers to hear.
13.	Click the <b>Save and Return</b> button.



### **Activate Overflow Messages**

### Introduction Configure the call center routing policy when a large number of calls have been received or calls have been waiting longer than the configured threshold. Upload a recording of your name so that when a caller is connected to your extension by the Auto Attendant or to Voice Messaging, your name is announced to the caller. Your personalized name can also be recorded or deleted using your telephone through the voice portal. How to Use the following steps to configure the Overflow function. Configure Overflow Step Action Messaging 1. Log into VoiceManager MyAccount and click the VoiceManager MyAccount menu. Click the Applications tab. 2. Click the Call Center link. 3. Click the **Edit** link to the right of the call center for which you 4. want to add messages. 5. Scroll to the **Announcements** section and click the **Show** Announcements link. **Result**: All of the **Announcement** options display. 6. From the **Overflow Action** drop-down menu, select how you want calls handled that meet the **Enable overflow after** <**x**> seconds allotment. The choices are Play Busy Tone, Transfer Call to, and Ring Until Caller Hangs Up. (Note: Based on your selection, you may have to enter additional information. For example, if you select **Transfer Call To:**, you must enter the

phone number to which the call will be transferred.)



7.	Select the <b>Play</b> A whether you wan configured for ov	Announcement Yes to your callers to he verflow calls.	<b>s / No radio butto</b> ar a message you	on to define have
	Fi	gure 56. <u>Overfl</u> window	ow Message confi	iguration_
	Overflow			
	Overflow Action:	Play Busy Tone	Y	
		Enable overflow after 36	0 seconds 🕜	
	Play Announcement:	⊙ Yes ⊂ No		
	Message Type:	C System Default 🤄 Cus	tom: 1 Candibond_theme - cc 2 CKbond_theme - cci.w 3	Remove Change 🕑 Remove Change 🕑 Add 🚱
	Alde Overflow		4	Add 🚱
8.	From the Messag callers to hear the message choice. click the Add lin Result: A Select	ge Type section, se e System Default r (Note: If you click k to select the mess Announcements of	lect the radio butt nessage or a <b>Cust</b> the <b>Custom</b> radio sage file.) dialog box display	on to allow com button, 78.
9.	Click the <b>Brows</b> and check the " <b>I</b> confirm that you	e button to locate th have read and un have rights to use t	ne audio file you v <b>derstand the disc</b> the file. See Figure	vant to use claimer" to e 7 <u>5</u> .
10.	Click the Upload	button.	<u> </u>	
	Result: The file a	appears in the Cust	t <b>om</b> list.	
11.	Click the Save a	nd Return button.		



### **Record a Personal Greeting or Announcement**

# **Introduction** Use this procedure to record a personal greeting or an announcement using a PC. The application server accepts a .WAV file format. The following lists the validation rules for the file formats:

- CCITT, u-law, or a-law codec
- 8.000 kHz
- 8 bit mono
- .WAV file type
- For .WMA files:
- CCITT, u-law, or a-law codec
- 8.000 kHz
- 8 bit mono
- .WMA file type

### Helpful Recording Guidelines

# Introduction Review the following helpful recording guidelines before you record your greeting or announcement. The maximum audio length is two (2) minutes for a Voice Messaging Greeting and Custom Ringback User/Group. The maximum audio length is 10 seconds for the user's Voice Portal Personalized Name. The maximum audio length is 10 minutes for the Music On Hold greeting. For all other services, the maximum audio length is 5 minutes.

Follow these procedures to record a .WAV file. Instructions are provided for the following sound recorders:

- Windows XP Sound Recorder and Windows 98 Sound Recorder
- Windows 2000 Sound Recorder
- Windows NT Sound Recorder
- Windows 7



### **Record Using Windows XP or Windows 98 Sound Recorder**

# IntroductionIn Windows 98, select Start>Programs>Accessories>Multimedia>Sound<br/>Recorder from the Windows task bar.

### In Windows XP, select **Start>All Programs>Accessories>Entertainment>Sound Recorder**.



**Note**: Your Sound Recorder may be located in a different file, or your default sound recorder is another product. Please note the required format for your greetings below and follow the instructions for your specific sound recording product.

### How to Record a Message on Windows XP or Windows 98

Use the following steps to record a message on the Windows XP or Windows 98 operating system.

Step	Action
1.	From the <b>File</b> menu, click <b>Properties</b> . The <b>Properties for</b>
	Sound window displays.
2.	Click Convert Now and then click OK. The Sound Selection
	window appears.
3.	Select CCITT u-Law from the Format list.
4.	Under the Attributes section, select 8.000 kHz, 8 bit Mono and
	click <b>OK</b> . <b>Tip</b> : You may want to save this format at this point so
	that you can select it easily in the future.
5.	In the <b>Properties for Sound</b> dialog box, click <b>OK</b> .
6.	Click <b>Record</b> on the Sound Recorder. Speak clearly into your PC
	microphone and record your message. When you have finished,
	click <b>Stop</b> . To listen to your message, click <b>Play</b> . If you want to
	re-record your message, repeat this step.
7.	When you are satisfied with your message, select Save As from
	the <b>File</b> menu and name it with a .WAV extension.
8.	Enter the name of your recording and click <b>OK</b> . To exit without
	saving, click <b>Cancel</b> .



### **Record Using Windows 7**

How to Record a Message on Windows 7 Use the following steps to record a message on the Windows 7 operating system.

Step		Action			
1.	Go to Sta	rt>All Programs>Sound Recorder.			
2.	Right-clic	ck on Sound Recorder and select Properties.			
3.	Enter sou	ndrecorder /file outputfile.wav in the Target field.			
	(Tip: Cop	py the original filename listed in the Target field and			
	save it on	your computer in case you want to use the original			
	setting.)				
4.	From you	Ir All Programs menu, select Sound Recorder and			
	right-clic	k on <b>Properties</b> . The <b>Sound Recorder Properties</b>			
	window c	lisplays.			
5.	In the Tar	rget field, paste the filename you copied; e.g.,			
	C:\Wind	ows\system32\SoundRecorder.exe /file			
	outputfil	e.wav.			
6.	Click the Apply button. An Access Denied message displays				
	stating th	at you will need to provide administrator permission to			
	change th	ese settings. Click <b>Continue</b> to complete the operation.			
	Click the	OK button.			
7.	Return to	the Sound Recorder menu item and select it.			
8.	Click the <b>Start Recording</b> button.				
9.	Record your message and click the <b>Stop Recording</b> button.				
10	Enter the	File name in the Save As window.			
11.	If you wa	int to use Sound Recorder to record direct sound online:			
	Step	Action			
	1.	Set your PC to <b>Stereo Mix</b> .			
	2.	Right-click the speaker icon near the clock in the			
		lower right corner of your screen and select			
		Recording Devices.			
	3.	Select Stereo Mix As Default.			



# Appendix A: Steps for Using Plug-Ins

The Call Center Console client requires your computer to have Java JRE 1.6 or higher installed before you proceed with the steps in this section.



**Important:** If error messages appear while downloading the JNLP file (steps 1-10 below), log out and log back in.

- 1. Load the Receptionist Console thin client.
- 2. Click the **Settings** link in the upper right corner of the screen. **Result**: The Call Center dashboard appears.
  - Figure 1. Settings link



### Figure 2. Plug-Ins tab

General	Application	Services	Plug-ins	Messaging	Report	About
ug-ins						
Plug-ins		Disable All Plug-ins				
Notification			Focus win	dow for incoming o	alls	
			Show notif	ications for calls	when auto answ	er is off 🐱
Microsoft <sup>®</sup> Outlook <sup>®</sup>			Disable Out	ook Integration		
			Retrieve o	ontacts from : De	fault Contact Fol	der 💌
			Use Ou	tlook contacts as	preferred CLID lo	okup
Program S	Shortcuts		Add Shor	tcut Remove	Shortcut	
Activity Ar	rchive		Disable Call	Event Log Integra	tion	
			Rotate Lo	g : weekly	~ (	open log location

- 3. Click the **Plug-ins** tab.
- 4. Make sure the **Disable All Plug-ins** checkbox is unchecked. **Result**: All Plug-Ins are enabled.
- 5. Click the **Sign Out** link in the upper right corner of the screen to save the changes. **Result**: A **Do you want to save your workspace?** dialog box appears.
- 6. Click the **Yes** button.



- Log back in to Receptionist Console.
   Result: A message appears that a file is ready to be downloaded.
- 8. Depending on your browser type, you may be prompted to "run," "allow," or "approve" security checks and the JNLP file.

In addition, messages about downloading and verifying the application contained in the file appear, followed by a dialog box asking you whether you want to run the application. At the bottom of the screen, a message appears, "**Do you want to open or save the JNLP file?**"

9. Click the **Open** button (in Internet Explorer) or a similar option if you are using one of the other approved browser types.

**Result**: Based on your browser, such as IE, you may receive a Security message. If you do, click the **Allow** button. If presented with a similar dialog box in other browsers, click the appropriate button or link.

```
Figure 3. Open or Save .JNLP file message (as presented in Internet Explorer)
```

Cancel

Do you want to open or save <b>BWCallCer</b>	ter.jnlp (1.31 KB) from rconsole.stg.p6.coxlab.net?	Open Sav	ve ▼ Cancel ×
Figure 4.	Downloading and Verifying	Application pop-up wind	<u>ows</u>
	Starting application	<b>*</b> ×	
	Downloading application.		
	Location: https://10.99.15.73:443		
		Cancel	
	Starting application	13	
	Verifying application.		
	Location: https://10.99.15.73:443		







10. Click the **Run** button. This starts the Java HTTPS server allowing Call Center to access the desktop integration features. (**Note:** Desktop integration features will not be available if you click the **Cancel** button.)



11. See the next section for instructions on how to install browser certificates.



# **Certificate for Desktop Integration Features**

You need to add the desktop plug-in certificate to the browser-specific certificate store location on your machine, which is required to run Call Center desktop integration features. The table below is comprised of browser types and the location of each browser's certificate trust store location.

Browser	Windows	Mac OS
Chrome	Windows Certificate Store	System Keychain
Internet Explorer	Windows Certificate Store	Not Applicable
Safari	Not Applicable	System Keychain
Firefox	Firefox Certificate Store	Firefox Certificate Store

The following sub-sections provide instructions for adding the certificate on different platforms.

### **Download Desktop Plug-ins Certificate**

The desktop plug-ins certificate can be downloaded with the following HTTP call to the Call Center client context:

https://console.coxbusiness.com/receptionistconsole/certificate/desktopplugin.cer

**Tip:** Save the desktopplugin.cer file in an easily accessible location.



# Add Certificate to Microsoft Windows Certificate Store

Follow these steps to add the desktop plug-in certificate to the Windows certificate store.

### **Using Internet Explorer**

The following instructions apply to Internet Explorer browser (version 11.0 only) running on a Windows operating system (OS).

**Result**: The **Internet Options** dialog box appears.



1. From the Internet Explorer Menu bar, select Tools, and then Internet Options.

2. Click the **Content** tab, and then the **Certificates** button. Results: The Certificates dialog box appears.

82



Intended purpose:	<al>&gt;</al>	
	Carme	
Intermediate Certifi	cation Authorities	Trusted Root Certification Authorities

### Figure 7. MS Windows – Certificates

Issued To	Issued By	Expiratio	Friendly Name	1
AddTrust External	AddTrust External CA	30/05/2020	The USERTrust	E
Baltimore CyberTru	Baltimore CyberTrust	12/05/2025	Baltimore Cyber	
Certum CA	Certum CA	11/06/2027	Certum	
Class 2 Primary CA	Class 2 Primary CA	06/07/2019	CertPlus Class 2	
Class 3 Public Prima	Class 3 Public Primary	01/08/2028	VeriSign Class 3	
COMODO RSA Cert	COMODO RSA Certific	18/01/2038	COMODO SECU	
Copyright (c) 1997	Copyright (c) 1997 Mi	30/12/1999	Microsoft Timest	
DigiCert Assured ID	DigiCert Assured ID R	09/11/2031	DigiCert	
DigiCert Global Roo	DigiCert Global Root CA	09/11/2031	DigiCert	2
import Export ertificate intended purpos erver Authentication, Clier amping, Encrypting File Spier	Remove es It Authentication, Secure Bi stem, IP security tunnel te	mail, Code Sigr rmination, IP s	Adva ing, Time ecurity View	nce

3. Click the Trusted Root Certification Authorities tab, and then click the Import button.

Result: The Certificate Import Wizard dialog appears.

Figure 8. Certificate Import Wizard



4. Click the **Next** button.



- 5. Click the **Browser** button, and then choose **Desktop plugin**.
- 6. Follow the prompts on the wizard to install the certificate.
- 7. Click the **Security** tab.
- 8. Click **Trusted sites**, and then click the **Sites** button. **Result**: The **Trusted Sites** dialog box appears.

### Figure 9. Internet Explorer – Internet Options – Security





$\checkmark$	You can add a this zone will u	ind remove web use the zone's s	osites from this zo ecurity settings.	one. All websit
Add this	website to the	zone:		
				Add
Website	s:			
https:	//10.99.15.73			Remove
		C 12 / 11 /		

Figure 10. Internet Explorer – Trusted Sites

In the Add this website to the zone text field, enter the Call Center client URL, and then click the Add button.
 Begult: The UBL engages in the Websites text here.

Result: The URL appears in the Websites text box.

- 10. Click the **Close** button.
- Open the Internet Options dialog box from your desktop, then click Custom level.
   Result: The Security Settings Trusted Sites Zone dialog box appears.
  - Figure 11. Internet Explorer Security Settings Trusted Sites Zone

Settings          Miscellaneous         Access data sources across domains         Disable         Prompt         Allow dragging of content between domains into separate wi         Disable         Enable         Allow dragging of content between domains into separate wi         Disable         Enable         Allow dragging of content between domains into the same wi         Disable         Enable         Allow META REFRESH         Disable         Enable         Allow scripting of Microsoft web browser control         Pricable         *Takes effect after you restart your computer         Reset custom settings         Reset to:         Medium (default)         Reset	Security Settings - Trusted Sites Zone
Miscellaneous Access data sources across domains Disable Finable Prompt Allow dragging of content between domains into separate wi Disable Enable Allow dragging of content between domains into the same wi Disable Enable Allow META REFRESH Disable Enable Allow scripting of Microsoft web browser control Timesha *Takes effect after you restart your computer Reset custom settings Reset to: Medium (default) Reset	Settings
Access data sources across domains     Disable     Prompt     Allow dragging of content between domains into separate wi     Disable     Enable     Allow dragging of content between domains into the same wi     Disable     Enable     Allow META REFRESH     Disable     Enable     Allow scripting of Microsoft web browser control     Disable     Time  *Takes effect after you restart your computer  Reset custom settings Reset to: Medium (default)     Reset	Miscellaneous
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Oisable Enable Allow dragging of content between domains into the same wi Disable Enable Allow META REFRESH Disable Enable Allow scripting of Microsoft web browser control Image: State of the state	Allow dragging of content between domains into separate wi
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Oisable Enable Allow META REFRESH Disable Enable Allow scripting of Microsoft web browser control Picable *Takes effect after you restart your computer Reset custom settings Reset to: Medium (default) Reset	Allow dragging of content between domains into the same wi
Enable Allow META REFRESH Disable Enable Allow scripting of Microsoft web browser control Pricable *Takes effect after you restart your computer Reset custom settings Reset to: Medium (default) Reset	<ul> <li>Disable</li> </ul>
Allow META REFRESH  Disable  Allow scripting of Microsoft web browser control  Allow scripting of Microsoft web browser control  Tricable  *Takes effect after you restart your computer  Reset custom settings Reset to: Medium (default)  Reset	Enable
Disable Enable Allow scripting of Microsoft web browser control Picable *Takes effect after you restart your computer Reset custom settings Reset to: Medium (default) Reset	Allow META REFRESH
Enable     Allow scripting of Microsoft web browser control     Discable     Takes effect after you restart your computer     Reset custom settings     Reset to:     Medium (default)     Reset	Disable
Allow scripting of Microsoft web browser control	Enable
	Allow scripting of Microsoft web browser control
*Takes effect after you restart your computer Reset custom settings Reset to: Medium (default) Reset	Dirabla
*Takes effect after you restart your computer Reset custom settings Reset to: Medium (default)  Reset	4
Reset custom settings Reset to: Medium (default)   Reset	*Takes effect after you restart your computer
Reset to: Medium (default)   Reset	Reset custom settings
	Reset to: Medium (default)   Reset
OK Cancel	OK Cancel



- 12. Scroll down to the **Miscellaneous** > **Access data sources across domains** menu option and click the **Enable** radio button.
- 13. Click the **Yes** button in the Warning! dialog box that appears.
- 14. Click the **OK** button, and then click the **OK** button in the Internet Options window to close the window.

### **Using Google Chrome**

The following instructions apply to a Chrome browser (version 57 and lower) running on a Windows operating system (OS).

- 1. Open the Chrome browser.
- 2. In the top right corner of the browser window, click the Chrome menu icon ( $\equiv$ ).
- 3. Click the **Settings** link. **Result**: The **Settings** tab appears.
- 4. At the bottom of the dialog box, click the **Show advanced settings** checkbox, and then scroll down to the **HTTPS/SSL** section.

```
Figure 12. Chrome – Advanced Settings
```

Settings		x
← → C	🗅 chrome://settings 🖒	≡
Chrome	Settings here to save each file before downloading	*
History	HTTPS/SSI	
Extensions	Manage certificates	
Settings		
	Google Cloud Print	
About	Set up or manage printers in Google Cloud Print. <u>Learn more</u> Manage	
	Show notifications when new printers are detected on the network	-
•		•

Click the Manage certificates button.
 Result: The Certificates dialog box appears.



Issued To	Issued By	Expiratio	Friendly Name	ć
🛱 AddTrust External	AddTrust External CA	30/05/2020	The USERTrust	ŀ
🔄 Baltimore CyberTru	Baltimore CyberTrust	12/05/2025	Baltimore Cyber	
🔄 Certum CA	Certum CA	11/06/2027	Certum	
🔄 Class 2 Primary CA	Class 2 Primary CA	06/07/2019	CertPlus Class 2	
🔄 Class 3 Public Prima	Class 3 Public Primary	01/08/2028	VeriSign Class 3	
COMODO RSA Cert	COMODO RSA Certific	18/01/2038	COMODO SECU	
🔄 Copyright (c) 1997	Copyright (c) 1997 Mi	30/12/1999	Microsoft Timest	
DigiCert Assured ID	DigiCert Assured ID R	09/11/2031	DigiCert	
🔄 DigiCert Global Roo	DigiCert Global Root CA	09/11/2031	DigiCert	•
Import Export Certificate intended purpose Server Authentication, Clien	Remove s t Authentication, Secure Er	nail, Code Sign	Advar	nce

Figure 13. MS Windows – Certificates

6. Click the Trusted Root Certification Authorities tab, and then click the Import button.

Result: The Certificate Import Wizard dialog box appears.

Figure 14. Certificate Import Wizard



7. Follow the prompts to install the certificate.



# Add Certificate to Firefox Certificate Store

Mozilla Firefox has its own certificate store. Follow these steps to add the certificate to the Firefox Certificate store.

The following instructions apply to a Firefox browser (version 54) running on a Windows or Mac operating system (OS).

**Important:** See the Changes for Firefox version 54 section for important information about this browser version.

- 1. Open the Firefox browser.
- 2. Open the **Options/Preferences** window:
- 3. On Windows: From the Tools menu, select Options.
- 4. On Mac: From the Firefox menu, select Preferences. Result: The Options/Preferences dialog box appears.

### Figure 15. Firefox – Options



- 5. Click the **Advanced** icon (Advanced), and then click the **Certificates** tab.
- 6. Click the View Certificates button.Result: The Certificate Manager dialog box appears.



You have certificates on file	that identify these servers:		
Certificate Name	Server	Lifetime	Ð
DigiNotar Cyber CA	*	Permanent	1
DigiNotar Cyber CA	*	Permanent	
DigiNotar Root CA	*	Permanent	🖬
DigiNotar Services 1024	*	Permanent	🗅
⊿DigiNotar B.V.			
DigiNotar PKIoverheid	C *	Permanent	
DigiNotar PKIoverheid	C *	Permanent	
View Import	Export Delete	Add Exception	]

Figure 16. Firefox – Certificate Manager

- 7. Click the **Servers** tab.
- 8. Click the **Import** button.
- 9. Select the certificate file on your computer and click the **OK** button to import.
- 10. Click the Add Exception button.Result: The Add Security Exception dialog box appears.

Figure 17. Firefox – Add Security Exception



- 11. In the **Location** textbox, enter **https://127.0.0.1:5555**/ and click the **Get Certificate** button (assuming that "5555" is the default port of the local HTTPS [127.0.0.1] server).
- 12. Click the **Confirm Security Exception** button, and then click the **OK** button in the **Certificate Manager** dialog box.



### **Changes for Firefox version 54**

Firefox version 54 introduced a change in behavior that does not allow the desktop integration to fully load with the certificate that is imported under the Authorities section of the Firefox certificate store. The workaround is to add an entry under the Servers section using the following steps:

- 1. Sign in to the client with Firefox and launch the JNLP.
- 2. Open the Firefox Certificate Manager to the Servers tab, and click the Add Exception button.
- 3. Enter <u>https://127.0.0.1:5555/</u> in the **Location** field.

Mac OS - Finder

- 4. Click the **Get Certificate** button.
- 5. Click the Permanently store this exception checkbox, and click the Confirm Security Exception button.

### Add Certificate to Apple System Keychain

The following instructions apply to Chrome browser (version 57 and lower) running on a Mac. Use the following steps to add the certificate to the system keychain on a Mac computer.

1. In the Dock, open **Finder**.

Figure 18.

		Provide a status
FAVORITES  All My Files  Dropbox  Desktop  mohammed  Applications  Downloads  Downloads  Dournets  Pictures  Music  Movies  MohammedTa  243-Parks an  SHARED  Alena's iMac		Activity Monitor.app Activity Monitor.app Adobe AIRstaller.app Adobe AIRstaller.app Adobe Flasnager.app AlrPort Utility.app AlrPort Utility.app AluminumUpdate.app Audio MIDI Setup.app Boot Camp Assistant.app ColorSync Utility.app ColorSync Utility.app ColorSofte1 Update.app Mac EFI Fl Update.app Mac EFI Fl Update.app
Amanda Smit Andy Kemp's Cams computer dec-1vtnc2s RATIS Mac Pro wiserver All	Croast 6 Titanium.app TomTom HOME.app TopCalculette Pro Utilities Virex 7 VMware Fusion.app Windows Media Player Winlows Media Player Winless Broadband.app	Migration Assistant.app Migration Assistant.app Podcast Capture.app Q Podcast Publisher.app Q QuickTime Player 7.app KalD Utility.app S Stuffit Expander.app Terminal.app Migration Assistant.app Name Keychain Access.app Kind Application Size 17.5 MB Created Friday, 16 December 2011 12:21 PM Modified Monday, 29 October 2012 9:09 AM Last opened Monday, 29 October 2012 9:09 AM Version 5.4

- 2. Select Applications and then Utilities.
- 3. In the list of utilities, double-click **Keychain Access**. **Result**: The **Keychain Access** window appears.



00	Keychain Access	
Click to lock the	System keychain.	
Keychains		
login		
Local Items		
System		
System Roots		
	Name	▲ Kind
	Apple Code Signing Certification Authority	certificate
	📰 Apple Root CA	certificate
	Apple Timestamp Certification Authority	certificate
	Apple Worldwide Developer Relations Certification Authority	certificate
	📰 com.apple.kerberos.kdc	certificate
	com.apple.server.apns.alerts	certificate
	com.apple.server.collabd	certificate
Category	com.apple.server.scm_poller	certificate
All Items	com.apple.server.servermgr_xcode	certificate
Passwords	com.apple.server.xcsbuildd	certificate
Secure Notes	com.apple.servermgrd	certificate
My Certificates	com.apple.servermgrd.apns.calendar	certificate
Kove	com.apple.servermgrd.apns.contact	certificate
Castification	com.apple.servermgrd.apns.mail	certificate
L PITITICATOS		

Figure 19. Mac OS – Keychain Access Window (Fragment)

- 4. In the **Keychain Access** dialog box, scroll to the **Keychains** menu, and click the **System** option.
- 5. From the **Category** menu, click the **Certificates** option.

Figure 20. Mac OS – Keychain Access

<b>Keychain Access</b>	File Edit View Window Help
	New Password Item 第N New Secure Note Item 合第N New Keychain て第N New Certificate Preference
	Import Items企業IExport Items企業E
	Add Keychain Delete Keychain "System Roots"  て第個
	Close #W
	Go There Get Info #I
	Unlock Keychain "System Roots"
	Make Keychain "System Roots" Default

- 6. From the **Keychain Access** toolbar, click the **File** menu, and then click the **Import Items** option.
- 7. Follow the instructions of the browser to import the certificate file. **Result**: The certificate appears in the list of certificates as **127.0.0.1**.



- 8. In the Keychain Access window, double-click the certificate. **Result**: The certificate window appears.
  - Kind DigiCert SHA2 Secure Server CA certificate com.apple.systemdefault certificate com.apple.kerberos.kdc certificate 🔀 BroadSoft JSS Built-in Certificate Authority certificate 49563727-EE7B-459D-A2F7-36BA8D012F41 certificate 127.0.0.1 certificate .corp.broadsoft.com certificate 127.0.0.1 .... 127.0.0.1 Certificate Self-signed root certificate Expires: Wednesday, 27 December 2084 at 12:08:34 PM India Standard Time Le This certificate has not been verified by a third narty Use System Defaults Trust When using this certificate: 🗸 Always Trust ? Never Trust Secure Sockets Layer (SSL) Always Trust 10 Secure Mail (S/MIME) Always Trust 0 Extensible Authentication (EAP) Always Trust IP Security (IPsec) Always Trust 0 iChat Security Always Trust 0 0 Kerberos Client Always Trust Kerberos Server Always Trust 0 0 Code Signing Always Trust Time Stamping Always Trust 0
  - Figure 21. Certificate Window

- 9. In the **Trust** section, select **Always Trust for When using this certificate**.
- 10. Click the X in the upper right corner to close the browser.



# On MAC OS X

In MAC OS X, due to security-related restrictions, the JNLP may not execute if you click on it. If this occurs, perform the following steps:

1. From your Mac, open **System Preferences** and select **Security and Privacy**. **Result: The Security & Privacy** dialog box appears and defaults to the **General** tab.

Figu	re 22. Mac OS X – Security & Privacy
[	Security & Privacy
	General       FileVault       Firewall       Privacy         A login password has been set for this user       Change Password         Require password       immediately ‡ after sleep or screen saver begins
	<ul> <li>Show a message when the screen is locked Set Lock Message</li> <li>Disable automatic login</li> </ul>
	Allow applications downloaded from: Mac App Store Mac App Store and identified developers Anywhere
	Click the lock to prevent further changes.

- 2. Click the lock icon (<sup>11</sup>) to unlock the panel.
- 3. In the **Allow applications downloaded from:** section, click the **Anywhere** radio button.
- 4. Click the red dot (•) in the upper left corner of the window to exit the screen.



# **Appendix B: Call States and Actions**

The following table lists possible call states and actions that can be performed in each state.				
Call State	Display Name	Display Icon	Call Personality	Call Actions
Ringing In (Local)	Incoming Local	<b>&gt;</b>	Click-To-Dial	Answer, End
Ringing In (Remote)	Incoming	-	Terminator	Answer, Conference, End

Remote)	meoning		reminator	End
Ringing Out, Outgoing	Outgoing	<b></b>	Originator	Conference, End
Active	Active		Any	Transfer, Hold, Park, Camp, End, Conference
On Hold	Held		Any	Transfer, Resume, Park, Camp, End, Conference
On Hold (Remote)	Remote Held		Any	Transfer, Hold, End, Conference
Active (In Conference)	Active	*	Conference	Transfer, Hold, End
Held (In Conference)	Held	<b>Ai</b>	Conference	Resume, Transfer, End
Ringing In (Recalled Call)	Recalled	<b>~</b>	Terminator	Answer, Conference, End
Parked Call	Parked ( <dn>)</dn>		Any	Answer, End





# **Call Action Buttons**

The following table lists action buttons available in Receptionist Console.

Button	Description
Dial	This dials the number you entered in the <b>Dialer</b> .
CALL	This places a call to the selected contact or to a number from Call History.
Redial Redial	This redials the last dialed number.
MOB Mobile	This dials the contact's mobile number. ( <b>Note</b> : We do not currently support the ability to add mobile numbers in MyAccount.)
EMAIL E-mail	This brings up a new e-mail message window with the contact's e-mail address, allowing you to send an e-mail to the contact.
Transfer Transfer	This transfers a call to an ad hoc number entered in the Dialer.
Transfer	This transfers a call to a selected number or contact.
Transfer to Voice Mail	This transfers a call to the selected contact's voice mail.
ANS Answer	This answers an incoming call, answers an unanswered call for a contact, or resumes a held call.
HOLD Hold	This places a call on hold.
End	This ends a call.
CONF Conference	This establishes a conference call or adds a call to a conference.
CAMP Camp	This camps the call on a busy contact.
BARGE Barge In	This barges in on a contact's call.
PARK	This parks a call on a contact.
RECORD Record	This records a call.
PAUSE Pause	This pauses call recording.
Resume Resume	This resumes call recording.





Button	Description
STOP Stop	This stops recording a call.
MON Monitor	This starts monitoring the state of the selected contact, except if the contact is a virtual user. Virtual users cannot be monitored.
PROMOTE Promote	This promotes a selected call to the next higher priority bucket.
RETRIEVE	This retrieves a selected call from the queue to the supervisor's device.
Reorder	This changes a selected call's position in the queue.



FAQ

### Q: Are there any restrictions for the sign in process?

A: Yes, Receptionist Console does have a few restrictions for the sign in process. They are listed below.

- Receptionist Console does not support signing in as different users from the same machine at the same time.
- You can only have ONE active Receptionist Console session at a time.
- When you sign in from a second location, you are automatically signed out from the original location with the following message: "You have been signed out as you have signed in from another location."

# Q: When I make updates in MyAccount, will I see them immediately in Receptionist Console?

**A**: No, any updates that you make via MyAccount will appear in Receptionist Console the next time you launch the application.