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 Specifications

To successfully run Receptionist Console, your computer needs to have any of the following web browsers loaded and operable.

Browser Type	Version
Internet Explorer	11.0 only
Firefox	Version 54
Chrome	Version 57 and lower

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

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

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 **Password**. (**Note**: If you are unsure of your user ID or password, contact your MyAccount administrator.)
3.	(Optional) Check the **Stay signed in** box to automatically re-connect in the event of a disruption to the network connection.
4.	Click the **Sign In** button. **Result**: Receptionist Console starts and you are signed in. (See Figure 1).

Figure 1. Receptionist Console Sign-in page

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

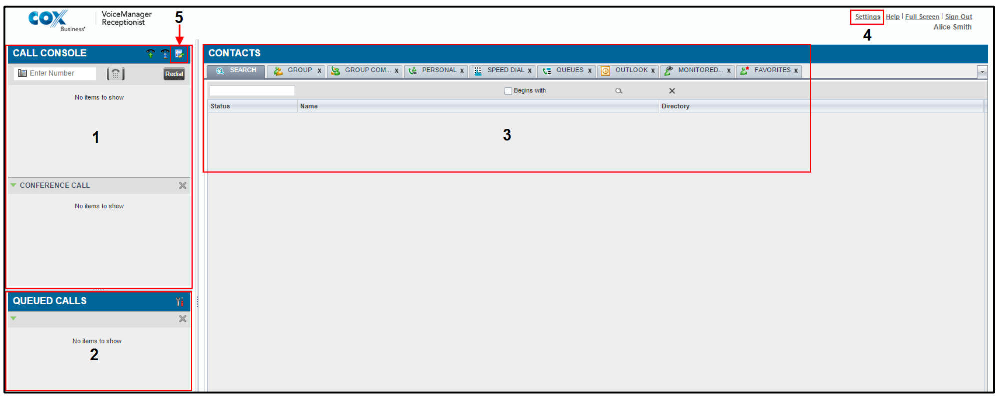
Introduction

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.

Figure 2. **Receptionist Console Main page**



Numeric Identifier	Name	Description
1	**Call Console pane**	View and manage your current calls.
2	**Queued Calls pane**	Manage calls that have been routed to a Call 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 dialog box**	View and return previous incoming calls.

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 Common	Contains a list of contacts and their phone numbers that 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

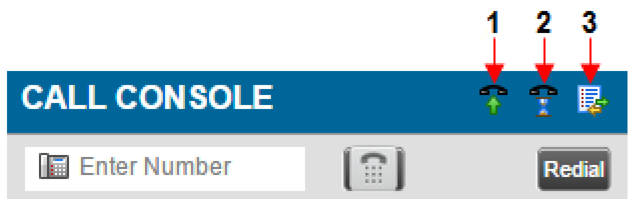
Introduction

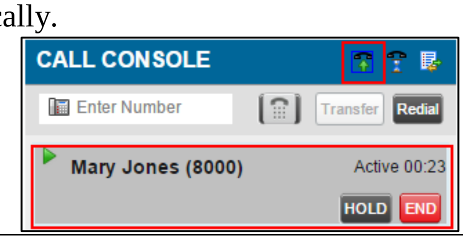
The first section we will review is the Call Console pane. You use this area of Receptionist Console to view and manage active calls for yourself and others in your organization.

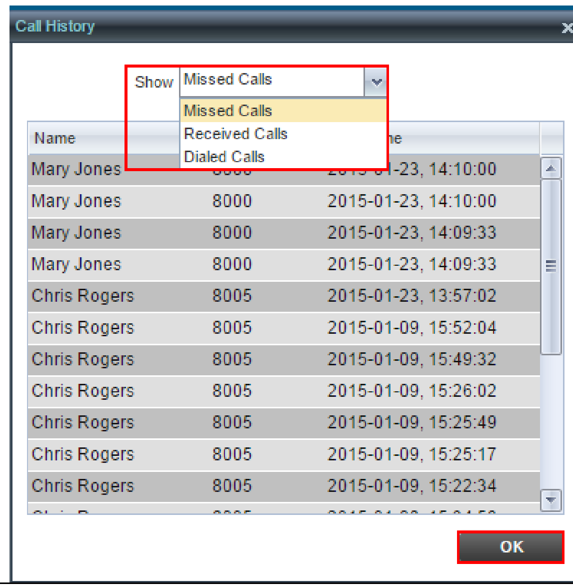
Diagram

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

Figure 3. <u>**Call Console title bar icons**</u>



Icon Numeric Identifier	Description
1 (Auto Answer)	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. 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 active and future incoming calls will be answered automatically. 
2 (Call Waiting)	Click the Call Waiting icon (number "**2**" in **Figure 3**) 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 Identifier	Description
3 (Call History)	The Call History function enables you to see a log of recent phone calls that you missed, received, and dialed. You can sort the calls by Name, Number, or the Time/Date stamp when you click the column heading. Click the Call History icon (number “**3**” in **Figure 3**) to open the log and select the type of calls you want to view from the **Show** drop-down menu. Figure 4. **Call History dialog** 

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.

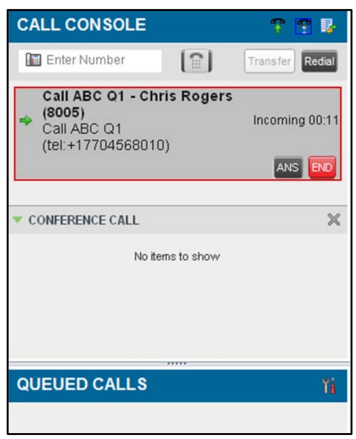
You may place an outgoing call when you enter the phone number in the text field and click the keypad icon. (**Note**: The buttons to the right, called ***action*** buttons, change depending on the context, and allow you to perform operations on calls.) In Figure 5, the **Redial** button appears.

Figure 5. <u>**Dialer**</u>

Answer Call Appearance

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

Figure 6. <u>**Call Console pane**</u>



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). **Note**: If an unanswered parked call rings back, the following information appears: Recall: <Caller’s name>; via: <Call parked against user>
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 icon	A visual representation of the current state of the call.
Call State name	A description of the call's current status.
Call duration [Held duration]	The duration of the call from the time the call was received. It accurately reflects how long the call has been present in the system. In addition, for held calls, the time a call has been on hold is also displayed.
Action buttons	Operations that you can currently take on the call.

How to Answer a Call

Use the following steps to answer an incoming call.

Step	Action
1.	Move the mouse over the call and click the **Answer**  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 Call Pickup

Use the following steps to answer a phone ringing at another extension.

Step	Action
1.	Expand any contact directory and find the contact for which an incoming call is ringing.
2.	Click the **Answer** ANS button.

How to Hold/Resume Calls

You can only put an active call on hold. Use the following steps to use Call Pickup.

Step	Action
1.	To put a call on hold, move the mouse over an active call and click the **Hold** HOLD 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 END button or hang up the phone to end a call.

Conference Call Functionality

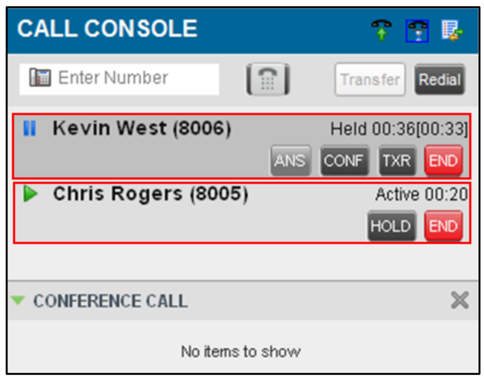
Introduction

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)**



How to Conference a Call

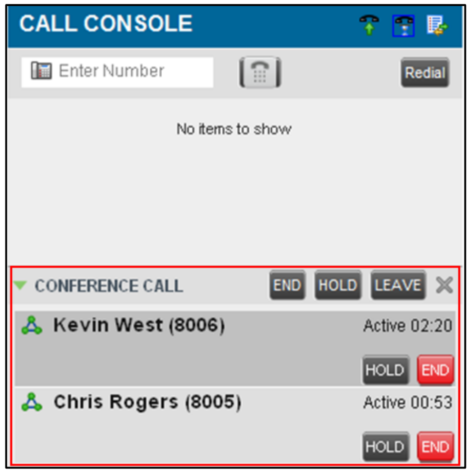
Use the following steps to conference two calls.

Step	Action
1.	Answer the first incoming calling line and click the **Hold** button.
2.	Answer the second incoming calling line and click the **Conf** button. **Result**: The two parties are now in conference and appear in the **Conference Call** 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 8. **Conference Calls pane**



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.

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.

Figure 9. Queued Calls panel – screen view

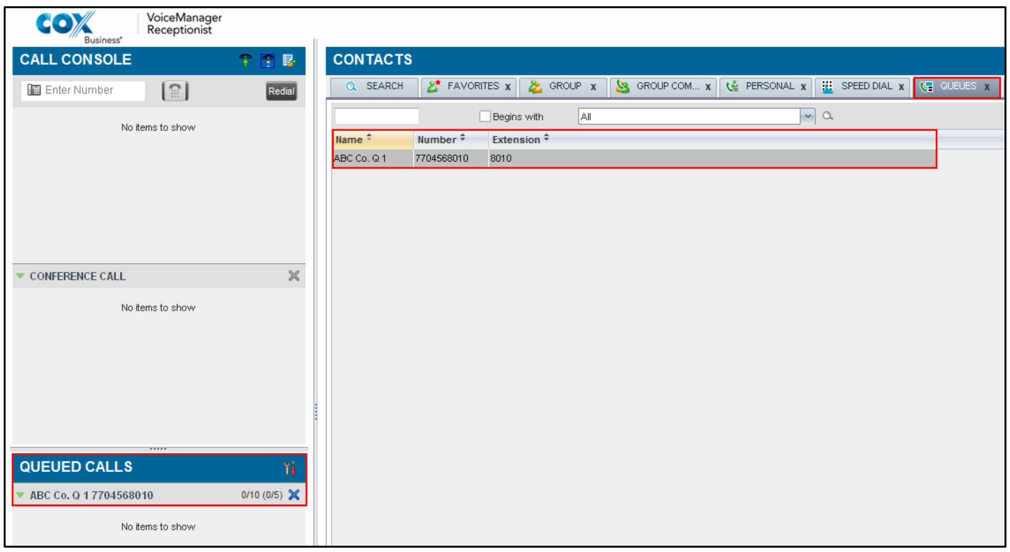


Figure 10. Queued Calls panel – panel view

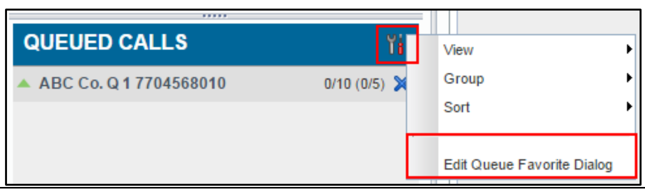
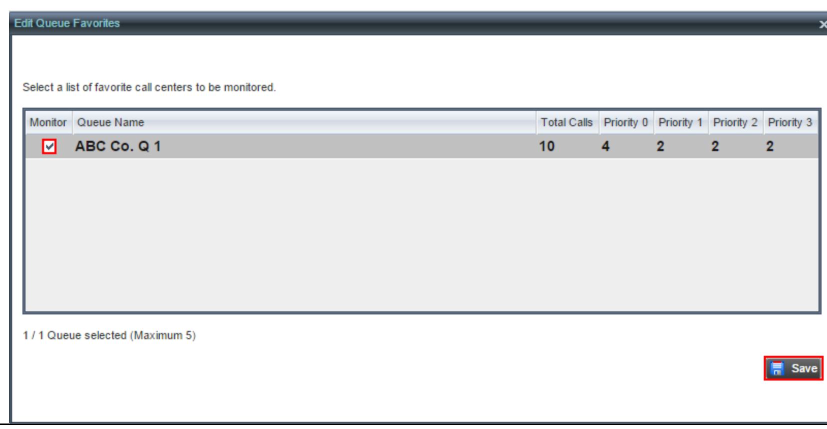
Call Queue Management

Select Call Queue to Manage

After you sign in to Receptionist Console, select the Call Queue(s) you want to manage (up to five).

Steps to Select a Call Queue

Use the following steps to select a call queue.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>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. Queued Calls – Options – Edit Queue Favorite Dialog

</td></tr>
<tr><td>2</td><td>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. Edit Queue Favorites

</td></tr>
<tr><td>3.</td><td>Click the Save button.
Result: The selected call centers appear in your Queued Calls pane.</td></tr>
</table>

View, Retrieve, and Transfer Queued Calls

Introduction

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 **Expand** button for that queue.

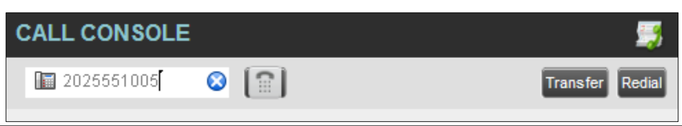
How to Retrieve a Call from the Queue

Use the following steps to retrieve a call from the queue to your phone device.

Step	Action
1.	To retrieve a call from the queue, in the **Queued Calls** pane, click the call to expand it and click **Retrieve** RETRIEVE for that call.
2.	Once you retrieve the call, the call appears in the **Call Console**, and you treat it as any other call.

How to Transfer a Queued Call

Use the following steps to transfer a call from the queue to another number.

Step	Action
1.	In the **Queued Calls** pane, select the call.
2.	In the **Dialer**, enter the destination number and click the Transfer Transfer button. **Result**: The call is transferred and removed from the queue. Figure 13. Ad Hoc Queue Transfer 

How to Transfer Calls Between Queues

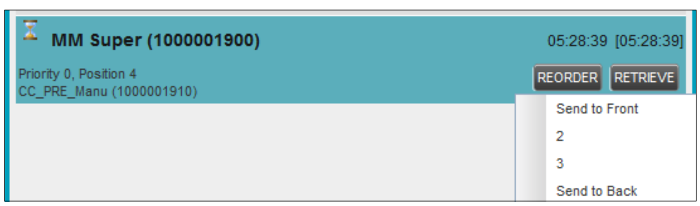
Use the following steps to transfer a call from one queue to another.

Step	Action
1.	In the **Queued Calls** pane, select the call.
2.	In the **Contacts** pane, expand the **Queues** tab.
3.	Click the target queue and click the **Transfer**  button for that queue. **Result**: The call is transferred and removed from the original queue.

Change Position of Call in Queue

How to Change Call Queue Position

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

Step	Action
1.	In the **Queued Calls** pane, click the call and click **Reorder.** . Figure 14. Reorder Queued Call  **Note**: 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 **Send to Back** and **Send to Front** options.
2.	In the drop-down box that appears, select the new position in the queue. **Result**: The call is placed at the new position.

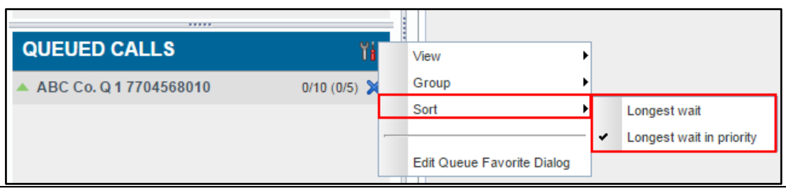
Sort Queued Calls

Introduction

Queued calls can be sorted according to their *total* wait time or their wait time *in the current priority bucket*. 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 following steps to sort calls in a queue.

Step	Action
1.	In the **Queued Calls** pane, click **Options** .
2.	Select **Sort** and then the ordering option you want. (**Note**: This operation applies to your view of all call queues in Receptionist Console.) Figure 15. Queued Calls – Options – Sort 

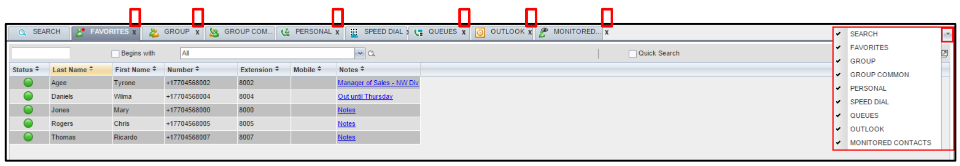
Title Bar Tabs

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.

Figure 16. **Title Bar Options**

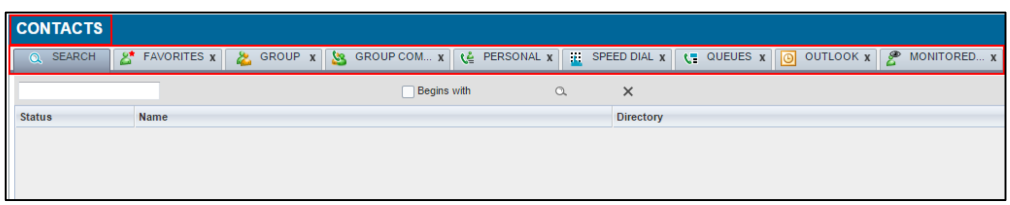


Contacts

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**



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.

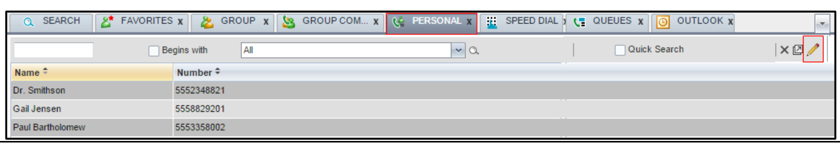
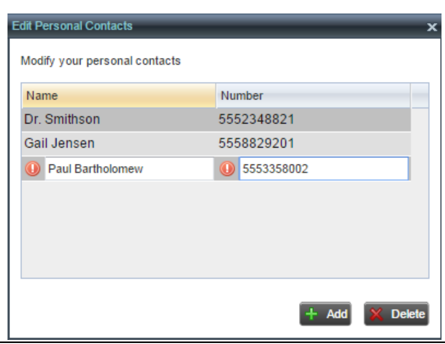
Add a Personal Contact

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 **Personal** tab, click **Edit** . The **Edit Personal Contacts** dialog box appears. Figure 18. Personal tab 
2.	Click **Add**. A new line is added below the existing entries, allowing you to define a new entry. Figure 19. Edit Personal Contacts - Add Entry 
3.	In the **Name** text box, enter the contact's name or description, as you want it to appear.
4.	In the **Number** text box, enter the phone number of the contact.

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

Delete a Personal Contact

How to Delete a Personal Contact

Use the following steps to delete a personal contact.

Step	Action
1.	In the **Personal** tab, click **Edit** . The **Edit Personal Contacts** dialog box appears.
2.	Select the entry to delete and click the **Delete** button. **Result**: The entry is removed from the list.

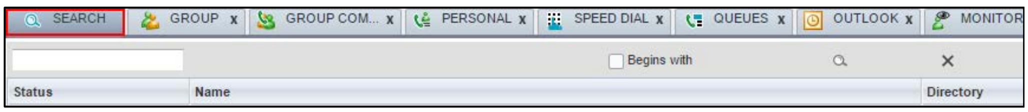
Search

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.

Figure 20. **Search tab**



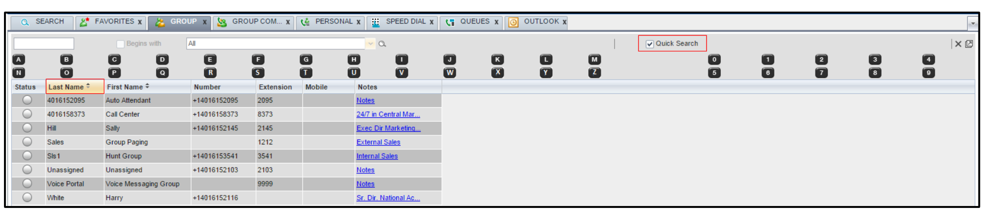
Quick Search

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.

Figure 21. **Quick Search**



How to Perform a Quick Search

Use the following steps to perform a 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 **Quick Search** 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 the directory.
5.	To perform another search on the same column, select another character. The new search is performed on the original directory and not on the results of the previous search.

Regular Search

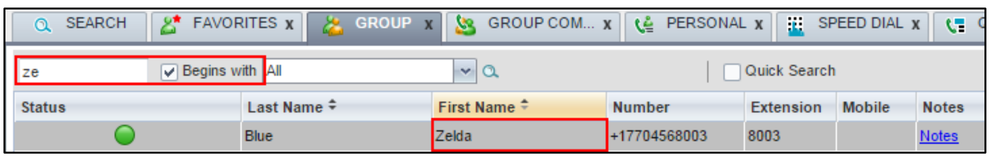
Introduction

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



How to Search in a Specific Directory

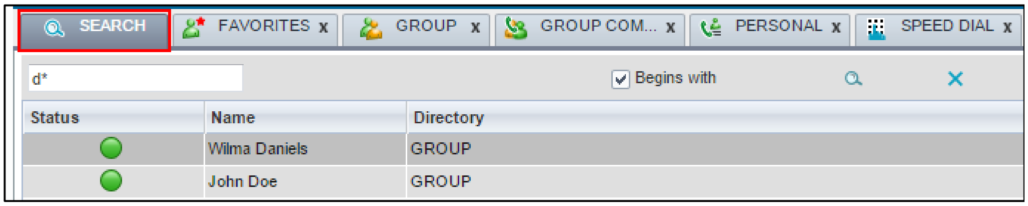
Use the following steps to search in a specific directory.

Step	Action
1.	Select the directory.
2.	Make sure that the **Quick Search** box is unchecked.
3.	In the **Search** 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 **Begins with** 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 **Search** 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.

	• 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 (**Begins with** 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 (**Begins with** 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 **Reset** ☒.

Diagram

Figure 23. **Contacts Pane – Search Results in Search tab**



How to Search in All Directories

Use the following steps to search in all directories.

Step	Action
1.	Click the **Search** tab.
2.	In the **Search** 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 **Begins with** box. Otherwise, the search results also include contacts that contain the entered string.
4.	Click the **Search** button . The text you enter is matched against all columns in all directories (except for the **Notes** 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 **Pullout** button, which becomes active. **Result**: 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 Search Results

After you perform the original search, create a directory from the search results.

Perform a new search in the new directory.

Note: Searching within the search results cannot be performed on the same column that the original search was performed.

Order Directory Entries

Introduction

Receptionist Console allows you to order directory entries in ascending or descending order. The columns by which the directory can be ordered have the sort icon displayed ⬍ next to their name. The following table lists the directories and the columns by which they can be ordered.

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

How to Sort the Order of Directory Entries

The sorting order for the **Status** column is as follows (from highest to lowest): Private, On a Call, Ringing, Away, In a Meeting, Call Forwarding Always, Do Not Disturb, and Available.

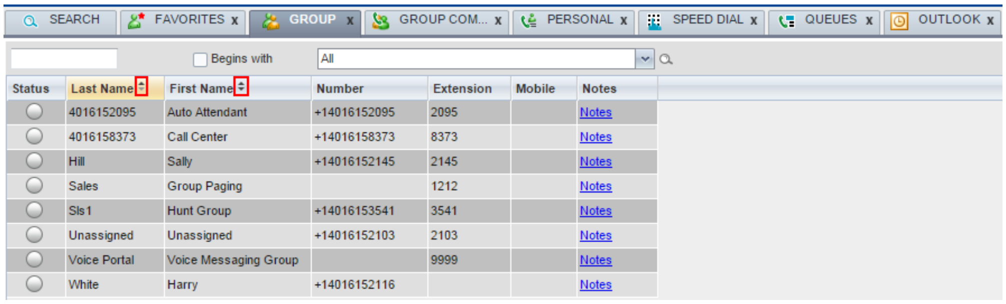
Use the following steps to order a directory.

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**



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

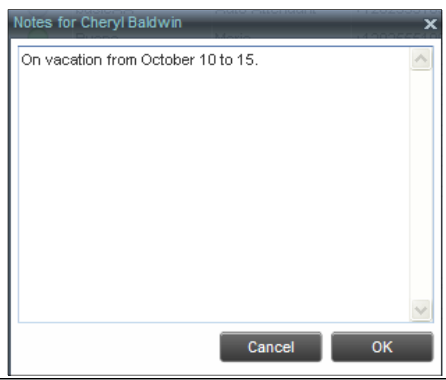
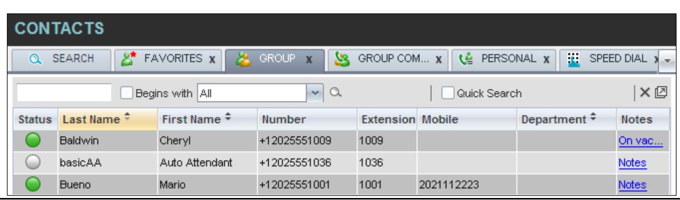
Contact Notes

Introduction

Receptionist Console allows you to make notes about the contacts in your **Group, Favorites,** or **Monitored Contacts** directory. Notes are designed to quickly store and provide brief information about the contact.

How to Create a Note about a Contact

Use the following steps to create notes about a contact.

Step	Action
1.	Open one of the directories and click the Notes link on the contact's line item. **Result**: The Notes for <Contact Name> dialog box appears.
2.	Enter the desired text or view or modify the existing text in the **Notes** text box. Figure 25. Notes field 
3.	To save your changes and close the dialog box, click the **OK** button. **Result**: The note appears in the contact's line item in the Notes column. Figure 26. Notes 
4.	To close the dialog box without saving, click **Cancel** button.

Monitoring

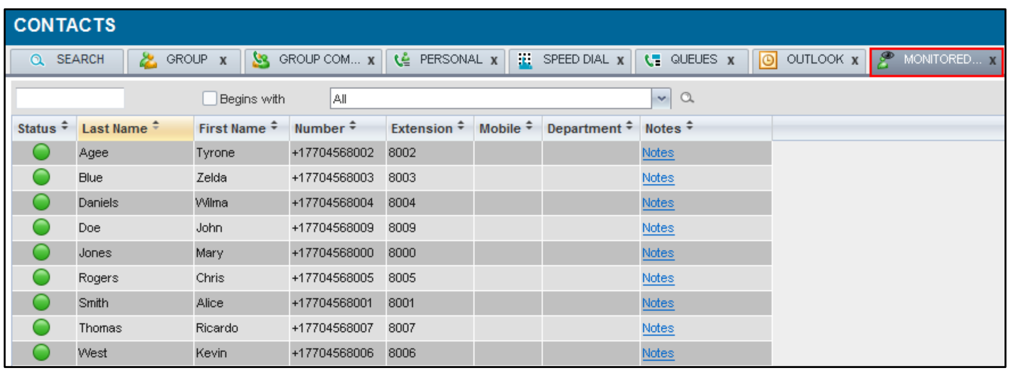
Introduction

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. **Monitored Contacts**



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

Static Monitoring – Favorites Tab

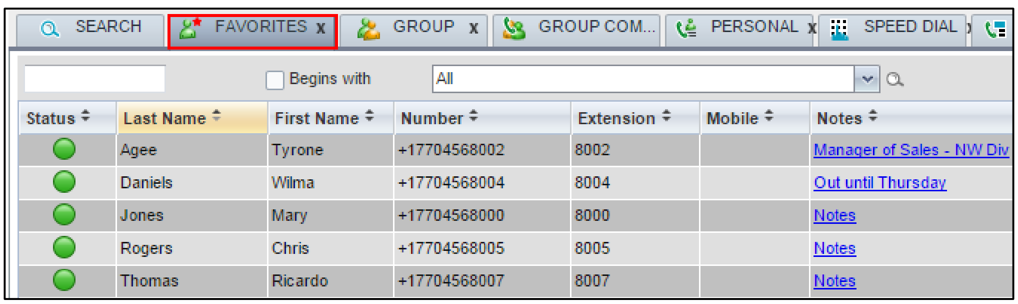
Introduction

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.

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.

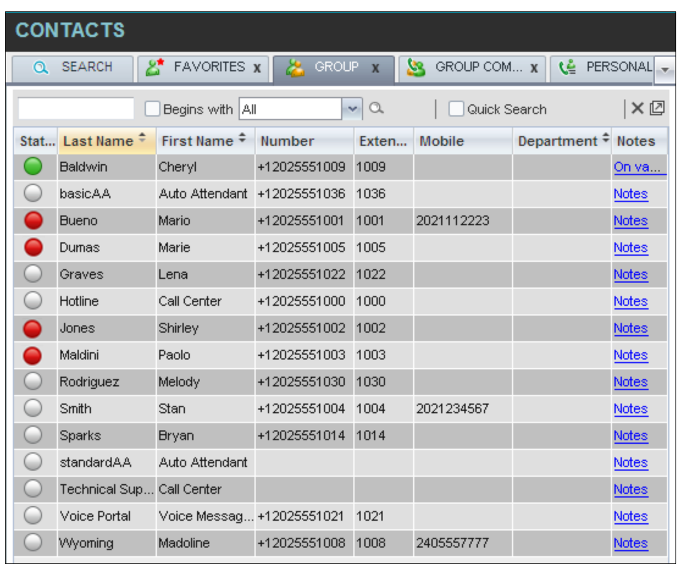
When the number of monitored contacts reaches the threshold, Receptionist Console changes the selection based on a "first in/first out" order. Therefore, those contacts that were selected originally are no longer monitored which allows for newly selected contacts to be monitored.

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.

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.

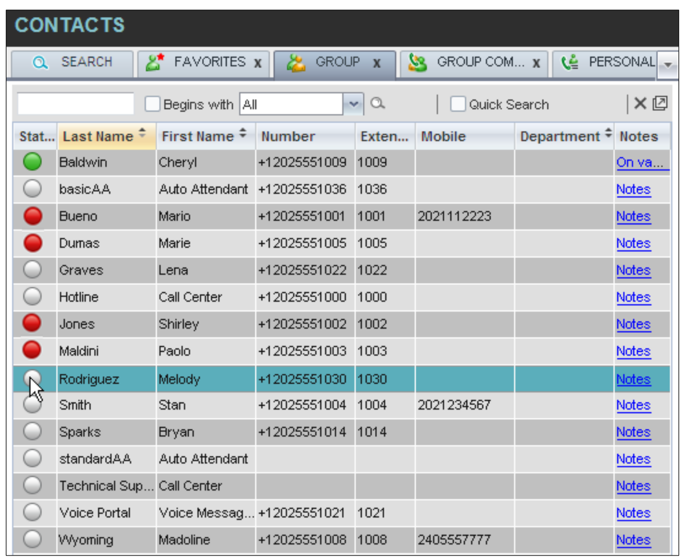
How to Monitor a Contact

Use the following steps to monitor a dynamic contact.

Step	Action
1.	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**



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.

The following table lists call states for contacts or extensions:

Icon	State in Receptionist Console	DND	CFA	Privacy	Exchange Calendar State*	Call State
	Private	N/A	N/A	On	N/A	N/A
	On a Call	N/A	N/A	Off	N/A	Active call
	Ringing	N/A	N/A	Off	N/A	Ringing call, no active calls
	Away	N/A	N/A	Off	Out of Office	No active calls
	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
	Unknown	N/A	N/A	N/A	N/A	N/A

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

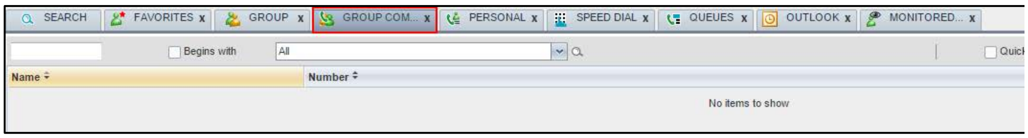
Group Common

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.

Figure 31. **Group Common tab**

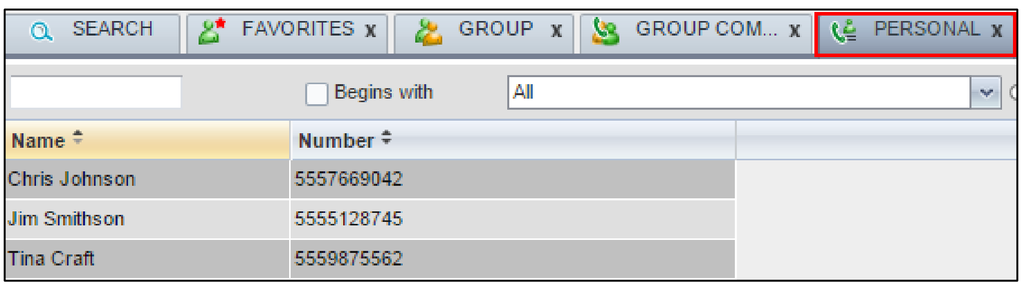


Personal

Introduction

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

Figure 32. **Personal (contacts) tab**



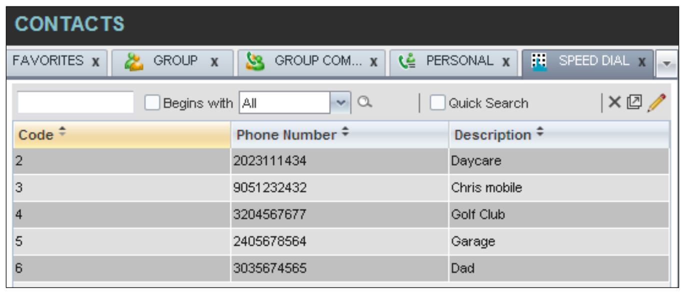
Speed Dial

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



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)

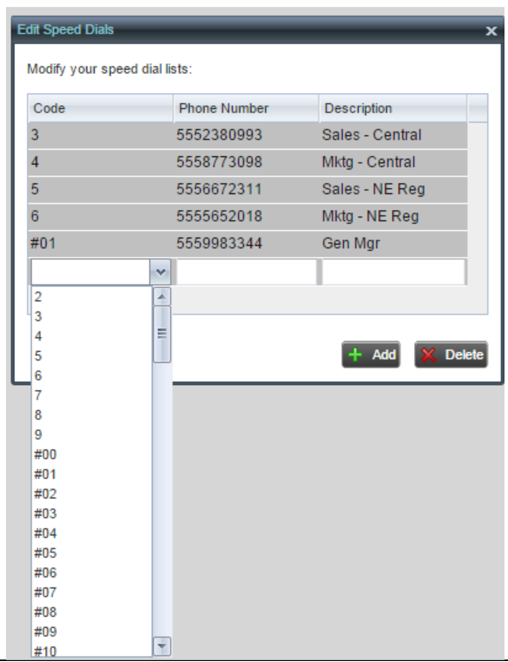
Add Speed Dial Entry

How to Add a Speed Dial Entry

Use the following steps to add a speed dial entry.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>In the Speed Dial tab, click Edit .
Result: The Edit Speed Dials dialog box appears.</td></tr>
<tr><td>2.</td><td>Click the Add button.
Result: A new line is added below the existing entries, allowing you to define a new entry.

Figure 34. Add New Speed Dial entries

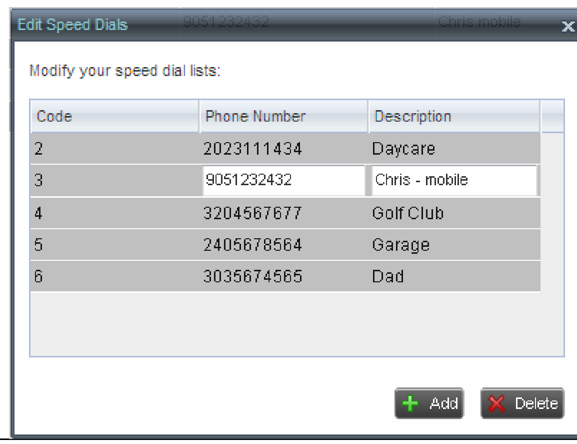


</td></tr>
<tr><td>3.</td><td>From the Code drop-down list on the left, select a speed dial code.</td></tr>
<tr><td>4.</td><td>In the Phone Number text box, enter the phone number to assign to the code.</td></tr>
<tr><td>5.</td><td>In the Description text box, enter a description that allows you to identify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

Modify Speed Dial Entry

How to Modify a Speed Dial Entry

Use the following steps to change a speed dial entry.

Step	Action
1.	In the **Speed Dial** tab, click the **Edit** button. **Result**: The **Edit Speed Dials** dialog box appears. Figure 35. **Edit Speed Dials Dialog Box – Modify Entry** 
2.	Double-click the entry to modify.
3.	Modify information as required.
4.	To save the changes, click anywhere in the dialog box outside the entry.

Delete Speed Dial Entry

How to Delete a Speed Dial Entry

Use the following steps to delete an entry from your speed dial.

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

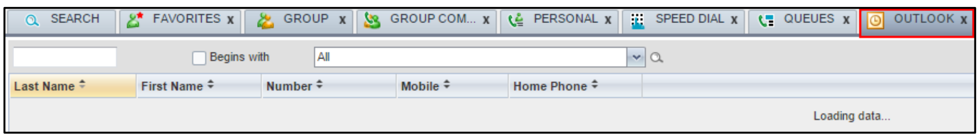
Outlook

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**



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**

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

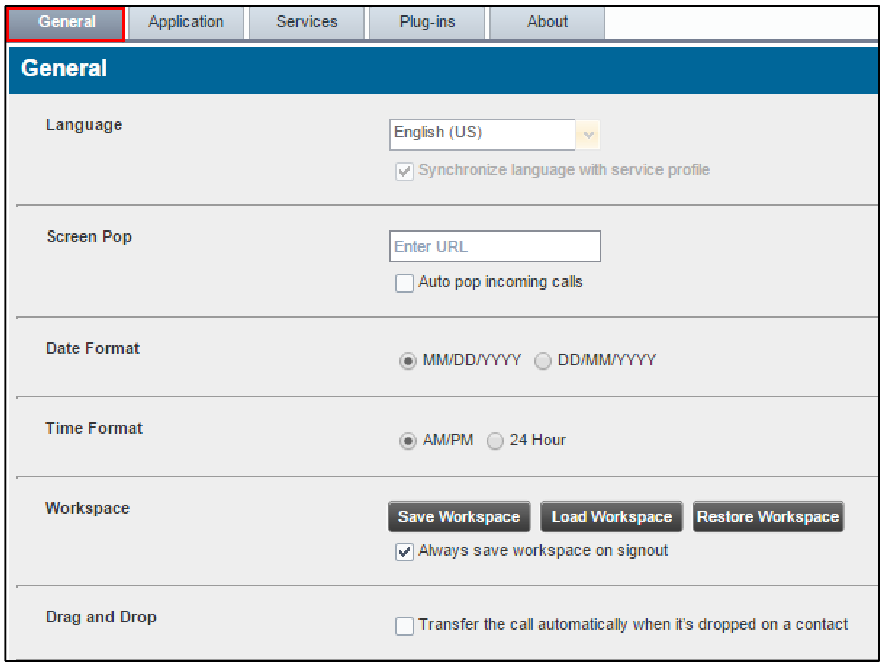
General Tab

Introduction

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

Diagram

Figure 38. **Settings – General**



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	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: • MM/DD/YYYY • DD/MM/YYYY
Time Format	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: • AM/PM • 24 hours

<table>
<tr>
<td>Workspace</td>
<td>
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.

The following elements can be customized:

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

Notes: 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.
Restore Workspace – This button, when clicked, restores the workspace to the system default configuration.
Always save workspace on sign out – When you sign out from the client, Receptionist Console asks you whether you

</td>
</tr>
</table>

	want to save your current workspace. To save your workspace automatically when signing out without being asked, check the **Always save workspace on sign out** box. To customize your workspace: Arrange the windows the way you like. Click the **Save Workspace** button to save the current configuration. To restore the system default, click **Restore Workspace**. At any time to return to the last saved configuration, click the **Load Workspace** button.
Drag and Drop	You use the **Drag and Drop** area to specify whether a call should be automatically transferred when dropped on a contact. **Transfer the call automatically when it's dropped on a contact –** 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.

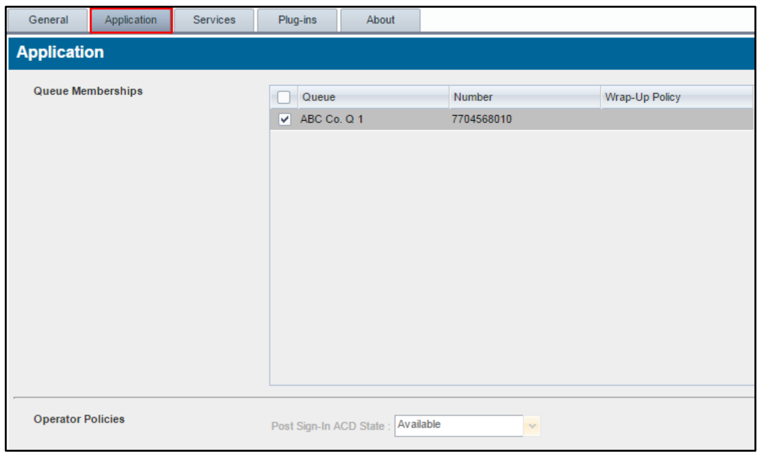
Settings - Application

Introduction

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

Diagram

Figure 39. **Settings – Application**



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

<table>
<tr><th>Part</th><th>Description</th></tr>
<tr><td>Queue Membership</td><td>These settings allow you to select which queues you want to join.
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>To join a specific queue, select the check box on the line for the queue.</td></tr>
<tr><td>2.</td><td>To join all queues, select the check box in the column header.</td></tr>
</table>
Note: If you are not allowed to join/leave a queue, the line for the queue is dimmed and you can only view your join status in the queue. To change your join status in a queue, 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.</td></tr>
<tr><td>Operator Policies</td><td>The Operator Policies setting allows you to select your post sign-in state in your queues.</td></tr>
</table>

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

Settings - Services

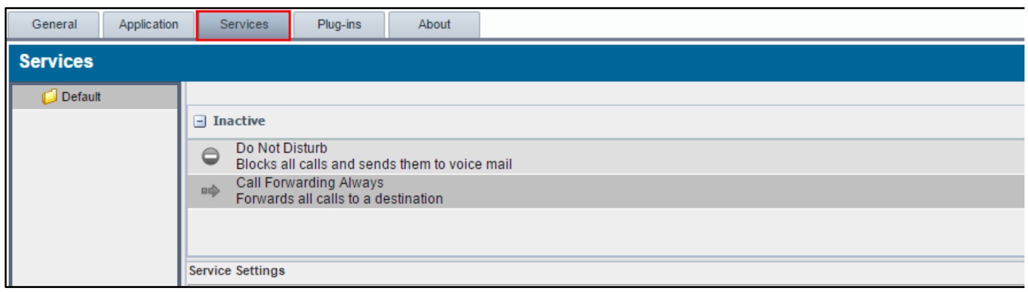
Introduction

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. **Settings – Services**



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 Always	When you activate this service, you need to provide the phone number to which your calls are forwarded. When the service is active, all your calls are forwarded to the specified number.

How to Activate a Service

Use the following steps to activate a service.

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

Settings – Plug-ins

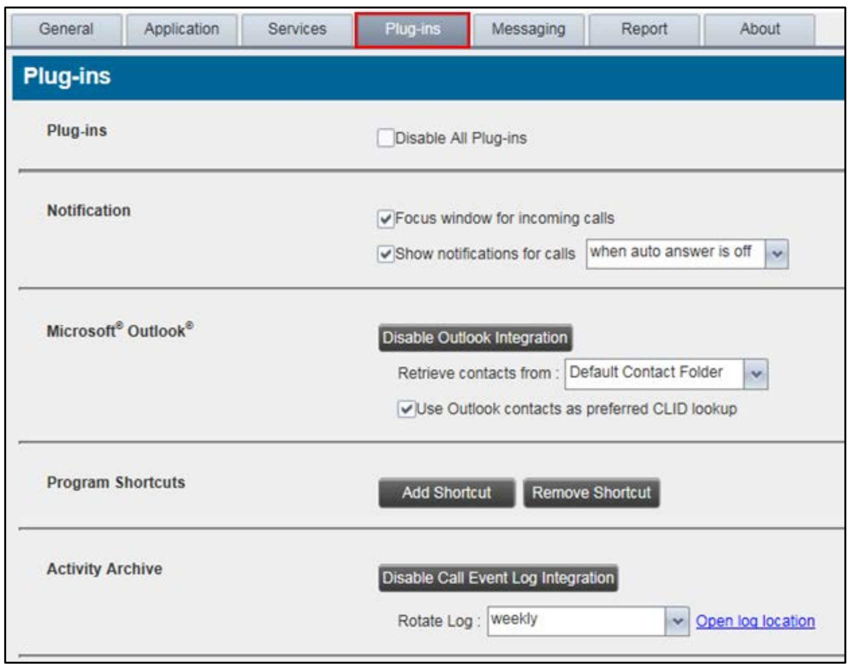
Introduction

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



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. The options you can set are as follows: • **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.

<table>
<tr><td></td><td>This does not work in Firefox. In Internet Explorer, there must be only one tab open in the web browser running Receptionist Console.
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.
This does not work if there are other tabs open in the same web browser window as Receptionist Console. In addition, if calls come within eight seconds of each other, the Call Notification pop-up window only appears for the first call of that series.</td></tr>
<tr><td>Microsoft Outlook</td><td>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.

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.

The options you can set are as follows:
<table>
<tr><th>Part</th><th>Function</th></tr>
<tr><td>Enable/Disable Outlook Integration</td><td>This determines whether Receptionist Console integrates with Outlook to provide you with access to your Outlook contacts. If Outlook integration is disabled, the corresponding desktop plug-in software components are not downloaded from Cox.</td></tr>
<tr><td>Retrieve contacts from</td><td>This option allows you to specify where to look for your Outlook contacts.</td></tr>
</table></td></tr>
</table>

<table>
<tr>
<td></td>
<td>
<table>
<tr><td>Use Outlook contacts as preferred CLID lookup</td><td>When this option is checked, Receptionist Console uses Outlook to try to identify a caller, when the caller ID is unknown.</td></tr>
</table>
Note: The Outlook Integration feature provides the following functionality: CLID lookup, saving vCards, and accessing and searching Outlook contacts. When using Microsoft Outlook 2010 or 2013 (32- or 64-bit edition), Outlook has to be running before Receptionist Console is launched for these functions to work.
</td>
</tr>
<tr>
<td>Program Shortcuts</td>
<td>
The Program Shortcuts plug-in allows you to create a desktop shortcut on a Windows platform which launches Receptionist Console in your default web browser when you click the icon.
<table>
<tr><th>Button Name</th><th>Function</th></tr>
<tr><td>Add Shortcut</td><td>Click this button to create a Receptionist Console shortcut on your desktop.</td></tr>
<tr><td>Remove Shortcut</td><td>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.</td></tr>
</table>
</td>
</tr>
<tr>
<td>Activity Archive</td>
<td>The Activity Archive plug-in allows you to store call event statistcs content locally on your computer where the log is stored.

The log is saved at a time interval (daily, weekly, monthly) that you select as a comma-separated value (CSV) file.</td>
</tr>
</table>

Settings - About

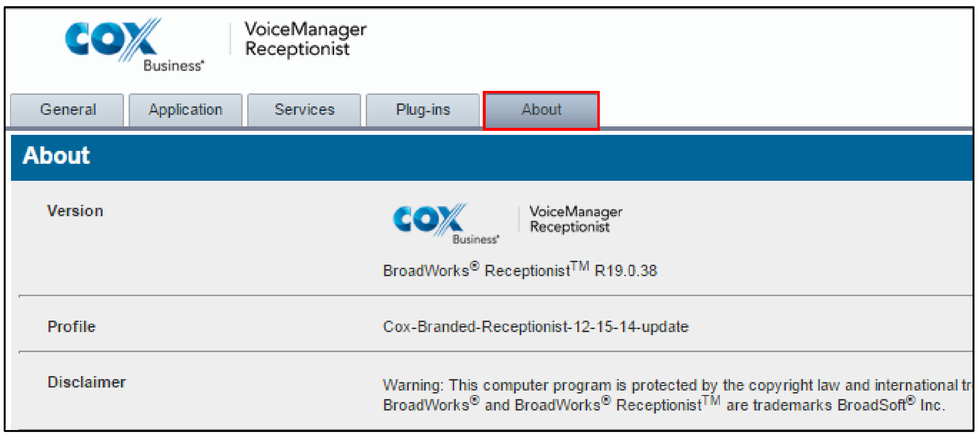
Introduction

The About tab displays the following information about Receptionist Console:

- software version
- client profile used
- copyright information

Diagram

Figure 42. **About tab**



Title Bar

Help

Introduction

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

Click the **Help** link in the upper right corner to open the User Guide.

Figure 43. **Help link**

Full Screen

Introduction

Removes toolbars at the top of the screen to display a larger view of the interface.

Figure 44. **Full Screen link**

Sign Out

Introduction

To exit Receptionist Console, click the **Sign Out** link at the upper right corner of the main interface.

Figure 45. **Sign Out link**

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 window**

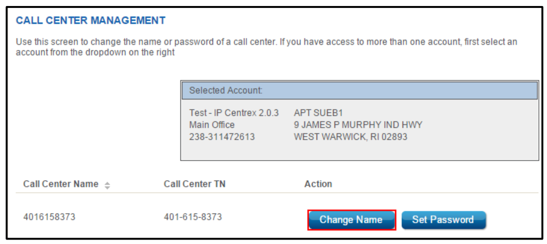
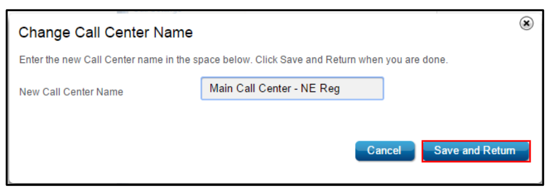


Figure 47. **New Call Center Name**



How to Change the Name of a Call Center

Use the following steps to modify 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 **Edit** button to the right of the call center you want to modify. **Result**: The **Change Call Center Name** dialog box displays.
4.	Click the **Change Name** button.
5.	Enter the **New Call Center Name.**
6.	Click the **Save and Return** button.

Change the Call Center Queue Password

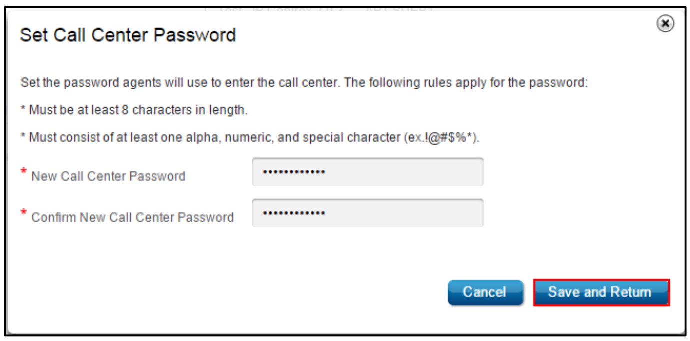
Introduction

Use the following steps to change or reset the password that users must enter to access the Receptionist Console. **Note**: 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 Call Center Management window, you can change the name of the queue(s) and reset or change the password.

Figure 1. Change Call Center Password



How to Change the Call Center Password

Use the following steps to modify 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 **Edit** 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 **Save and Return** button.

Manage Call Center Users

Introduction

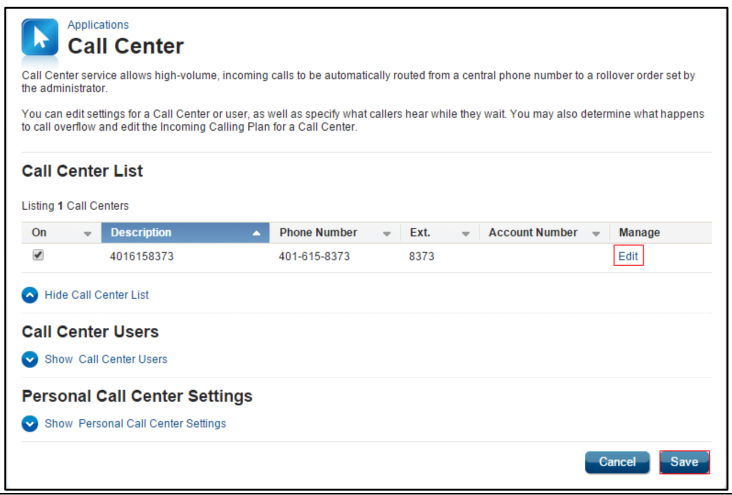
The Receptionist Console application allows you to add and remove users that are associated to a particular call center.

How to Manage Call Center Agents

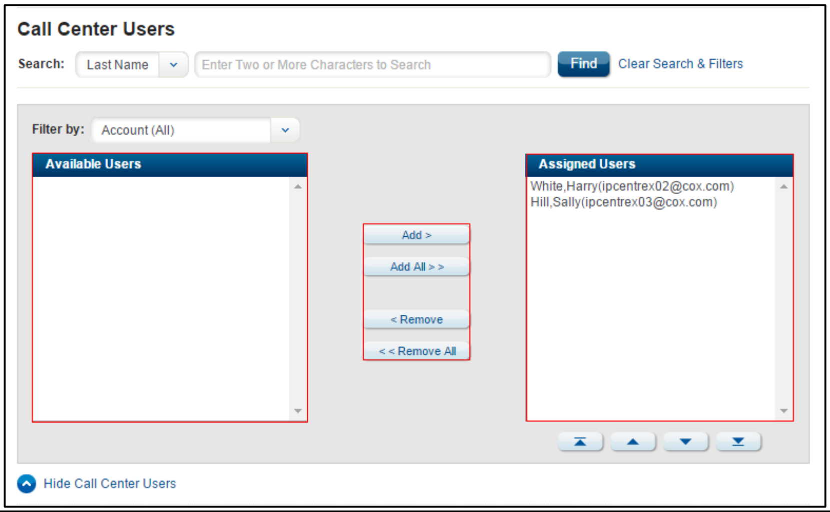
Use the following steps to manage call center agents.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Log into MyAccount and click the MyAccount menu.</td></tr>
<tr><td>2.</td><td>Click the Applications tab.</td></tr>
<tr><td>3.</td><td>Click the Call Center link.</td></tr>
<tr><td>4.</td><td>Click the Edit 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>



</td></tr>
<tr><td>5.</td><td>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.)</td></tr>
</table>

6.	From the list of **Available Users**, select the person(s) you want to assign to a call center or remove from a call center and click the **Add** or **Remove** button, respectively. a. To add the entire group of available users, click the **Move All** button. To move the assigned users back to the **Available Users** panel, click the **Remove All** 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** 
7.	Click the **Save and Return** 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:

> **Entrance Message** – *"Your call is very important to us. Please wait for next available agent"*.
>
> **Estimate Wait Message** (this is a system-recorded greeting and is configurable by a Cox administrator only) – *"You are caller number <x> in queue. Please hold"*.
>
> **Comfort Message** – *"Your call is very important to us. Please wait for the next available agent"*.
>
> **Overflow Message** – *"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.

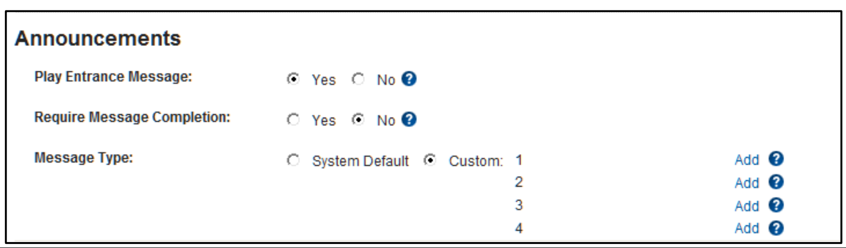
Activate Entrance Messages

Introduction

Entrance messages provide information to callers before their call is answered by an operator.

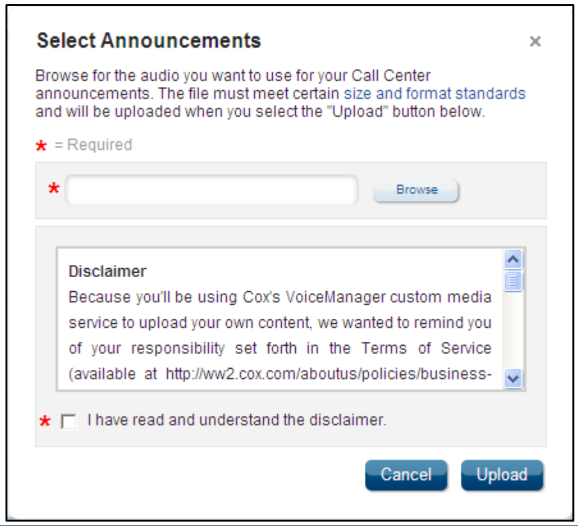
How to Activate an Entrance Message

Use the following steps to configure and activate an entrance message.

Step	Action
1.	Log into **VoiceManager MyAccount** and click the **VoiceManager MyAccount** menu.
2.	Click the **Applications** tab.
3.	Click the **Call Center** link.
4.	Click the **Edit** 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. **Result**: All of the **Announcement** 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 
7.	Select the **Require Message Completion Yes / No radio button** to define whether callers will hear the entire initial audio greeting.
8.	From the **Message Type** 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 **Browse** 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.

<table>
<tr><td></td><td>

Figure 51. **Disclaimer dialog**



</td></tr>
<tr><td>10.</td><td>Click the Upload button.
Result: The file appears in the Custom list.</td></tr>
<tr><td>11.</td><td>Click the Save and Return button.</td></tr>
</table>

Activate Estimated Wait Messages

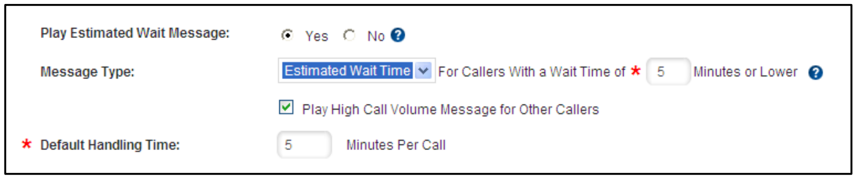
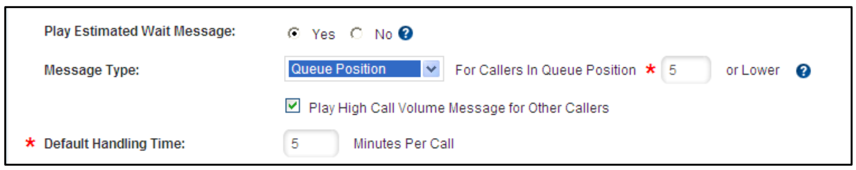
Introduction

The Estimated Wait Message type provides your caller with information about the amount of time it may take before their call is answered. You may give them an amount of time they can expect to wait *or* inform them of where their call is in the queue.

How to Activate an Entrance Message

Use the following steps to configure and activate an estimated wait time or wait queue message.

Step	Action
1.	Log into **VoiceManager MyAccount** and click the **VoiceManager MyAccount** menu.
2.	Click the **Applications** tab.
3.	Click the **Call Center** link.
4.	Click the **Edit** 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. **Result**: All of the **Announcement** 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 **Message Type** drop-down menu, select the **Estimate Wait Time** option if you want callers to hear how long they have to wait before their call is addressed. Figure 52. Estimated Wait (Time) Message  OR Select the Queue Position option to announce the callers' position in the wait line. Figure 53. Estimated Wait (Queue) Message 
8.	For either **Message Type**, enter a number in the **For Callers With a Wait Time of <x> Minutes or Lower** or **For Callers in Queue Position <X> or Lower** text field. The digit you enter defines the trigger value for either the *amount of time* callers can expect to wait before their call is answered *or* the *number of calls* ahead of them. In Figures ~~8~~ 6 and ~~9~~7, callers with a wait time of five minutes or lower will hear the **Estimated Wait Time** message; and callers with five calls ahead of them will hear the **Queue Position** message.
9.	Check the **Play High Volume Message for Other Callers** checkbox to initiate a message to callers who have an extended wait time or number of calls ahead of them.
10.	In the **Default handling time** 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.

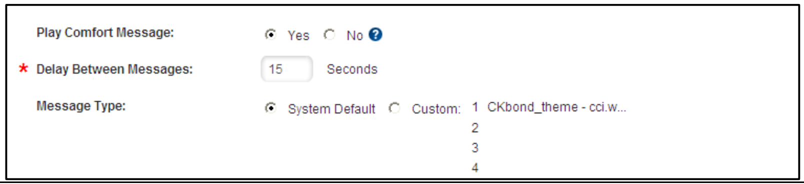
Each of the announcement functions is separate. This is good to know for anyone who is recording custom messaging, such as if a voice over ad is playing on hold, the comfort messaging starts at the designated interval(s) that is established in the comfort messaging screen.

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.

How to Create a Comfort Message

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

Step	Action
1.	Log into **VoiceManager MyAccount** and click the **VoiceManager MyAccount** menu.
2.	Click the **Applications** tab.
3.	Click the **Call Center** link.
4.	Click the **Edit** 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. **Result**: All of the **Announcement** options display.

6.	Select the **Play Comfort Message Yes / No radio button** to activate or deactivate, respectively, a message that callers hear while they are waiting to be answered. Figure 54. **Comfort Message** 
7.	In the **Delay Between Message <x> Seconds** text field, enter the time that will elapse before the comfort message plays again.
8.	From the **Message Type** 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.
9.	Click the **Browse** 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 ~~7~~5.
10.	Click the **Upload** button. **Result**: The file appears in the **Custom** list.
11.	Click the **Save and Return** button.

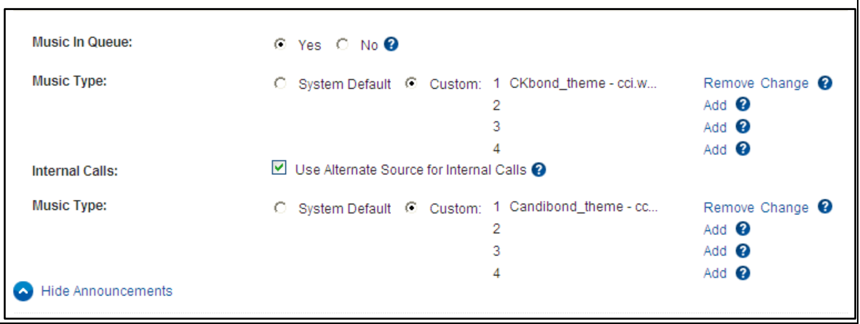
Activate Music in Queue

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 Create Music in Queue

Use the following steps to configure and activate music or messages to play for calls in a queue.

Step	Action
1.	Log into **VoiceManager MyAccount** and click the **VoiceManager MyAccount** menu.
2.	Click the **Applications** tab.
3.	Click the **Call Center** link.
4.	Click the **Edit** 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. **Result**: All of the **Announcement** options display.
6.	Select the **Music in Queue Yes / No radio button** to activate or deactivate, respectively, music that callers hear while they are waiting to be answered. Figure 55. Music in Queue 
7.	From the **Music Type** section, select the radio button to allow callers to hear the **System Default** music or a **Custom** music choice. (**Note**: If you click the **Custom** radio button, click the **Add** link to select the music file.) **Result**: A **Select Announcements** dialog box displays.
8.	Select the **System Default** radio button to use packaged music or select the **Custom** radio button to use personalized content. **Note**: If you select **Custom**, click the **Browse** button to locate and upload the file(s).

9.	Click the **Browse** 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 **Upload** button. **Result**: The file appears in the **Custom** 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 **Save and Return** 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.

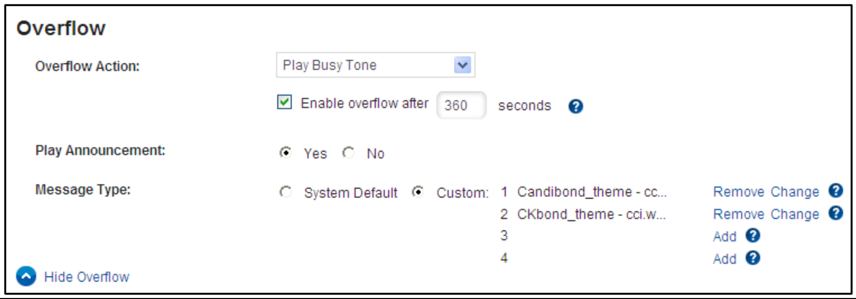
How to Configure Overflow Messaging

Use the following steps to configure the Overflow function.

Step	Action
1.	Log into **VoiceManager MyAccount** and click the **VoiceManager MyAccount** menu.
2.	Click the **Applications** tab.
3.	Click the **Call Center** link.
4.	Click the **Edit** 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. **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.)

<table>
<tr><td>7.</td><td>Select the Play Announcement Yes / No radio button to define whether you want your callers to hear a message you have configured for overflow calls.

Figure 56. <u>Overflow Message configuration window</u>


</td></tr>
<tr><td>8.</td><td>From the Message Type section, select the radio button to allow callers to hear the System Default message or a Custom message choice. (Note: If you click the Custom radio button, click the Add link to select the message file.)
Result: A Select Announcements dialog box displays.</td></tr>
<tr><td>9.</td><td>Click the Browse 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 ~~7~~5.</td></tr>
<tr><td>10.</td><td>Click the Upload button.
Result: The file appears in the Custom list.</td></tr>
<tr><td>11.</td><td>Click the Save and Return button.</td></tr>
</table>

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

Introduction

In Windows 98, select **Start>Programs>Accessories>Multimedia>Sound 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 **File** menu, click **Properties**. The **Properties for 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 **OK**. **Tip**: You may want to save this format at this point so that you can select it easily in the future.
5.	In the **Properties for Sound** dialog box, click **OK**.
6.	Click **Record** on the Sound Recorder. Speak clearly into your PC microphone and record your message. When you have finished, click **Stop**. To listen to your message, click **Play**. If you want to re-record your message, repeat this step.
7.	When you are satisfied with your message, select **Save As** from the **File** menu and name it with a .WAV extension.
8.	Enter the name of your recording and click **OK**. To exit without saving, click **Cancel**.

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.

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

Appendix A: Steps for Using Plug-Ins

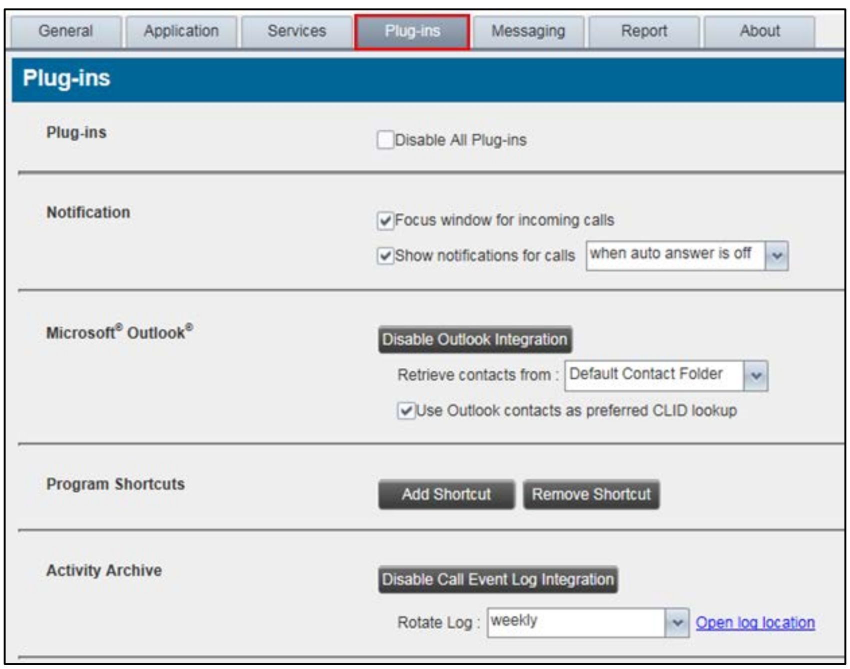
The Call Center Console client requires your computer to have Java JRE 1.6 or higher installed before you proceed with the steps in this section.

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



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.

7. 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)

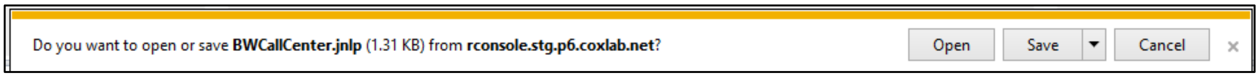


Figure 4. Downloading and Verifying Application pop-up windows

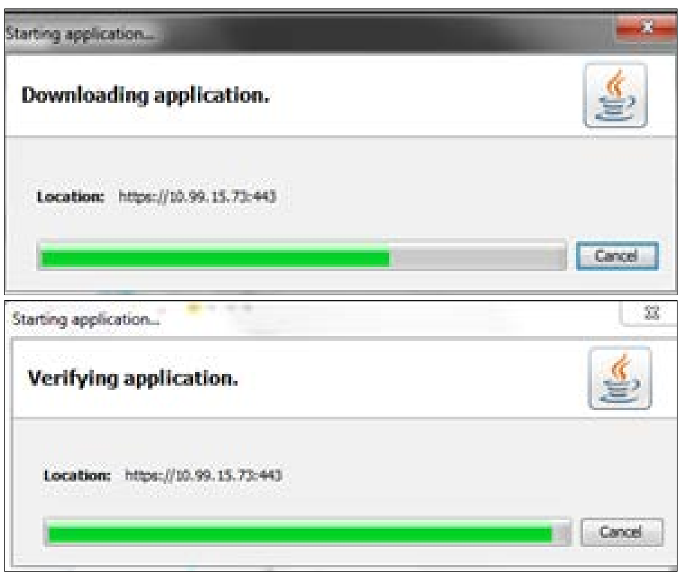


Figure 5. **“Do you want to run this application?” Dialog Box**

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.)

Note: If you refresh the browser after the local HTTPS server has started, the JNLP file is not downloaded again and the HTTPS server continues to initialize the desktop integration features.

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

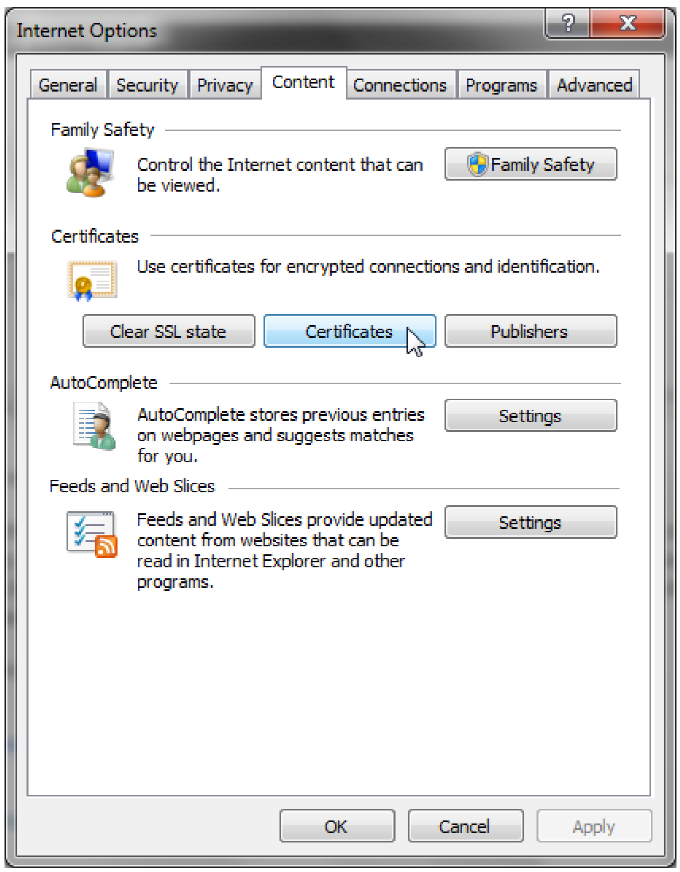
Follow these steps to add the desktop plug-in certificate to the Windows certificate store.

Using Internet Explorer

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

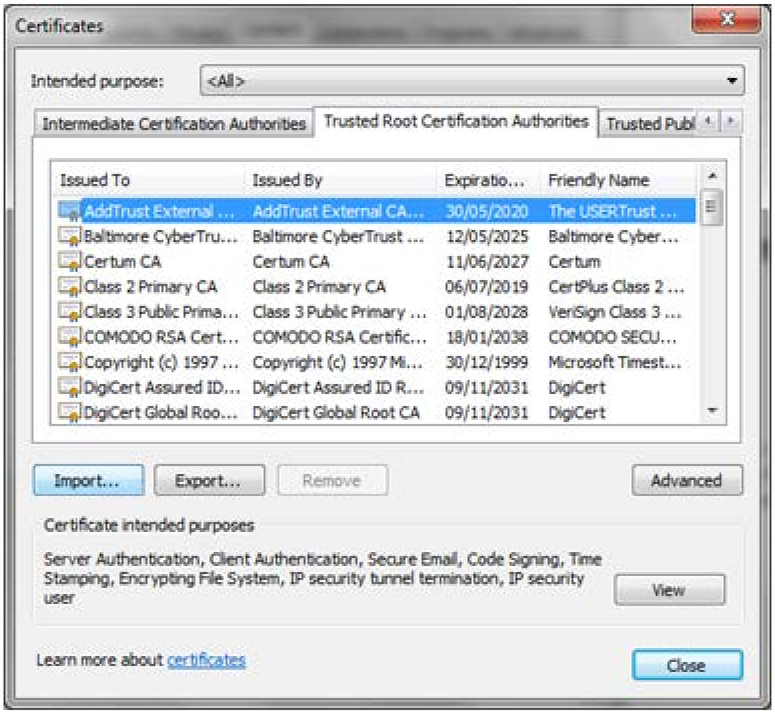
1. From the Internet Explorer Menu bar, select **Tools**, and then **Internet Options**.
   Result: The **Internet Options** dialog box appears.

Figure 6. Internet Explorer – Internet Options



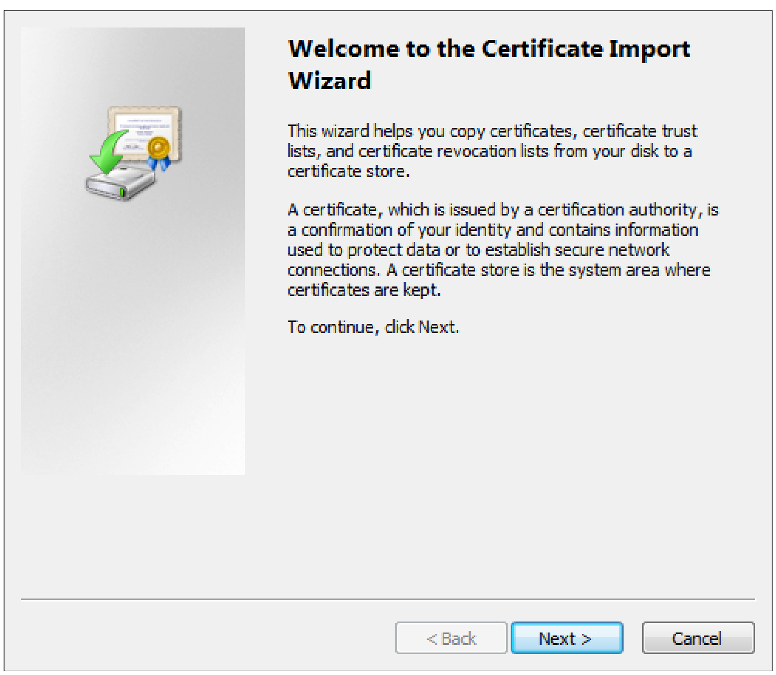
2. Click the **Content** tab, and then the **Certificates** button.
   Results: The **Certificates** dialog box appears.

Figure 7. **MS Windows – Certificates**



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

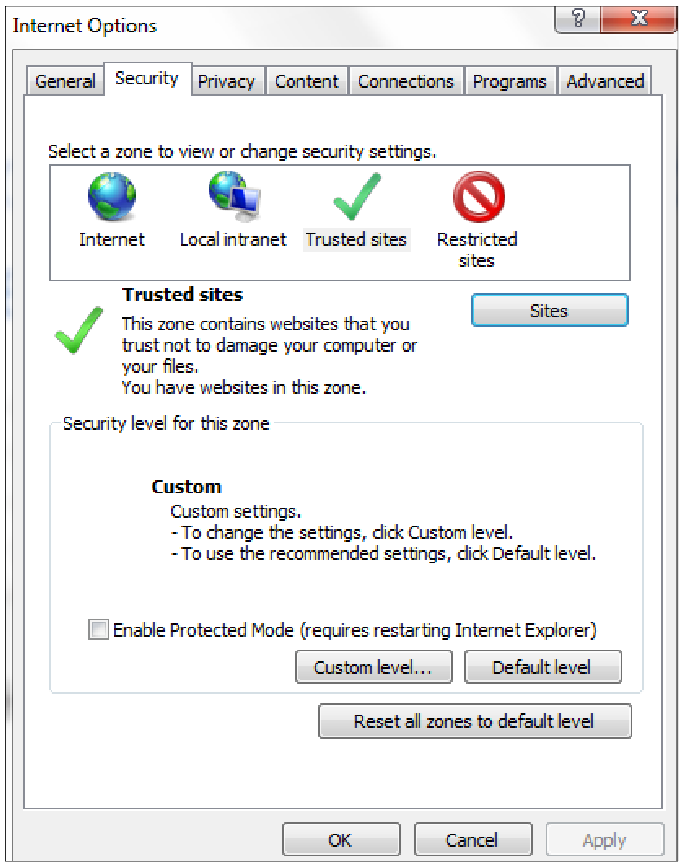
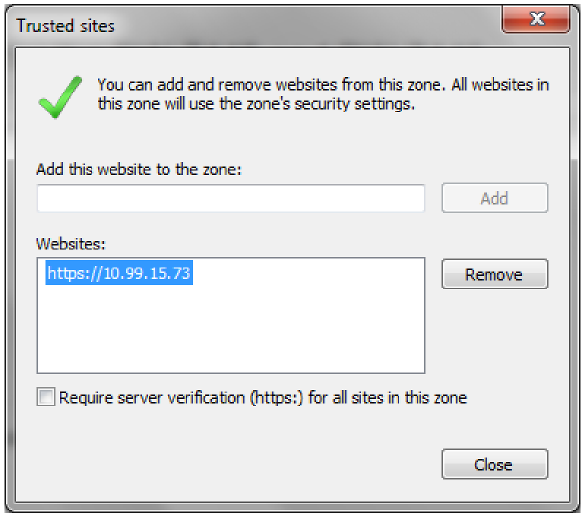
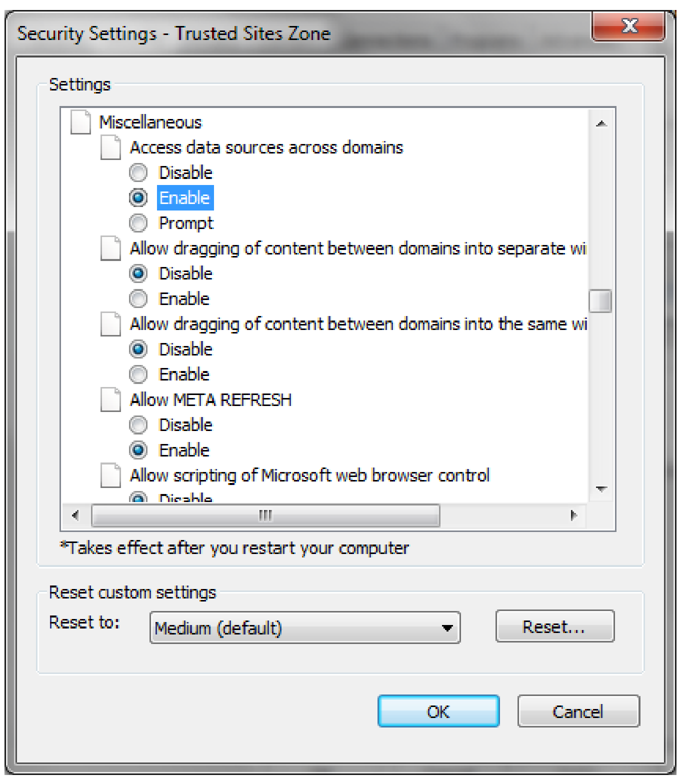


Figure 10. **Internet Explorer – Trusted Sites**



9. In the **Add this website to the zone** text field, enter the Call Center client URL, and then click the **Add** button.
   Result: The URL appears in the **Websites** text box.
10. Click the **Close** button.
11. 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**



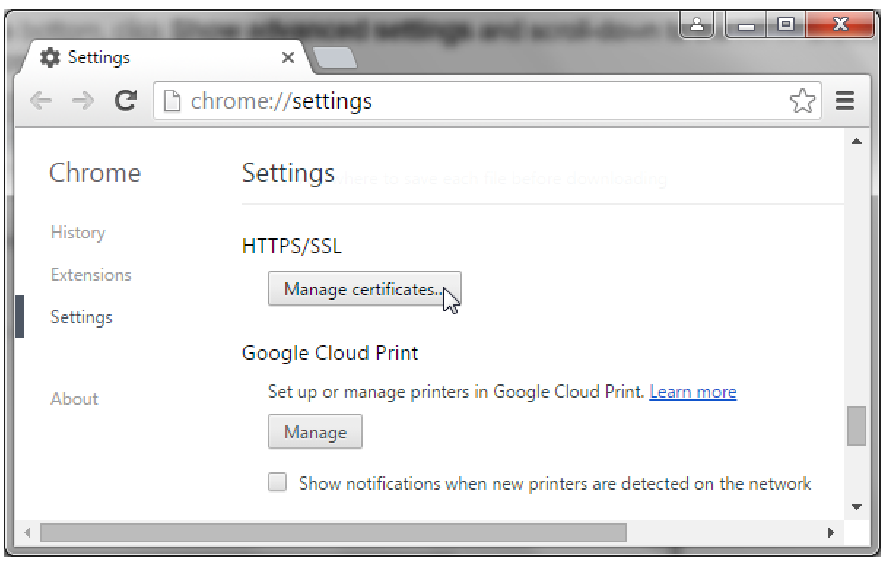
12. Scroll down to the **Miscellaneous** > **Access data sources across domains** menu option and click the **Enable** radio button.
13. Click the **Yes** button in the Warning! dialog box that appears.
14. Click the **OK** button, and then click the **OK** button in the Internet Options window to close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

Using Google Chrome

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

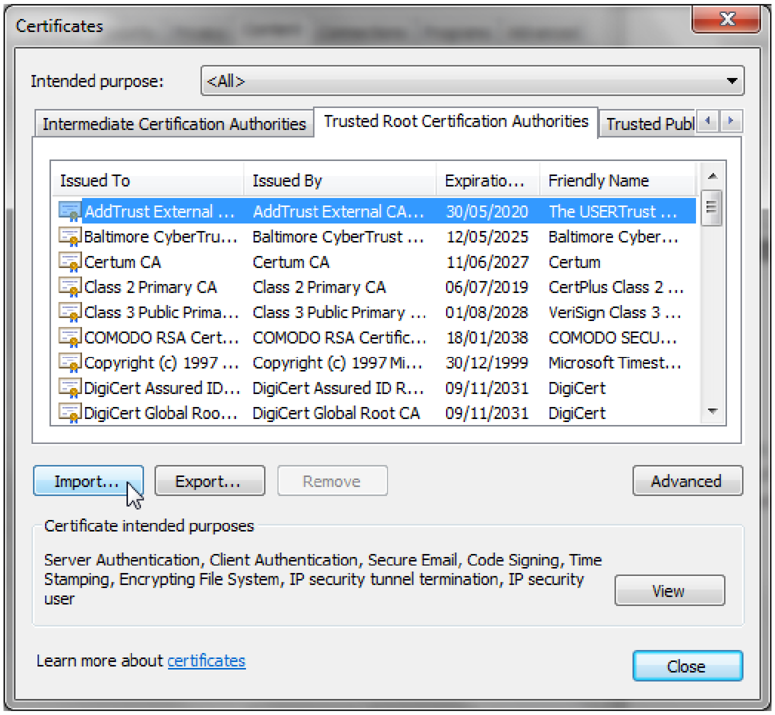
1. Open the Chrome browser.
2. In the top right corner of the browser window, click the Chrome menu icon (≡).
3. Click the **Settings** link.
   Result: The **Settings** tab appears.
4. At the bottom of the dialog box, click the **Show advanced settings** checkbox, and then scroll down to the **HTTPS/SSL**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

Figure 12. Chrome – Advanced Settings



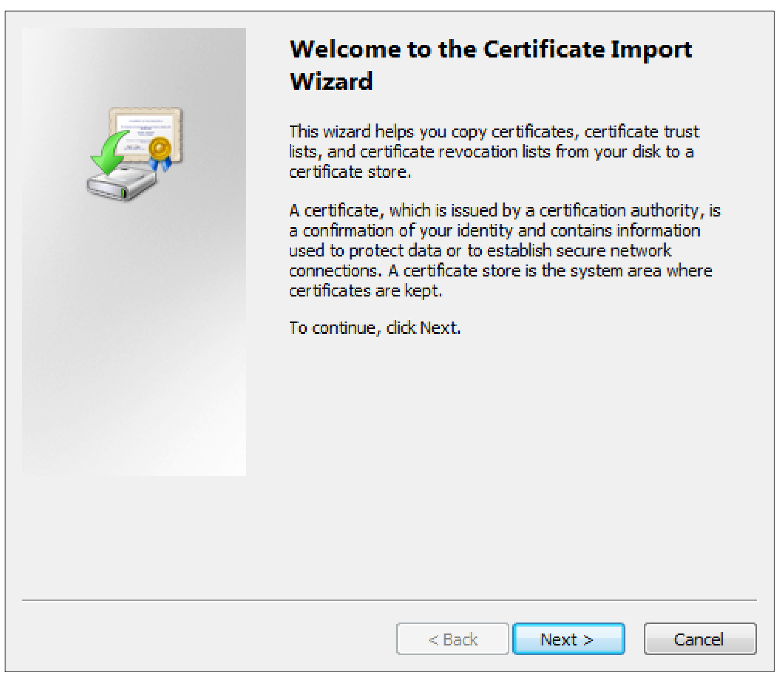
5. Click the **Manage certificates** button.
   Result: The **Certificates** dialog box appears.

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.

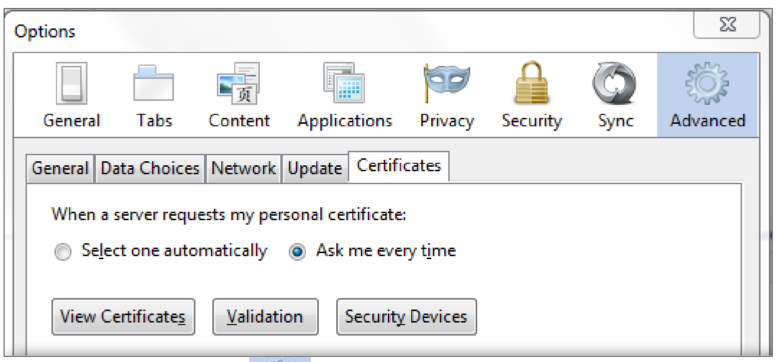
Add Certificate to Firefox Certificate Store

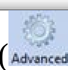
Mozilla Firefox has its own certificate store. Follow these steps to add the certificate to the Firefox Certificate store.
The following instructions apply to a Firefox browser (version 54) running on a Windows or Mac operating system (OS).

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.

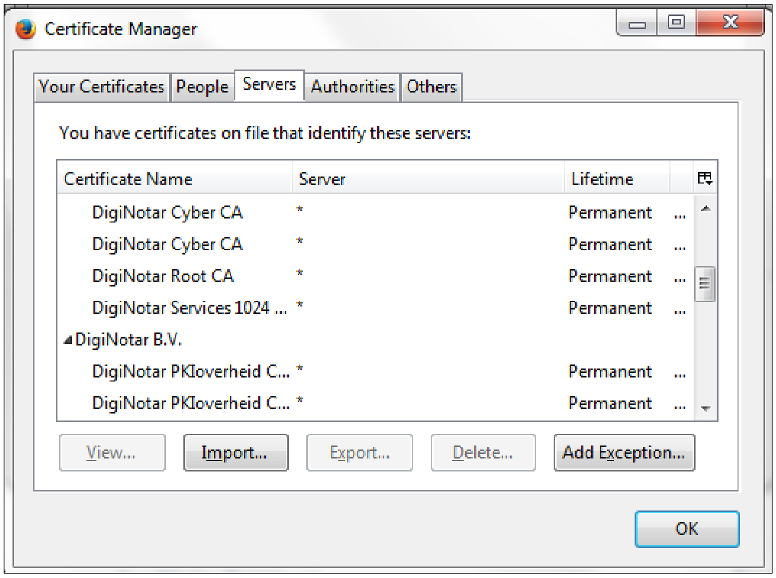
Figure 15. **Firefox – Options**



5. Click the **Advanced** icon (

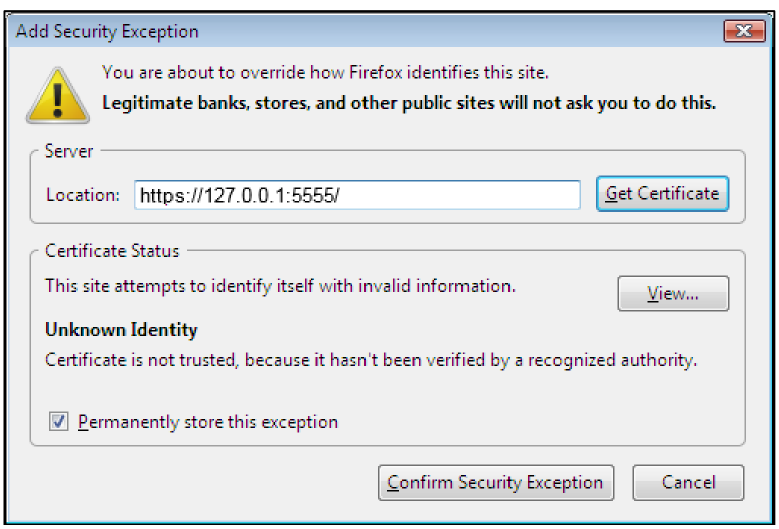
), and then click the **Certificates** tab.
6. Click the **View Certificates** button.
   Result: The **Certificate Manager** dialog box appears.

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:

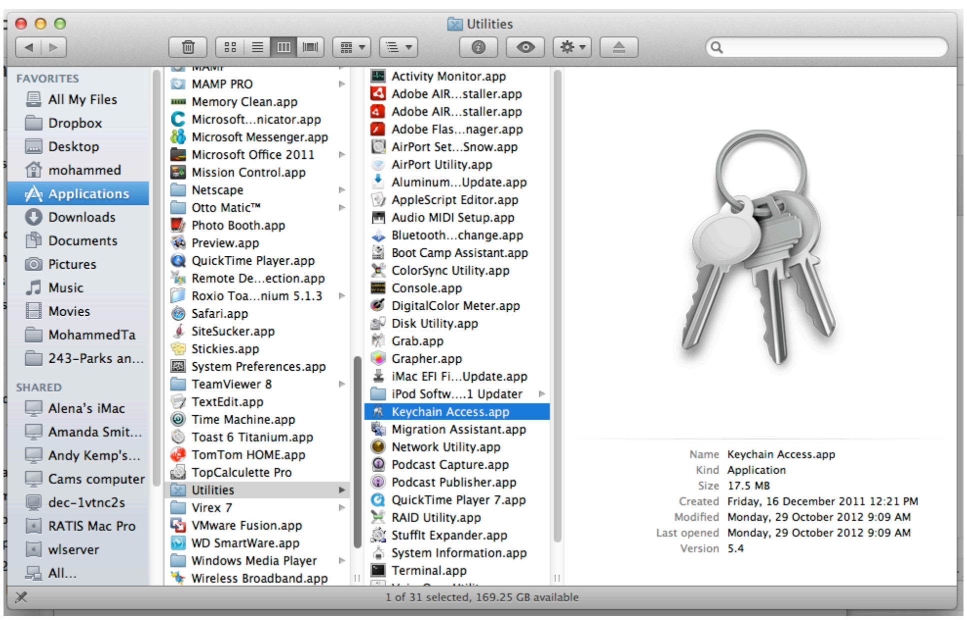
1. Sign in to the client with Firefox and launch the JNLP.
2. Open the Firefox Certificate Manager to the Servers tab, and click the Add Exception button.
3. Enter https://127.0.0.1:5555/ in the **Location** field.
4. Click the **Get Certificate** button.
5. Click the Permanently store this exception 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.

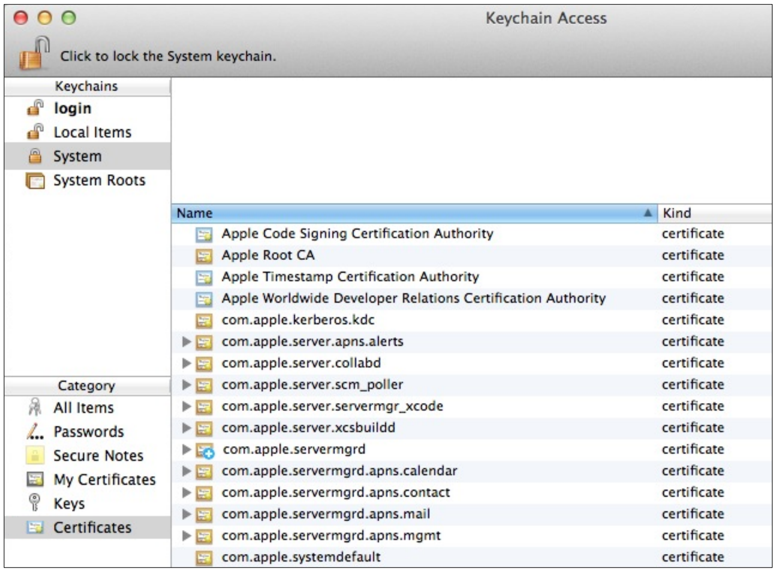
1. In the Dock, open **Finder**.

Figure 18. **Mac OS - Finder**



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

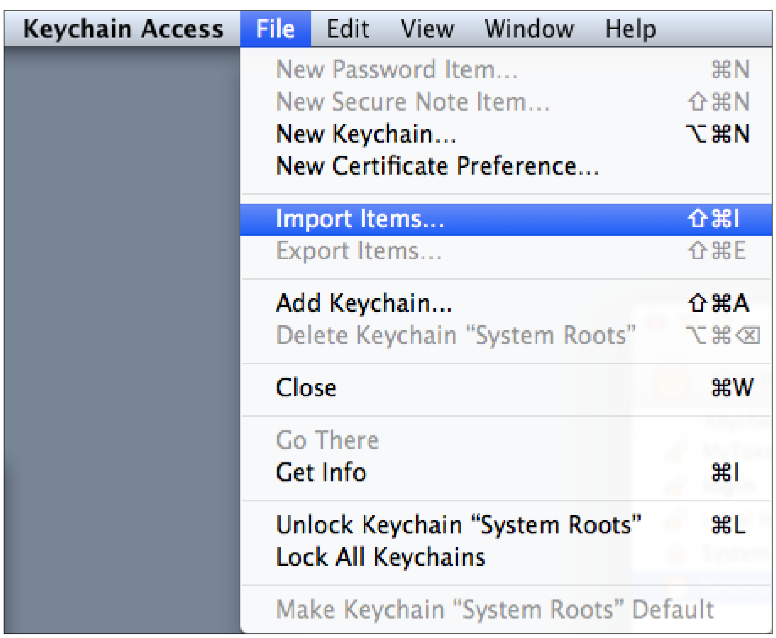
Figure 19. **Mac OS – Keychain Access Window (Fragment)**



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**

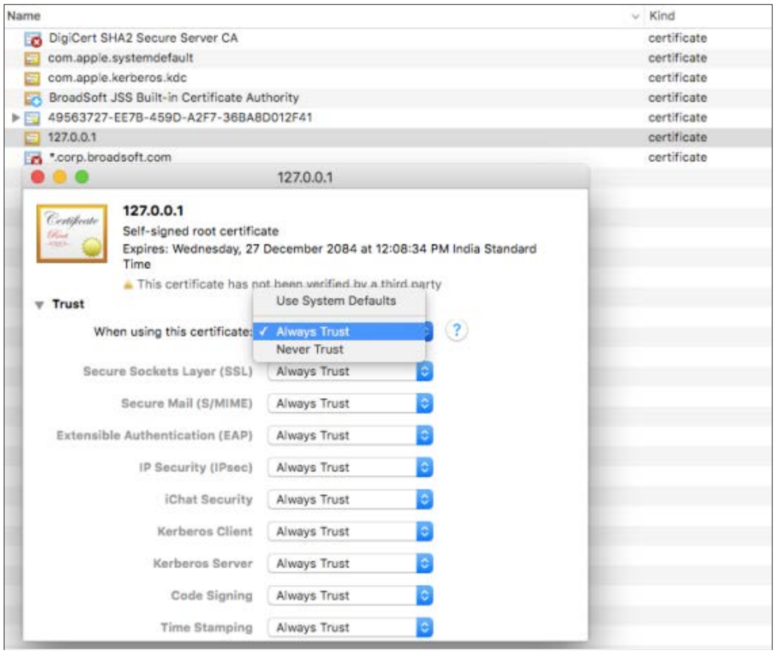


6. From the **Keychain Access** toolbar, click the **File** menu, and then click the **Import Items** option.

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.

Figure 21. **Certificate Window**



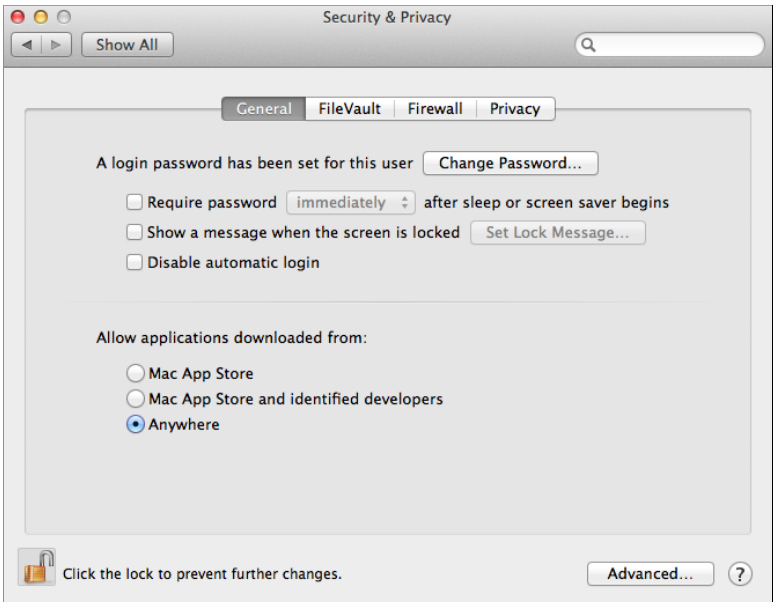
9. In the **Trust** section, select **Always Trust for When using this certificate**.
10. Click the X in the upper right corner to close the browser.

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.

Figure 22. **Mac OS X – Security & Privacy**



2. Click the lock icon ( ) 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		Click-To-Dial	Answer, End
Ringing In (Remote)	Incoming		Terminator	Answer, Conference, End
Ringing Out, Outgoing	Outgoing		Originator	Conference, End
Active	Active		Any	Transfer, Hold, 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		Conference	Resume, Transfer, End
Ringing In (Recalled Call)	Recalled		Terminator	Answer, Conference, End
Parked Call	Parked (<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 **Dialer**.
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. (**Note**: 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.
TXR Transfer	This transfers a call to a selected number or contact.
VM Transfer to Voice Mail	This transfers a call to the selected contact's voice mail.
ANS Answer	This answers an incoming call, answers an unanswered call for a contact, or resumes a held call.
HOLD Hold	This places a call on hold.
END End	This ends a call.
CONF Conference	This establishes a conference call or adds a call to a conference.
CAMP Camp	This camps the call on a busy contact.
BARGE Barge In	This barges in on a contact's call.
PARK Park	This parks a call on a contact.
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 Retrieve	This retrieves a selected call from the queue to the supervisor's device.
REORDER Reorder	This changes a selected call's position in the queue.

FAQ

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.