IPFX Live Desktop

Product version 4.3 SP5



About This Guide

Who This Guide Is For

This guide is for anyone who uses the IPFX Live Desktop product.

See Also	
About This Guide	
Phone limitations	
Typographical Conventions	
Getting Help	

Phone limitations

The IPFX system is designed to work best with Cisco 7940 and 7960 IP phones, and with IPFX Softphones.

Other phone types (for example, Cisco 7912 and 7905 phones, and ATA phones) have limitations that prevent them from being fully integrated with the IPFX client.

Any phone type that is not a Cisco 7940/60 or an IPFX Softphone will be unable to perform the following functions:

• Dialling directly from the Client.

(Instead, the user's phone will ring first, and must be answered before the outgoing call will proceed).

- Holding, Resuming, and Answering calls from a Client.
- Performing Supervised Transfers from the Client.

(Note that Cisco 7912 Phones are able to perform *blind* transfers from the Client, provided the **Do Not Allow Supervised Transfers** option is selected in the client).

See Also	
About This Guide	
Who This Guide Is For	
Typographical Conventions	
Getting Help	

Typographical Conventions

Before you start using this guide, it is important to understand the terms and typographical conventions used in the documentation.

The following kinds of formatting in the text identify special information.

Formatting convention	Type of Information	
Triangular Bullet(Ø)	Step-by-step procedures. You can follow these instructions to complete a specific task.	
Special Bold	Items you must select, such as menu options, command buttons, or items in a list.	
Emphasis	Use to emphasize the importance of a point or for variable expressions such as parameters.	
CAPITALS	Names of keys on the keyboard. for example, SHIFT, CTRL, or ALT.	
KEY+KEY	Key combinations for which the user must press and hold down one key and then press another, for example, CTRL+P, or ALT+F4.	
	Information that applies to the IPFX Director platform only.	
CCM	Information that applies to the IPFX for CallManager platform only.	
NEC V	Information that applies to the IPFX for NEC platform only.	
MOD	Information about an IPFX module. All, some, or no modules may be available to you, depending on which modules your organisation has purchased.	

See Also

About This Guide Who This Guide Is For Phone limitations Getting Help

Getting Help

Press F1 within any IPFX screen for online product help.

Log a call with our Helpdesk if you have questions or problems using an IPFX product.

IPFX Limited (previously known as Performance Solutions) ABN 85 083 372 696

Postal Address: PO Box 105 079, Auckland Central, New Zealand Website: http://www.ipfx.com

Sales/Channel Enquiries: sales@ipfx.com

New Zealand Help Desk email :support.nz@ipfx.com phone: (09) 357 1155

Australia Help Desk email : support.au@ipfx.com phone: 1300 737 367

United Kingdom Help Desk email: support.uk@ipfx.com phone: +44 845 609 0171

International Help Desk email: support@ipfx.com phone: +61 2 9779 3998

See Also

About This Guide

Who This Guide Is For

Phone limitations

Typographical Conventions

What is IPFX Live Desktop?

IPFX Live Desktop is a powerful, easy to use configuration utility, designed to allow you to operate all facets of your personal voicemail mailbox.

IPFX Live Desktop covers all your voicemail mailbox functions from the common everyday tasks, such as listening to your messages, right through to the more advanced features of setting your **Location** (see "" on page 57) and allowing you to view other internal extensions.

Before You Begin

Before you use this IPFX product, we recommend you set up your voicemail mailbox via your telephone. To do this:

- 1. Dial your voicemail mailbox number (check with your Network Administrator if you do not know the number)
- 2. Enter a new Password (PIN number) followed by the *#* key.

Passwords should:

- be 4-15 digits in length
- not start with 0
- be a number you will easily remember
- be a number that only you know
- 3. Press # again to confirm your Password or re-enter a new one
- 4. Record your full name after the tone. At the end of your recording press #

Example: John Smith #

Note: Your name may have already been recorded for you. If so, skip to step 7

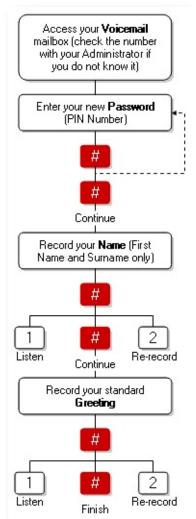
5. Press 1 to Listen to your name; or

Press 2 to Re-record

- 6. Press # to Continue (when satisfied with the name recording)
- 7. Record your standard greeting (after the tone)

Example: "Hi, this is John, sorry I'm currently unavailable. Please leave me a message and I will return your call as soon as I can. Or press 0 to transfer back to the operator"

- 8. At the end of your recording, press #
- Press 1 to Listen to your greeting; or Press 2 to Re-record



10. Press # to Finish and Hang Up (when satisfied with your greeting)

For information about using voicemail via the phone itself, refer to the separate *IPFX Voicemail (Phone only) User Guide*.

Phone Forwarding (NEC Only)

Please do the following action to activate Phone Forwarding:

- 1. Lift Handset
- 2. (
- 3. Replace Handset

How to Start

Depending on your PC configuration, IPFX Live Desktop can be launched from three different locations:

Location	Action
	Double-click the IPFX Live Desktop shortcut on your PC's Desktop, i.e.
Desktop shortcut	Note You will need to minimize all other screens to see the Desktop
Start Programs	Click the Start button (bottom left of your PC screen) and select Programs > IPFX > IPFX Live Desktop
Start IPFX Live Desktop	Click the Start button and, if you have an IPFX Live Desktop shortcut showing above Programs, click to launch it

Security Warning - Windows XP SP2

If Windows XP Service Pack 2 is installed on your PC, the following **Security Alert** screen will appear upon installing the IPFX product for the first time:



To use your IPFX product, you must:

- Select Unblock this program.
- Click OK.

See Also

How to Start

Password Verification

Password Verification

When the IPFX product loads, you will be prompted to enter a Password (PIN number).

- Check that extension number shown in the Password Verification dialog box matches the extension number of your phone. If the extension numbers are different, change the number in the box's Extension: field so that the numbers match.
- 2. Enter the voicemail mailbox password that you have <u>previously set</u> <u>up</u> on your phone and click **OK**.

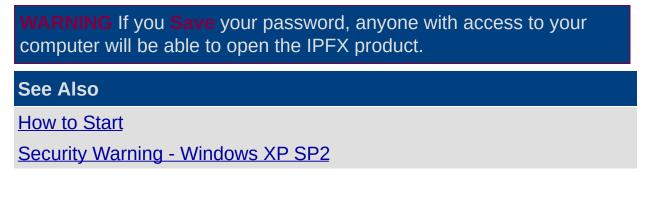
Password Verification	×
Please enter an extensi password that is valid.	on number and
Extension: 418 Password:	
Save Password	
<u>QK</u> <u>C</u>	ancel

To bypass the password prompt each time you open the IPFX product:

Tick the **Save Password** checkbox. You will no longer be prompted for a password.

To change your saved Password:

Click on the CTI Options button and select the Change Password button from the General tab.



How to Use

IPFX Phone Control Toolbar

Move your mouse to the top middle of your screen. The IPFX Phone Control Toolbar will appear:

This Feature	Does This
Location	Gives you complete control over how your calls are handled in different situations and informs callers and staff where you are and when you expect to return. More
Voicemail	Enables you to listen, reply, delete or save the voicemail messages without having to pick up your phone (depending on your phone type). You can tell at a glance whether you have new voicemail messages by the colour of the Voicemail icon on the toolbar. <u>More</u>
Send	Allows you to record and send a message to as many internal mailboxes as you require simultaneously. This also enables simultaneous send to SMS and Email. More
Directory	Shows all the internal extensions you can view, call, transfer to or hangup from. Also provides a view for Company Directory. <u>More</u>
Queues	A queue is an extension on the PABX, which directs incoming calls to the queue agents in a Call and Contact Centre environment. <u>More</u>
Dial	Gives you the ability to control your telephone from your PC. For headset users, this is a convenient way of handling your phone calls without taking your eyes from your screen. More
Work Time	Allows an agent in a Call and Contact Centre to schedule some time after hanging up to complete the call's requirements or documentation, before receiving another queue call. <u>More</u>
Contact	Allows you to create contacts to provide onscreen caller identification, quick key calling and general information. More
Record	Allows you to record a current conversation and save it for future reference or use. More
Reports	Provides comprehensive and flexible reporting on all telephony and IPFX Contact Centre activities. IPFX Call Centre Express Reports are also available. <u>More</u>
Options	Allows you to change user settings [you must right-click on the Toolbar to make the button visible]. <u>More</u>

In This Section	
Using locations	
<u>Voicemail</u>	
Send a message	

Directory

<u>Queues</u>

See Also

How to Use

IPFX Telephony Group

<u>Dial</u>
Work Time
<u>Contact</u>
Record
Reports

Options

<u>Shortcuts</u> <u>Main Window</u>

System Tray

Using locations

In This Section	See Also
In This Section	IPFX Phone Control
What are locations?	Toolbar
Setting your location in	<u>Voicemail</u>
IPFX Live Desktop	<u>Send a message</u>
Returning from a location	Directory
Setting another extension's location	Queues
Entering Operator	Dial
Instructions	Work Time
Editing your Location	<u>Contact</u>
settings in Live Desktop	Record
Changing your extension's properties	<u>Reports</u>
properties	<u>Options</u>

What are locations?

The IPFX system allows you to place yourself at one of up to 10 *locations*. Locations describe your current availability: "in the office", "in a meeting", "gone out" and "on sick leave" are all examples of locations that you can choose to describe your whereabouts.

The IPFX system will inform colleagues and callers of your current location and, in most cases, of your expected return time.

By setting your location, you also tell the phone system how you want to handle incoming calls while you're away from your desk. For example: if you have "gone out", you might want to immediately divert callers to your mobile phone; if you are "in a meeting", you may prefer to have callers leave you a voicemail message instead; if you are "on sick leave", your voice mail system might invite callers to leave a message, but also give them the option of diverting to your home number for urgent matters. These are just examples the settings for each location are entirely configurable.

	See Also
	Using locations
	Setting your location in IPFX Live Desktop
	Returning from a location
In This Section Locations and default return times	Setting another extension's
	location
	Entering Operator
	Instructions
	Editing your Location
	settings in Live Desktop
	Changing your extension's
	properties

Locations and default return times

Location	Default return time
Queue (Yellow phone) Note: The Queue location is only available if the Call and Contact Centre module has been purchased.	N/A. You will generally remain logged into your queue until you manually set yourself to a different location.
	N/A. Office is the default location: you are at your desk. Your location will remain in the "Office" state until you manually set yourself to a different location.
Office (White phone)	However, the system will assume that you have left your desk or are otherwise occupied if you do not use your keyboard or mouse for a while - 5 minutes by default. While the system believes that you are away from your desk, people viewing your location information will see a small clock
	superimposed over the white phone icon. Moving your mouse or using your keyboard will immediately return your location to the normal Office status.
鑙 In A Meeting	1 hour
bo Not Disturb or Prime Time	1 hour Note: The Prime Time module must be purchased separately.
Gone Out	1 hour
6 Gone For Day	Beginning of business, the next day.
🟂 On Leave	Beginning of business, the next day.
Sick Leave	Beginning of business, the next day.
Dn A Break	15 minutes.
Away On Business	Beginning of business, the next day.

Away On Business

Break Codes: declaring a specific type of break

On some systems, you may be able to set your location to a specific type of break using the On a Break location button. For example, you may be able to set your location to a lunch break, or a coffee break. The **On a Break** location may even be used to indicate other absences from your desk: you might be attending a fax machine, or collecting company mail from the post office. These specific types of break are called break codes.

You can tell whether break codes are available on your system by examining the **On a Break** icon in your Location screen. If your **On a Break** icon has a drop-down menu arrow on the right side of the icon, then your system supports break codes.



If you do not see a drop-down arrow on your button, then break codes have not been enabled for your system.

To set your location using a break code, click the arrow beside the On a Break button and select your break code from the drop-down menu:



Note: Your IPFX Administrator can add and edit break codes.

Setting your location in IPFX Live Desktop

To set or change your location, open the **Location screen** by clicking on the **Location** button on the top toolbar.

😼 IPFX Live Desktop - [Ex	ctension 302]		
🚉 . 🖂 🙋		27. 👰 . 🖽	
Location Voice Mail Send	Directory Queues	Dial Work Time Contac	t Record Reports
General			
l 🔯			
Directory			
*			
Operator Operator (0)			
		30/06/06	13:32

See Also

Using locations

What are locations?

Returning from a location

Setting another extension's location

Entering Operator Instructions

Editing your Location settings in Live Desktop

Changing your extension's properties

In This Section

Setting your location using <u>a menu shortcut</u>

Setting your location using a menu shortcut

Instead of opening the Location screen, you can set your location directly from the IPFX Live Desktop toolbar.

Note: If you set your location using this method, you will not be able to specify a return time. IPFX Live Desktop will assume the <u>default return</u> time for your location.

To change your Location using the menu shortcut

1. Click on the drop-down arrow beside the **Location** icon on the IPFX Live Desktop's toolbar.

The Location shortcut menu will appear:

🐱 IPFX Live Desktop - [E:	ktension 302]	
🖀 , 🖂 🙀	💐 🞁 🖀. 🝥 . 🛙	
Location Voice Mail Send	Directory Queues Dial Work Time Co	ontact Record Reports
⁰ - Queue ¹ - Office ² - In A Meeting ² - Prime Time ⁴ - Gone Out ⁵ - Gone For Day		
 6 - On Holiday 7 - Sick Leave 8 - On A Break 9 - Away On Business Other 	30/06/06	10:35

2. Select your new location.



Returning from a location

Most locations expire after a certain amount of time - the Office and Queue locations are the obvious exceptions.

You can choose how your IPFX client deals with an expired location. The client has two possible settings:

 Manual return (the default). When configured for manual return, the client will display a Location Expired window when your location expires:

Would you like to set a new location now?
Office Queue Other Later

Your location will remain at the 'expired' location until you select one of the following options:

- Click the Office or Queue buttons to set your location to Office or Queue respectively.
- Click the **Other** button to set yourself to any other location.
- Select a number of minutes from the drop-down menu and click
 Later to postpone your return for the allotted time.
- Automatic return. Alternatively, your IPFX client can automatically set your location to Office when a location expires. To turn on Automatic Return, open the CTI Options screen and check the Auto Return Location checkbox in the Popups tab.

See Also

Using locations

What are locations?

Setting your location in IPFX Live Desktop

Setting another extension's location

Entering Operator Instructions

Editing your Location settings in Live Desktop

Changing your extension's properties

Setting another extension's location

In addition to being able to set your own location, you can set or change the locations of your colleagues.

	See Also
In This Section	Using locations
Changing another extension's Location - Directory Changing another extension's Location -	What are locations?Setting your location in IPFX Live DesktopReturning from a location Entering Operator
Sidebar Setting a location for multiple extensions	Instructions Editing your Location settings in Live Desktop
	Changing your extension's properties

Changing another extension's Location - Directory

To change the Location of another extension using the Directory:

1. Click on the **Directory** button on the top toolbar.

Market PFX Live Desktop - [Extension 303]	
🖀 . 🖂 🙀 💐 🛍 🖀 . 🍥 . 🚍 🖻 🔛	
Location Voice Mail Send Directory SQueues Dial Work Time Contact Record Reports	
General	
Directory	
Operator Operator (0)	
30/06/06 16:54	

2. The Directory will appear:

IPFX Live Desktop -	<u>,</u> 🕅) T.	Vork Time Contac	t Record Reports	
General	Exter	nsions	[Techwrit	te01]		
	Exte	ensi Title	First Name	Last Name	Department	Location
~	a 0		Operator	Operator		Queue
Directory	77 301	Ms	Fayola	Lawal	Management	Office
	🦻 🖁 302	Ms	Aynslie	Gill	Customer Service	Away On Busine
	😤 303	Mr	Chu	Sau-Tung	Administration	Queue
11	204	Ms	Tayanita	Creek	Sales and Marketing	Office
Operator Operator (0)	🔨 305	Mr	Koorong	Jones	Finance	On Holiday
	靋 306	Ms	Noor	Hafeez	Research and Deve	Office
	207	Mr	Torometi Tuki	Para	Customer Service	Queue
	•					► I
	Perso	onal D	irectory 🖕			
	Dial Faile	с d [-21472;	20491]	30/	06/06 17:0	

3. Right-click on the extension you want to change. A short cut menu will appear:

IPFX Live Desktop -	Extension	303] (96	2					
🍊 - 🖂 🖕		ա		Ø	•	토륀		
ocation Voice Mail Ser		- 2023		Vork Time	(Contact	Record Reports	
General	and the second se		[Techwri					
	Extensi	Title		Last	Nar	me	Department	Location
_6	🖀 O		Operator	Operator				Queue
Directory	301		Fayola	Lawal			Management	Office
	7 302		Aynslie	Gill			Customer Service	Away On Busine
<u> </u>	😤 303 🕋 304		Chu Tayanita	Sau-Tung Creek)		Administration Sales and Marketir	Queue
<u>(#)</u>	304 305 305 305 305 305 305 305 305 305 305		Koorong	Jones -			Sales and Markeur	ng Onice
Operator Operator (0)	······································		Noor	Hafeez		Set Loca	ition	Office
	307	Mr	Torometi Tuki	Para		Call Con	trol V	Queue
	•					Set Callb		•
	Person	al Di	irectory _			Dial Asso		
		•				Dial Mob		
	Dial Failed [-:	214722	20491]	_		Dial Hom		11
						Email		
						Insight		
							Conferences	
						Chat		
						SMS		
						View Pict	ture	
					5		se Printout	
					_	_		
					.	Propertie	es	

4. Click Set Location...

The Location screen will appear:

* *	8	<u>)</u> -	4	(5	2		2		•	Z	2	9		
Time		•		Mar	ch 2	006			Ĭ		Ар	ril 20	06		Þ
8:00 AM 8:15 AM		Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
8:30 AM		27	28	1	2	3	4	5	1					1	2
8:45 AM	_	6	7	8	9	10	11	12	3	4	5	6	7	8	9
9:00 AM	_	13	14	15	16	17	18	19	10	11	12	ര	Ð	15	16
9:15 AM 9:30 AM		20	21	22	23	24	25	26	17	18	19	20	21	22	23
9:30 AM 9:45 AM		27	28	29	30	31			24	25	26	27	28	29	30
10:00 AM									1	2	3	4	5	6	7
10:15 AM	~														
iick Leave till Frida Dperator Instru		ł, 200	16 at	8:30	AM									Cle	ear
															201

- 5. Click on a location button to set a new location for this extension.
- 6. Click **OK** to save the new location.

See Also Setting another extension's location Changing another extension's Location - Sidebar Setting a location for multiple extensions

Changing another extension's Location - Sidebar

To change another extension's Location using the sidebar

1. Locate the extension's icon in the Sidebar, at the left of the Live Desktop window:

😼 IPFX	Live Deskto	op - [Ex	ctension	302]						
P	. 🖂	1 I	I	(j)	2.		. Ee	F		B
Location	Voice Mail	Send	Directory	Queues	Dial	Work Time	Contact	Record	Reports	Configuration
	General									
	A									
Ayns	ilie Gill (302)									
	2									
Kooror	ng Jones (305))								
		-								
							06/07	7/06	10:2	8 //

2. Right-click on the extension's icon, and select of the extension you want to change. The shortcut menu will appear:

🔏 IPFX Live 🛛	esktop - [E	xtension	302]							×
A	A 🕅		(î î î	æ.		-	F		5	
Location Void	e Mail Send	Directory	Queues	Dial	Work Time	Contact	Record		Configuration	
Genera P Aynslie Gill (Koorong Jone		n De								
	Dial Dial Associa Dial Mobile					06/07	7/06	10:3	17	
-	Dial Home Hangup			_	_	10070	,700	10.5	1	
	Remove fro	m Sidebar								

3. Click Set Location.

The Location screen will appear:

🖀 🖀 😤 i	°.	Ø	0	5	Ő		2		•	H	> (9	ď	
Time	•		Mar	ch 2	006			0		Ap	ril 20	06		•
8:00 AM 8:15 AM 8:30 AM	<u>Mon</u> 27	Tue 28	Wed	Thu 2	Fri 3	Sat 4	Sun 5	Mon	Tue	Wed	Thu	Fri	Sat 1	Sun 2
8:45 AM 9:00 AM 9:15 AM 9:30 AM 9:45 AM 10:00 AM 10:15 AM	6 13 20 27	7 14 21 28	8 15 22 29	9 16 23 30	10 17 24 31	11 18 25	12 19 26	3 10 17 24 1	4 11 18 25 2	5 12 19 26 3	6 20 27 4	7 21 28 5	8 15 22 29 6	9 16 23 30 7
ck Leave till Friday April : perator Instructions)6 at	8:30	AM										ear
														<
										<u>о</u> к	1	ç	ance	<u>ک</u>

4. Click on a location button to set a new location for this extension.

Click **OK** to save the new location.



Setting a location for multiple extensions

You can set multiple extensions to the same location using the Directory.

- 1. Hold down the CTRL key and click on the extensions whose locations you wish to change.
- 2. Right click on selection to display the shortcut menu:

	Exten∞i		🛍 View Qua Title	eues 🔻 🔚 First Name	Bial ▼ ∉ Last Name) i≡ F≡ S Department	Location	Return Time	Regio
-	0			perator	Operator		vepariment	Office	neturi Time	Local
_	301	Ms		ayola	Lawal			Office		Local
	302	Ms		ynslie	Gill				08:30 am Sunday,	
	303	Mr		hu	Sau-Tung	and and and		Office		Local
	304	Ms	T	ayanita	Creek		Cablera Kar			Local
	305	Mr	K	oorong	Jones		Set Location			Local
	306	Ms	N	loor	Hafeez		Call Control	° ►		Local
	307	Mr	Т	orometi Tuki	Para		Dial <u>A</u> ssociate			Local
							Dial Mo <u>b</u> ile			
					_		Dial <u>H</u> ome/Oth	er 🗖		
					_		Email			
							Insight			
							- <u>M</u> eetme Confe	rences		
							— Chat			
							View Picture			
							Customise <u>P</u> rin			
							Print Pre <u>v</u> iew			

3. Select Set Location...

The Location screen belonging to one of the selected extensions will display:

<u>7</u> 2	<u>انا المعام ا</u>	j-	Ø	0	5	Ő	5	}	đ	-	H	> (9	ľ	
Time 11:00 AM	~	•		Mar	ch 2	006					Ар	ril 20	06		Þ
11:15 AM		Mon		Wed					Mon	Tue	Wed	Thu	Fri	Sat	
11:30 AM 11:45 AM		27	28	1	2	3	4	5	~		-	,	7	1	2
2:00 PM		6	7 14	8 15	9 16	10 17	11 18	12 19	3 10	4	5 12	6 13	7 14	8 15	9 16
L2:15 PM L2:30 PM		20	21	22	23	24		26		<u>78</u>		20	21	22	23
12:45 PM		27	28	29	30	31			24	25	26	27	28	29	30
1:00 PM 1:15 PM	~								1	2	3	4	5	6	7
n A Meeting till Tu	iesday Ap	oril 18	, 200)6 at	11:30) AM									
)perator Instru	ictions													Cle	ear
															~
															V
											<u>о</u> к	1		ance	

- 4. Click a location button to set a new location for the selected extensions.
- 5. Click OK.

The Set Multiple Locations screen appears:



6. Click Yes.

All the selected extensions will now show the new location.



Changing another extension's Location - Sidebar

Entering Operator Instructions

You can enter and edit Operator Instructions for your own extension, or for any extension in the Directory:

- 1. Open the <u>Location screen</u> for the extension whose Operator Instructions you wish to modify.
- 2. Click inside the white text box below the words Operator Instructions and type in your message:

Location - Aynslie Gill (302)															
🖀 🖀 🗳 🏹 🖉 🌜 🐔 🆫 👘 🖓 🎕 🛍															
Time 8:00 AM	March 2006						April 2006 📃								
8:15 AM 8:30 AM		ue Wed	Thu 2	Fri 3	Sat 4	Sun 5	Mon	Tue	Wed	Thu	Fri	Sat	Sun 2		
8:45 AM 9:00 AM 9:15 AM 9:30 AM 9:45 AM 10:00 AM 10:15 AM	6 13 1 20 2	7 8 14 15 21 22 28 29	9 16 23 30	10 17 24 31	11 18 25	12 19 26	3 10 17 24 1	4 11 25 2	5 12 19 26 3	6 13 20 27 4	7 14 21 28 5	8 15 22 29 6	9 16 23 (1) 7		
Away On Business till Sunday April 30, 2006 at 8:30 AM Operator Instructions Clear															
Meeting VIP clients in Singapore - direct enquiries about the K45 account to Fayola.															
<u></u> Cancel															

Click OK.



Changing your extension's properties

Editing your Location settings in Live Desktop

Location settings enable you to control how the IPFX system handles incoming calls.

To access your Location Settings, click on the Location icon on your toolbar.

To edit your location settings:

1. Start from your location screen:

Location - 301														
🖀 🐨 😵 🤺	j-	ł	C	5	Ø	5	2	0	•	A		0		
Time Unknown 12:15 AM	4		Mar	ch 2	006					Ap	il 20	106		•
12:30 AM 12:45 AM 1:00 AM 1:15 AM 1:30 AM 1:45 AM 2:00 AM 2:15 AM	27 6 13 20 27	28 7 14 21 28	1 8 15 22 29	2 9 16 23 30	3 10 17 24 31	4 11 18 25	5 12 19 26	3 10 17 24 1	4 11 18 25 2	5 19 26 3	6 13 20 27 4	7 14 21 28 5	1 8 15 22 29 6	2 9 16 23 30 7
Office Operator Instructions														ar
										<u>o</u> k		<u></u>	ance	2

- 3. The Location Settings screen appears:

Oiversion After Busy or No Answ Immediately Divert To: Voice Mail	ver T	Normal Messages function No Notification Urgent Messages enable	Message waiting lights on independently of your ation settings. If rted by your PABX you can e or disable this feature Preference Settings from
Greetings Standard Office Busy Name Caller Transfer Keys Operator Operator Associate Mobile Phone Home/Other Pager Service	Record Record Record Record		in Menu.

Each location can be configured separately. Click the location tabs at the top of the Locations Setting screen to change your settings for different locations.

The Location Settings options are described below.

Diversion

Incoming calls to your extension can be diverted to a new destination while you are at the selected location.



• If you can usually answer calls to your extension at the selected

location - the "Office" location, for example - you will probably choose to divert calls **After Busy or No Answer**. The system will attempt to deliver incoming calls to your extension, and will only divert if you are unable to take the call.

- If you do not expect to be able to answer calls to your extension from the selected location, choose to divert calls Immediately. Calls will be instantly diverted; your extension will not ring.
- Click on the **Divert To** combo box and select a destination for the diverted calls:
 - Voice Mail diverts calls to the IPFX Voice Mail system, where callers may leave you Voice Mail messages, or attempt to contact you using *Caller Transfer Keys* (see below).
 - **Operator** diverts calls to the operator.
 - Associate diverts calls to the extension you have set as your Associate.
 - Mobile Phone diverts calls to the number that you have set as your mobile phone.
 - Home/Other diverts calls to the number that your have set as your Home/Other number.
 - Pager Service diverts calls to the number that you have set as you Pager Phone number.

Note: If your company policy forbids off-site transfers, you will only be able to divert your calls to **Voice Mail**, **Operator**, or **Associate**.

Greetings

Greetings are recorded messages that the system plays to callers when they reach your Voice Mail.

The IPFX system allows you to record a number of different greetings:

 A generic Standard greeting. "Hi. I'm sorry I can't take your call right now..."

You will have recorded your **Standard** greeting when you first set up your Voice Mail mailbox.

Callers will receive your **Standard** greeting if you have not recorded (or you choose not to use) location-specific greetings.

• A Busy greeting. "I'm sorry, I'm on another call at the moment..."

The **Busy** greeting is played if your extension is off-hook and the **Inform Caller of Busy/No Answer** checkbox is selected in your <u>Properties/Options tab</u>. If you have no **Busy** greeting recorded, your **Standard** greeting will be used in its place.

 Several location-specific greetings. "I'm sorry, I'm currently in a meeting", "I'm sorry, you've called while I'm on sick leave...", etc.

For each location, you can choose whether the caller hears your **Standard** or location-specific greeting.

 A Name greeting. The Name greeting simply states your name, and will have been recorded when you first set up your Voice Mail mailbox.

Greetings				
Standard	Record			
C Office	Record			
Busy	Record			
Name	Record			

To hear, record, or delete your location-specific greetings, click on the tab of the location associated with the greeting and click the **Record** button beside the greeting you wish to hear or modify. Your phone will ring, and a voice prompt will guide you through the process of listening to or recording your greeting.

Note: After recording your greeting, press the # (hash) key on your phone. This ensures that no gaps are left between your greeting and the beep that prompts a customer to record their message.

Caller Transfer Keys

You may wish to provide callers with alternative means of reaching you, should they reach your Voice Mail. *Caller Transfer Keys* enable callers themselves to transfer their call to range of pre-set destinations.

Callers can always reach the operator by pressing 0 from within your Voice Mail. For each location, you may assign other transfer destinations to the keys 1-4.

If your company policy forbids off-site transfers, you will only be able set your Caller Transfer keys to internal extensions (i.e. Another Extension and Associate). Otherwise, the full range of destinations will be available

to you:

)	Operator
1	Associate
2	Mobile Phone
3	Home/Other
4	Pager Service
	No Transfer Another Extension Associate Mobile Phone Home/Other
	Pager Service

- No Transfer disables the selected Caller Transfer Key for this location.
- Another Extension the caller will prompted to enter an extension number and will be transferred to that extension.
- Associate transfers the call to the extension that you have set as your Associate.
- **Mobile Phone** transfers the call to the extension that you have set as your Mobile Phone.
- Home/Other transfers the call to the number that you have set as your Home/Other number.
- Pager Service transfers the call to the number that you have set as your Pager Phone number.

Click on the drop-down menus to assign destinations to the Caller Transfer Keys. You must set the keys for each location separately.

The existence of Caller Transfer keys is not announced to the caller unless you yourself mention them in your recorded greeting. You are encouraged describe any the Caller Transfer options in your greetings if you wish callers to make use of them. For example: "*I'm sorry but I'm away on sick leave. Please leave a message after the tone. Or, if you are enquiring about a marketing issue press 1 to speak to our Marketing Manager, Tayanita Creek. For urgent matters, press 2 to contact me on my mobile phone, or 3 to reach me on my home number...*"

Notifications of new Messages

Notifications are used to alert you (or a colleague) to the fact that a caller has left a message in your Voice Mail mailbox. Notifications function independently of the Message Waiting Light on your phone.

You can choose how (or whether) notifications are sent.

Notifications for each location are configured separately: you might choose to receive message notifications on your mobile phone when you are "away on business", to have notifications sent to an Associate when you are "on holiday", and not to receive notifications at all while you are "in the office", for example.

Click in the **Normal Messages** drop-down box to select how you will be alerted to new Voice Mail messages of Normal priority:

Notifications Normal Messages	
No Notification	-
No Notification	
Ring Office	
Ring Associate	
Ring Mobile Phone	
Ring Home/Other	
Ring Pager	
Search List	

- No Notification you will not be notified of new, Normal priority, Voice Mail messages.
- **Ring Office** the IPFX system will call your office extension to announce the message.
- **Ring Associate** the IPFX system will call the extension that you have set as your Associate to announce the message.
- **Ring Mobile Phone** the IPFX system will call the number that you have set as your Mobile Phone to announce the message.
- **Ring Home/Other** the IPFX system will call the number that you have set as your Home/Other number to announce the message.
- Ring Pager the IPFX system will send a message to the number that you have set as your Pager Phone number to notify you of the new message.
- Search List you may provide a list of numbers, and the IPFX system will attempt to call each number in turn until it is able to deliver the message.

If you have selected any Notification type (other than the default **No Notification**), the IPFX System will attempt to call the selected destination in order to deliver newly-received Voice Mail messages. If the call is not answered within 3 rings, the IPFX system will hang up and try again every fifteen minutes until the Voice Mail message has been delivered, or until one hour passes. If the message remains undelivered after the first hour, the IPFX system will keep attempting to deliver the call once per hour thereafter. The person who answers the notification call will be prompted to enter your Voice Mail password. When the password is entered, the IPFX system will play the newly-received Voice Mail message.

Notifications for Urgent Voice Mail messages can be set to follow the same rules as for Normal message (**Same as Normal**), or can be set independently.

Notifications can be restricted to specific times and days:

C All Hours	
C Business Hous C Loaton ♥ Monday ♥ Toesday ♥ Wechesday ♥ Toursday ♥ Thursday ♥ Saturday ♥ Saturday ♥ Saturday	12:00 AM V Midnight V
in 2003h	
All Hours	(24 hours a day, 7 days a week)
	8.00am to 5.30pm Monday to Friday
Business Hours	These can be changed to suit your business. You can also select your business hours to adhere to the local time zone or the CTServer timezone, eg: Main Server is in Sydney, but your local time zone is in New Zealand - this affects your location return times.
Custom Hours	Actual days/times you want to be notified.
Server Times	Notification times are based on the CTServer time which will be dependant on your region settings as denoted in the Caution Note. For more information on Server settings, please see your Administrator.
	See Also
	Using locations
	What are locations?
	Setting your location in

In This SectionSetting your location in
IPFX Live DesktopPrime Time TabReturning from a location
Setting another extension's
location

Entering Operator Instructions

Changing your extension's properties

Prime Time Tab

Note: This feature only available if an IPFX Productivity Max (Primetime, Insight etc) module is purchased.

The Prime Time location allows much greater control over incoming calls than other locations.

While your location is set to Prime Time, you can choose to handle incoming calls in the any of the following ways:

- have all calls go directly to voicemail mailbox; or
- have calls ring your extension or go to voicemail based on the caller's identity or membership in a pre-defined group; or
- allow urgent calls to ring your phone, and have non-urgent calls go to voicemail; or
- have all calls divert to voicemail, but allow selected callers the option of transferring their call to your extension.

In order to take full advantage of this feature, you should create specific groups of callers into levels of priority. Then checking/unchecking them as required is very quick and efficient.

You can also edit and delete existing contact groups as required.

In a world that provides every mechanism for contact this first to the market feature allows users to strategically manage their time and achieve their workload.

Please refer to Location Settings' **Changing Location Settings**, but note that for Prime Time the changes in your screen and functionality are as follows.

The screen below shows the Location Settings Screen with the Prime Time feature displayed:

rime Time Caller Treatments Never Urgent Always Sync Out Of Office Never rings your extension Settings Play Own Greeting Record Urgent Notification Priority: 6 Contact Groups All Calls My Extensions Create Delete Edit Caller Transfer Keys 0 Operator • For Urgent 1 Mobile Phone 2 Home/Other 3 No Transfer 4 No Transfer	Urgent Messages	 Note: Message waiting lights function independently of your notification settings. If supported by your PABX you car enable or disable this feature using Preference Settings from the Main Menu. Times From 8:00 AM T To 5:30 PM T
--	-----------------	---

The screens below show the views when Never, Urgent, or Always tabs are selected.

Note: If you select a Contact Group on one of the three tabs, Never, Urgent, Always, this will clear that group from the other two tabs. A Contact Group or All Calls can only belong to one tab selection at a time.

Never tab

Select **Never** to send all calls direct to your Voicemail. (i.e. You do not wish to receive any calls.) Callers would get a generic "I'm sorry XXXX is not available at this time, please leave a message after the tone or press 0 for an Operator".

Urgent tab

Select **Urgent** to allow callers the option of going to voicemail or, if urgent, bypassing your location to ring your extension.

The caller identified within your contacts and/or All Calls is given an option to press * 'star' if the call is urgent and then go through to your

extension. Callers would get a generic "I'm sorry XXXX is not available at this time, please leave a message after the tone or press * if your call is urgent. Alternatively press 0 for an Operator".

Always tab

Select Always to allow All calls if checked, and/or those groups or contacts that are checked in the Contact Groups section, to ring your extension. Callers would be automatically diverted through to your extension, where as all other calls would go to voicemail as noted above.



Note: Never, Urgent and Always all work in conjunction with the Prime Time Location. If you require all calls to go to voicemail, but only a specific number of callers to go immediately to your phone, then you can create Contact groups to do just that as noted above.

For further information on setting up Contact Groups please refer to Groups.

See Also

Editing your Location settings in Live Desktop

Changing your extension's properties

Details Button

<u>D</u>etails

The **Details** button on the Presence Settings screen is a shortcut to the Extension Properties' **General** tab.

Extension:	304
<u>T</u> ype:	Digital Extension
MAC Address:	
	(Title) (Eirst) (Surname)
<u>N</u> ame:	Ms Tayanita Creek
<u>E</u> mail:	t.creek@example.com
LCD Name:	Tayanita Creek (Max 16 characters)
Position:	Marketing Manager
<u>U</u> ser level:	User 🔽 📀
Department:	Sales And Marketing
Region:	Local

The above tab displays your Extension, Name, Email Address and Position. Other options can only be changed by your IPFX Administrator.

Name

You can record or re-record your first and last name by clicking the icon next to your last name. Your phone will ring and when you answer you can either press 1 to listen to the recording or press 2 to re-record.

Email

Your email address must be entered in the Email field to enable

Voicemail messages to be sent to your email client.

Image

You can also embed a small picture of yourself into the **Call Alert** popup screen (so other users will see a picture of you as well as your details).

Click on the button to browse/upload an image from your hard disk. Only images under 50 kb in size can be used.

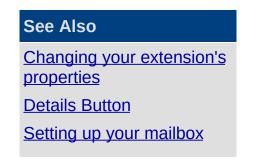
See Also
Changing your extension's properties
Viewing Queue Properties
Setting up your mailbox phone numbers
Properties
Groups Tab
Viewing Site Specific Details
PABX Tab
<u>Hours</u>
Related
Call Profiles
Call Profiles

Viewing Queue Properties

MOD or Call Centre Express

The screen shown below displays the Queue Access information as viewed by a user. To make changes to this information, users should see their IPFX Administrator or IPFX Supervisor Agent.

B	307 - Mr Torometi Tuki Para Properties 🛛 🔀				
G	ieneral Queues Numbers Options Groups Details PABX Hours Related				
	Enter default queue access information here.				
	Call				
	Queue Description Access Skill Start Time Start Work Time ✓ 401 Support Queue Automa + 9 ▼ Instant ▼ Instant ▼ Default ▼				
	✓ 401 Support Queue Automa 9 Instant Instant Default				
	ork time:				
A	uto Answer Queue Calls: 🗖 after 0 seconds.				
Pe	ersonal Queue Priority:				
	Max Min				
	OK Cancel Apply				



Changing Work Time

Auto Answer Queue Calls

Personal Queue Priority

phone numbersPropertiesGroups TabViewing Site SpecificDetailsPABX TabHoursRelatedCall Profiles

Changing Work Time

Select the work time required from the drop-down list. This will ensure that whenever you pick up or hang up the handset of your phone your location will be set to work time for the time you specify in this section. This is not a random work time feature, this is a default function for all calls.

📽 301 - Ms Fayola Law	al Propertie	S			
General Queues Numbers Options Groups Details PABX Hours Related Enter default queue access information here.					
Call					
Queue Description		Skill	Start Time		Work Time Default 👻
Work time:	Default	•		Add / Remo	ove Queues
Auto Answer Queue Calls: Personal Queue Priority:	Default None 2 Seconds 5 Seconds 10 Seconds 15 Seconds 20 Seconds 30 Seconds		onds. 	· · ·	0%
		0		Cancel	Apply

Note 1: The Queues section on the above screen is only visible by Supervisors or Administrators.

Note 2: For random work time selection please refer to Work Time. For Queue work time selection please refer to Queue Work Time.

See Also

Viewing Queue Properties

Auto Answer Queue Calls Personal Queue Priority

Auto Answer Queue Calls

If you are logged into a queue and this function is checked, your phone will be automatically answered and your caller will be available to speak to you. Therefore you *must not leave your phone unattended* if this function is checked otherwise your caller will be connected and not getting any response.

You can select a seconds indicator which will provide a ring tone to alert you to a call arriving.

Select the checkbox for Queue calls to be Automatically Answered.

See Also
Viewing Queue Properties
Changing Work Time
Personal Queue Priority

Personal Queue Priority

If this setting is at 100%, then an agent will receive incoming DDI/DID calls as well as queues at equal delivery.

If this is set to 0% (min), then if a DDI/DID and a queue call arrive at the same second, then the queue call will take preference.

If this is set to 300% (max), then if a DDI/DID and a queue call arrive at the same second, the DDI/DID call will take preference.

See Also

Viewing Queue Properties

Changing Work Time

Auto Answer Queue Calls

Setting up your mailbox phone numbers

The Phone Numbers button is a shortcut to the Extension Properties Numbers tab.

To enter your own contact numbers

- 1. Open the Extension Properties.
- 2. Click on the **Numbers** tab.

lote: Do not	remove or change	e the Office Extens	ion Number.
6	e Gill Properties Numbers Options Groups De e persons contact information her		
Office Extension: Associate: Mobile Phone: Home or Other: Pager Phone: Pager Type:	2103 +6499876543 None	<u>R</u> emote Access	
	ОК	Cancel Apply	/

3. Edit your phone details as required.

Note: Do not prefix your outside phone numbers with an outside line number, eg: 1 or 0. Do not enter spaces, dots, gaps or dashes when entering your phone numbers. And if networked with another site in another country, ensure you enter the number with the country and area code, i.e. +6493571218.

See Also

Changing your extension's properties

Details Button

Viewing Queue Properties

Properties

Groups Tab

Viewing Site Specific Details

PABX Tab

Hours

<u>Related</u>

Call Profiles

Properties

Properties

The *Properties* button on your Location screen is a shortcut to the Extension Properties Options tab.

You can set Voicemail and email options here.

How to Set Up your Voicemail mailbox Options

- 1. Open your Extension Properties form.
- 2. Click on the Options tab.

🖀 2105 - Ms Tayanita Creek Properties	×
General Queues Numbers Options Groups Details PABX Hours Relation Image: Choose the persons configuration options here. Choose the persons configuration options here. Context of the persons configuration options here.	ed
User Voicemail Settings User Can Receive Voicemail: Default (Yes) Quick Mail Entry Continuous Message Playback Message Light Tone Auto Logon Auto Logon Auto Answer Port Calls	
Caller Voicemail Settings Change Par Smart Greetings Transfer Message Record Instructions IM Inform Caller of Busy / No Answer Personal Queuing Allow Callback Directory	Busy epeat
Notification Turn Email Delivery On Notification Type: System Default Delete On Send: System Default (No) Record O	alls
OK Cancel	Apply

User Voicemail Settings

This Feature

Does This

Allows users to listen to their new messages immediately after they have entered their password instead of having to listen to the Main Menu

Quick Mail Entry	Options:
	(i.e. 1 to Listen to Messages, 2 to Send a Message, 3 to change Locations etc.).
	The default setting for this is ON.
Continuous Manager	If you do not want to hear the message options after each message is played, click on the checkbox to enable Continuous Message Playback. This will allow messages to be played back to back.
Continuous Message Playback*	You can still use the message options for each message to save, delete etc but they won't be announced until all messages have been played. You will be able to save/delete all remaining messages.
	The default setting for this is OFF.
Message Light Tone	When a Voicemail message is left by a caller, the message light will show on your phone. The default setting for this is ON.
Auto Logon	When this checkbox is selected, you will be able to push x1 (your code for voicemail i.e. 51 or 61) on your phone and instead of entering your password, you will be automatically logged on to voicemail.
Auto Answer Port Calls	When you want to record a Message Box, a Voicemail Message, etc, your phone rings and auto answers by default. this option allows your phone to ring and the user to pick up the phone, instead of it auto answering before timing out.

Caller Voicemail Settings

This Feature	Does This
Smart Greetings*	Smart Greetings will inform your caller where you are and your expected return time for all locations other than Office. i.e. 'I'm sorry, John Smith is in a meeting until 3pm' (then your own personal location greeting is played). If you do not use Smart Greetings, then you will need to re-record your greeting every time you are unavailable so your callers are kept informed of your current status. The default setting for this is ON.
Transfer Message	This notifies the caller that they are being transferred. I.e. "Please hold while I transfer you now".
Record Instructions	Record Instructions are given to the caller after your greeting message. Voicemail will say 'Please record your message after the tone and conclude by pressing the hash key' or the caller can change the message options (ie, Urgent, Private etc). If you do not want the caller to listen to these options, click in the checkbox to clear the option. The default setting for this is OFF.
Inform Caller of Busy/No Answer	If you are on a call or your phone goes unanswered, the caller will be informed of your phone status. i.e. 'I'm sorry, that line is busy' or 'I'm sorry, there was no answer' (then your own personal standard or busy greeting is played). The default setting for this is ON.
	Personal Queuing is created when this setting is ON. The caller will be asked to Hold while you complete your current call or to press the hash (#) key to leave a message. Retry on Busy will retry the extension after a set time ie. 30 seconds. If the line is still busy, the caller will be placed back on hold.

Personal Queueing	The default setting for this is OFF.
	Click the 'busy' icon to record an announcement to be played to the caller on reaching your voicemail, if you are on the phone.
	Teseat Teseat
	Click the 'Repeat' button to record an announcement to be played to a caller who is queuing.
Allow Callback	By setting Allow Callback to ON, the caller will be prompted for his phone number and the message. The number will be played to you when your current call is completed.
	You must have Caller on Hold / Retry on Busy setting to ON.
	The default setting for this is OFF.

Note: For more information on the features marked with a *, please refer to your IPFX Voicemail (Phone only) User Guide.

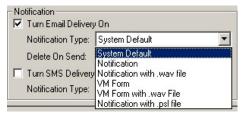
Email

Users can be advised by email when they have a voicemail message.

Check the Turn Email Delivery On box.

Notification Turn Email Delivery	0n		
Notification Type:	Notification Type: System Default		
Delete On Send:	System Default (No)	-	
Turn SMS Delivery On			
Notification Type:	System Default (Urgent Only)	-	

Select Notification Type from the drop-down menu.



System Default

The system default will be Notification with a .wav file.

Notification

This will send an email to you (the user) notifying you that you have a message in your message box.

Notification with .wav file

This will send an email to you (the user) notifying you that there is a message in your message box with the .wav file attached.

You will still need to listen to the message through your Voicemail to delete it.

VM Form

This will send an email allowing the user to open and listen to the message through their phone. No .wav file is attached.

VM Form with .wav file

This will send an email to Outlook 2000 allowing you to open and listen to the message through your phone or computer speakers. The attached .wav file can be saved and listened to at a later date if required. To listen to the message on your computer, you must have multimedia turned on.

Notification with .psl file

This will send email notification with a .psl attachment. This attachment is used by the IPFX UM player application. This is most often used with email clients other than Outlook or Lotus, such as Eudora or Pegasus.

Delete on Send

This option is only available for delivery methods where the voicemail message is attached to the e-mail notification as a .psl or .wav file. If selected, the voicemail message is automatically deleted from your voicemail box when the e-mail notification is sent. If you intend to play your voicemail messages from your e-mail client rather then via your telephone, this is a good option to save space on the IPFX Server.

SMS delivery

Users can be advised by text message when they have a voicemail message.

Check the Turn SMS Delivery On box.

Select Notification Type from the drop-down menu.

🔽 Turn SMS Delivery On			
Notification Type: System Default (None)			
	System Default (None) Never Notify Always Notify Notify On Urgent Only		

Change Password

Allows you to change your voicemail mailbox password.

Directory Fields

- Click on the Directory Fields button Directory Fields
- If you do not have sufficient access to modify your directory fields the following screen will display:



• If you do have permission, the following screen displays:

Show Fields			×
		your personal extension directory, cannot be removed from the direct Sh <u>o</u> w these fields in this order:	Na an ann an a
Associate Home/Other Location Start Time Mobile Office Extension Pager Position	Add ->	(Status Icon) *Extension Title *First Name *Last Name Department Location Return Time Region *Server	OK Cancel
		Move Up Move Down	

- Select fields required.
- Use Move UP/Move Down buttons to place selected fields in required order.
- Click **OK** when completed
- You will have to shut your Client down and reopen to view the Directory Column changes.

Record Calls

Check this box to allow your calls to be recorded by IPFX Voice Capture Solo Client or IPFX Voice Capture Server.

See Also

Changing your extension's properties

Details Button

Viewing Queue Properties

Setting up your mailbox phone numbers

Groups Tab

Viewing Site Specific Details

PABX Tab

Hours

Related

Call Profiles

Groups Tab

See Also

Changing your extension's properties

Details Button

Viewing Queue Properties

Setting up your mailbox phone numbers

Properties

Viewing Site Specific

<u>Details</u>

PABX Tab

<u>Hours</u>

Related

Call Profiles

In This Section

Personal Voicemail Distribution Groups Personal Contact Groups

Personal Voicemail Distribution Groups

To set up/edit your own Personal Voicemail Distribution groups:

- Right-click on your Extension in the Directory and select **Properties**.
- Select the **Groups** Tab.
- Select Create/change Personal Voicemail Distribution Groups to add or edit a Group.

🖀 304 - Ms Tayanita Creek Properties 🛛 🛛 🔀			
General Queues Numbers Options Groups Deta	iils PABX Hour	s Related	
Personal voice mail distribution			
050 - Management	Create	Play/Record	
	Change	Save	
	Delete		
Personal contact groups			
	Create		
	Change		
	Delete		
0			
Wildcards	Create		
	Delete		
	7		
OK	Cancel	Apply	

 When you select create/change, the following screen populates, enabling you to select the extensions and click the > (Move) button to add to the Group Extensions.

😵 Personal Voicema	ail Distribution Group	X
General		
Personal Voice	email Distribution Group Details	
<u>N</u> umber (050-099):	050	
Description:	Test Group	
Available Extensions:	Group Extensions:	-
0 - Operator Operator 410 - Grant Fisher 411 - Tony Hartigan 412 - Masina Maher 413 - Tony test2 450 - Roy Bates 451 - Neil Gibson 452 - Natalia Bell 453 - Grant Petersen 454 - Craig Carr 456 - Sharon Brodie 457 - Joanne Hulme 458 - Joanne Price 459 - Andrew Richard 472 - Kevin Plumpton 476 - Andrew McBeat	415 - Glenn Macdonald 416 - Don MacKenzie 418 - Robyn Waters 419 - Kylie Shipley K	
	OK Cancel	

• Click **OK** when this group has been set up.

Note To select more than one extension at a time, hold down the Ctrl Key.

To Change The Members In A Personal Distribution Group

- 1. Click Change.
- 2. Select/Highlight the Group you want to change from within the dropdown box.
- 3. Select/Highlight the Group Members you want to change from the Group Extensions.
- Click the < (move) button to Add individual member/s to your Group, or

click the > (remove) button to Remove the individual member/s to your Group.

- 5. Click Apply.
- 6. Click OK.

To Delete A Personal Voicemail Distribution Group

- 1. Select/Highlight the Group you want to Delete from the drop-down box of available distribution groups.
- 2. Click Delete.
- 3. Click **OK**, the Group will be Deleted.

Note: To Add all available Extensions to your Personal Voicemail Group click >> (Move All) button. To Remove all available Extensions from your Personal Voicemail Group click << (Remove All) button. For more information on Personal Voicemail Groups, refer to your Voicemail User Guide.

See Also

Groups Tab

Personal Contact Groups

Personal Contact Groups

Personal Contact Groups enable you to create a group of contacts which include Extensions, External Contacts, and Wildcards. This Personal Contact Group can then be used when setting up a Call Profile that will enable you to route anyone calling from that contact group via the phone system to a specific destination of your choice, when all calls would normally route through to voicemail.

Note: IPFX Administrator will see the Call Pickup Groups for an NEC PABX Platform under Personal Voicemail Distribution Groups.

To Create your own Personal Contact Groups

- Right-click on your Extension in the Directory and select **Properties**.
- Select the **Groups** Tab.
- Select Create or Change Personal Contact Groups to add to or edit a Group.

🗳 418 - Ro	obyn Waters Properties	×
General	Queues Numbers Options Groups Details PABX Hours Related	
Ø	Personal voice mail distribution groups. Image Image Delete Play/Record	
R	Personal contact groups.	
	Create Change Delete	
?	Wildcards New Plymouth Customers Test ((▼ Create Change Delete	
	OK Cancel Apply	

 When you select Create from the Properties Screen, Personal Contact Groups section, the following screen displays enabling you to either -

- Click the Select button to choose from the Contacts/Extensions/Wildcards currently active for the system, or
- Click the Create button to create a new Contact or Wildcard and/or select extensions.

	oup Properties			2
Extension: Description:	418			
Contacts E	xtensions Wildca	ards		
		Personal Cont	act	
				Select
		Company Cont	act	
Create	1			Select
Lieate				
			ОК	Cancel

To Create a Personal Contact

 Click Create. The New Contact screen shown below displays. Enter relevant data for your contact. Select Personal Contact from the drop-down box.

🖆 New Contact			×
General Notes			
Enter cont	act information h	ere.	
Address <u>b</u> ook:	Personal Conta	acts	~
Description:	Jim Jones		
Phone numbers:	Office Mobile Home	09 3572589 021885956 09 6546655	
Account code:			
<u>E</u> mail Address:	jim.jones@xtra.	co.nz	
Priority:	0 (Normal)	•	
Preferred <u>Q</u> ueue:	(none)	-	
Preferred Agent:	(none)	•	
		ОК	Cancel

• Click **OK** when this contact has been set up.

The new contact will be automatically selected in the **Contact Group Properties** view.

Adding a Personal Contact to a Contact Group

When you have created your Personal Contacts, you can add them to an existing Contact Group or create a New Group.

• Click **Change** from the **Properties** Screen.

The Contact **Group Properties** Screen displays showing existing contacts for that group (if any).

Contact Group Properties
Extension: 418 Description: ;est grp
Contacts Extensions Wildcards
Personal Contact
Company Contact
<u>Create</u> <u>Select</u> OK Cancel

 Click the Contacts Tab then click the Select button from this Screen.

The **Select Personal Contacts** Screen displays showing existing contacts for that Group.

🔀 Select Personal Contacts					X
General					
Select Personal Contacts					
Available:	>>		One - Home (0 Vest - Office (143)
Sharon Brodie - Home (+64 0693571: Sharon Brodie - Mobile (+64 0693571: Sharon Brodie - Mobile (+64 0219226 Sharon Brodie - Office (+64 0935711 Testing One - Mobile (025123456) Testing One - Office (09 345 6789) Tim Smith - Home (09 479 1000) Tim Smith - Mobile (021 1231234) Tim Smith - Office (09 3456789)	> < <<				
Wendy West - Home (00) 412 9674) Wendy West - Mobile (0274 455595) WendyTest - Home (4121234)		× 1	Cancel	1	
		<i>ж</i>	Cancer		

 Highlight the required contact(s) and click the >(Move) button to add the Selected Contacts.

Click OK.

 Your selections will then display in the Contacts field as shown in the screen below.

tension:	418			
scription:	test grp			
ontacts E	xtensions Wildca	ards]		
		Personal C	Contact	
home (479 1				
√endyTest	(579 6443)			
				<u>G</u> reate <u>S</u> el
		Company (Contact	<u>Greate</u> Sel
		Company (Contact	
		Company (Contact	<u>Greate</u> Sel
		Company (Contact	<u>C</u> reate <u>S</u> el

Adding Extensions to your Contact Group

• Click the **Extensions** Tab from the Contact Group Properties screen.

(The Screen below displays with the selected extensions for this group).

Contact Gro	oup Properties		×
Conta	ct Group Details		
xtension: escription:	418 test grp		
Contacts E	xtensions Wildcards		
	Exte	nsion	
414 · Mark \	Valker		
415 - Glenn			
416 · Don M			
418 - Robyn	Waters		
			Select
		ОК	Cancel

 Click Select to Add/Remove extensions. The Select Extensions screen displays.

III Select Extensions		
General Select Extensions	<u>S</u> elected:	_
0 - Operator Operator 410 - Grant Fisher 411 - Tony Hartigan 412 - Masina Maher 413 - Tony test2 414 - Mark Walker 450 - Roy Bates 451 - Neil Gibson 452 - Natalia Bell 453 - Grant Petersen 454 - Craig Carr 456 - Sharon Brodie 457 - Joanne Hulme 458 - Joanne Price 459 - Andrew Richards 472 - Kevin Plumpton	A15 - Glenn Macdonald 416 - Don MacKenzie 418 - Robyn Waters 419 - Kylie Shipley	
	OK Can	cel

- Add extensions to the Selected list by highlighting the Available extensions and clicking the > (Move) button.
- Click OK.

Adding Wildcards to your Personal Contact Group

 Click the Wildcards Tab from the Contact Group Properties screen, as displayed below.

escription: Test grp Contacts Extensions WildCards	
Contacts Extensions WildCards	
l lease and	
Wildcard	
New Plymouth Customers Test (06")	

 Click Create to create a Wildcard to add to your Personal Contact Group.

The Contact Group Wildcard Properties Screen displays.

• Enter the Description and Wildcard details as required.

😲 Contact Gro	oup Wildcard Properties	
General		
Conta	ct Group Wildcard Details	
<u>E</u> xtension:	456	1
Description:	New Plymouth Customers	
<u>W</u> ildcard:	06*	
		OK Cancel

• Click OK.

To Add an existing Wildcard to your Group

Click the Wildcards Tab from the Contact Group Properties screen.

• Click the **Select** button.

The Select Wildcards screen displays.

sneral Refect Wildcards	
Available: Testing4 (*07) xxxx (01#)	Selected:

- Add/Remove Wildcards by selecting and using the < > (Move) buttons.
- Click OK.

Note: To select more than one item at a time, hold down the Ctrl Key.

See Also

Groups Tab

Personal Voicemail Distribution Groups

Viewing Site Specific Details

The Details Tab enables you to update Site Specific information prompted by your Supervisor/Administrators.

418 - Ms Angie Wilson Propertie	5
eneral Queues Numbers Option	Groups Details PABX Hours Related
Miscellaneous Information.	
Description	Value
Access No	
Birthday	
Building Location	
Car Registration	
Notes:	Add Delete Criteria
L	

Description: the field name.

Value: This field can be updated with the information required. This will be either free text or a selection criteria. To populated this field, double-click on the income to the right of the Value field.

Note Users can add to the value field by editing their own extension properties. They can also add their own notes. If you find that you cannot edit these values, please refer to your IPFX Administrator for access rights.

Editing a Value

- The behaviour of this button depends on the whether the value type is 'free text' or 'criteria':
- If the value is selected from a drop-down criteria list, clicking the button will have the same effect as clicking the Criteria button.
- If the value is free text, clicking the button will open the Text Edit

Window.

- About the Text Edit Window
- The Text Edit Window is fully resizable with its size and position saved.
- The maximum number of characters available for the field value is displayed, alongside the number of characters currently used. When the maximum number of characters is reached by the field text, this information will turn red.
- If you make changes to the text the Apply button to become enabled.
- Clicking Apply immediately updates the Value on the Extension Properties screen and disables the Apply button.
- Clicking Cancel if no changes have been made will immediately close the window, however, if changes have been made the user will be asked to confirm abandoning those changes.
- Clicking OK will save any changes and close the window.

See Also

Changing your extension's properties

Details Button

Viewing Queue Properties

Setting up your mailbox phone numbers

Properties

Groups Tab

PABX Tab

<u>Hours</u>

<u>Related</u>

Call Profiles

PABX Tab



IPFX allows a user to have PABX details within the extension.

🖆 305 - Mr Koorong	Jones Properties	×
	bers Options Groups Details PABX Hours Related	
DDI: Outbound CLID Type: Outbound CLID:	DDI 🗨	
Forward	Reboot Extn	
Forward <u>B</u> usy:	51 Reset Extn	11
Forward <u>N</u> o Answer:	51	-
Forward <u>T</u> imeout:	20	
Forward <u>N</u> U:	51	
(Number Unobtainable) def	aults to No Answer if not set	-33
<u>R</u> oute Level:	International	
	OK Cancel Apply	

This Feature	Does This
DDI/DID	Shows the DDI/DID connected to this extension number (greyed out for users)
	Displays the type of Outbound DDI Type. Select from the drop-down Menu. Available options are:: None: The PBX pilot number will be used for CLID presentation
Outbound CLID Type	DDI: The extension's DDI will be used for CLID if any. If not then defaults to "none".
	Other: The value of Outbound CLID field will be taken as CLID, If left empty reverts to "None".
	Restrict: CLID is withheld, i.e. called party will see no CLID.
Outbound CLID	This displays the CLID that the company is displaying when you make an outbound call.
Forward All	When a user's location is set to Forward All Calls To Voicemail, the 'forward all' selection is populated with the destination of the Voicemail Port.
Forward Busy	The 'forward busy' selection is always set to divert to the Voicemail Port.
Forward No Answer	The 'forward no answer' selection is always set to divert to the Voicemail Port.

Forward Timeout	The 'forward timeout' selection is for adjusting how long the user's extension rings before diverting to voicemail.
Forward NU	Destination is unobtainable. When a caller phones your extension, if your phone is unobtainable this setting advises where your callers go.
Reboot Extn	This button is not visible to users. This feature causes a full reload and will drop any calls that are in progress.
Reset Extn	This button is not visible to users. This feature is used to update the phone.
Route Level	Select the Route Level from the drop-down Menu. (greyed out for Users)

Note The Forward Timeout selection must exceed the Queue Pullback timeout if the agent is in the queue, otherwise queue calls will not pull back from the queue, but deliver to the agent's voicemail.

See Also

<u>Changing your extension's</u> properties <u>Details Button</u>

Viewing Queue Properties

Setting up your mailbox phone numbers

Properties

<u>Groups Tab</u>

Viewing Site Specific Details

<u>Hours</u>

Related

Call Profiles

Hours

Hours enables your location when set to 'Gone for the Day', 'On Holiday' or 'Sick Leave' to have a return time that is either the company default settings, or your individual settings. i.e. If your Department works different hours from the Company standard hours, you can select the appropriate times from the drop-down menus.

The Hours Tab displays the screen below.

🖹 305 - Mr Koorong Jones Properties 🛛 🔀					
General Queues Numbers Options Groups Details PABX Hours Related					
Extension-specifi	ic Business Hou	rs			
Use setting from:	Company	•			
<u>S</u> tart Time:	08:30:00	w.			
<u>E</u> nd Time:	17:30:00	-			
					_
		ОК	Cance	el Appl	У

This screen is used to set Extension-specific Business Hours.

To Change Settings

Use the drop-down menu to choose from the following options:

- Company (uses default hours)
- Department (inherits hours from department)
- Custom (allows you to set your own hours by using the drop-down menus for Start Time and End Time)

See Also

Changing your extension's properties

Details Button

Viewing Queue Properties

Setting up your mailbox phone numbers

Properties

Groups Tab

Viewing Site Specific Details

PABX Tab

Related

Call Profiles

Related

The Related Tab enables a user to detail any internal or external contacts that they wish to use for reference if they are not available to take a call.

These details will populate in the Insight feature when diverting a call to another user or the Operator. For further information, please refer to your User Manual for Viewing another users appointments.

Related Extensions:	
Name	Relationship
411 - Tony Hartigan	
412 - Masina Maher	
473 - Operator Operator	
	<u>S</u> elect
Related Contacts: Contact	<u>S</u> elect Relationship
Contact	
Contact home (479 1440)	
Contact home (479 1440)	

Related Extensions

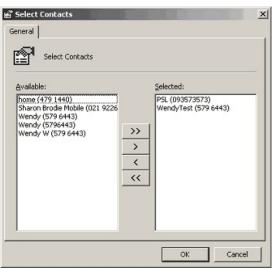
Click the **Select** button to display the **Select Extensions** screen.

General Select Extensions		×
Available: 10 Grant Fisher	Selected:	
	ок са	ancel

Use the Move buttons to Add/Remove extensions as required. Click **OK**.

Related Contacts

Click the Select button to display the Select Contacts screen.



Use the Move buttons to Add/Remove Contacts as required.

Click OK.

See Also
Changing your extension's properties
Details Button
Viewing Queue Properties
Setting up your mailbox phone numbers
Properties
Groups Tab
Viewing Site Specific Details
PABX Tab
<u>Hours</u>
Call Profiles

Call Profiles

Call Profiles enable you route specific callers through to various messages or destinations based on CLI (Calling Line Identification).

A Profile enables you to set up a Personal Contact Group that can include one or more contacts from either an external, internal or wildcard source, that in turn can route callers through to:

- Divert through to a specific destination, eg: voicemail, operator, associate, home/other number.
- Play a specific message.
- Play a specific message at a specific date/time.

Example A: Customers A and B will be calling today and although I am in a meeting all day, if they call I would like to divert them immediately to my mobile.

Example B: Customers A and B are VIP Customers awaiting a special package delivery and although I am in meeting all day, if they call I would like to play a special message, eg: "Customer A/B, thank you for calling. I am in a meeting all today, but the package you are waiting for should be with you by mid afternoon. I will follow up with you tomorrow to confirm further arrangements".

Example C: If Customer A and B call me between 2pm and 4pm then I want to play a specific message, but if they call at any other time of day, I will play the generic Location message.

There is no limit to the number of Profiles you set up, however, it is recommended that you delete obsolete profiles to avoid confusion.

To view Call Profile Settings

1. Click the **Location** icon.

The Location screen will appear:

Time	§ :∀́:						}	٦	•			9		
Inknown 2:15 AM]												F
2:30 AM 2:45 AM :00 AM :15 AM :30 AM :45 AM 2:00 AM 2:15 AM	27 6 13 20 27	28 7 14 21 28	1 8 15 22 29	2 9 16 23 30	3 10 17 24 31	4 11 18 25	5 12 19 26	3 10 17 24 1	4 11 18 25 2	5 19 26 3	6 13 20 27 4	7 14 21 28 5	1 8 15 22 29 6	2 9 16 23 30 7
fice perator Instruc	tions												Cle	ear
														~

2. Click the Call Profiles button to open this screen:

Profiles							
Description	Priority	Contact G	roups <u>S</u> etting	IS			
Primetime Never	6	Setting	s		-Relevant Lo	ations	
Primetime Urgent	7	1000	Location Greeting		Office		
Primetime Always	8		Caller Profile Greeting	Deserved	🗌 In A Meetin	ng	
Customers	7				Prime Time		
General business	3		onal Queue Greeting		Gone Out		
Family	9	(Only	y applies to Office loc	ation)	Gone For D		
Managers Profile 👘	0				On Holiday		
		Norm	al Notification		On A Break	c .	
		C Urger	nt Notification		Away On B		
		Priority	7		u b bu re		
			,		Validity Time		
		Caller T	ransfer Keys		C All Hours	Business Ho	urs 🔿 Custom
		Key O	Operator	225	Day	Start	End
		Key 1	No Transfer	-	Monday 👻	08:30 🗸	17:30 👻
					Tuesday 💌	08:30 🗸	17:30 👻
		Key 2	No Transfer	-	Wednesda; 🔻	08:30 💌	17:30 💌
		Key 3	No Transfer	-	Thursday 🔻	08:30 🗸	17:30 💌
					Friday 💌	08:30 🗸	17:30 💌
		Key 4	No Transfer	-			
		Default			Add	Remove	1
Add Delete	Copy	Derault	Voicemail	-	Auu	Kemove	
		100					
					<u>o</u> k	Cancel	Apply

Adding a New Call Profile

Note If you are setting a 'one off' Call Profile, ensure you delete it when it is no longer required, otherwise the Caller will continue to hear the same message based on your setup criteria.

- To Add a new Call Profile
- 1. Click Add on the Location Profile Settings screen.

You will be prompted to enter a name for the new Profile.

301 - Location P	rofile Setti	ngs	
Profiles			
Description	Priority	Contact Groups Settings	
Primetime Never	6	Settings Relevant Locations	_ []
Primetime Urgent	7	▼ Play Location Greeting	
Primetime Always	8	Play Caller Profile Greeting Record	
Customers	7	IIIII ✓ Prime Time	
General business	3	Personal Queue Greeting Record Gone Out	
Family	9	(Only applies to Office location)	
Managers Profile	0	On Holiday	
		Normal Notification On A Break	
		C Urgent Notification	
		Defaulty 7	
		Validity Times	
		Caller Transfer Keys C All Hours C Business Hours C Custo	m
		Key 0 Operator Day Start End	
		Key 1 No Transfer Monday 08:30 17:30	
		Key 2 No Transfer	·
		Key 3 No Transfer Thursday V 08:30 V 17:30 V	·
		Friday 🔻 08:30 💌 17:30 💌	<u>-</u>
		Key 4 No Transfer	
		Default Voicemail Add Remove	
Add Delete	Сору		
		<u>QK</u> <u>Cancel</u> Apply	

2. Choose a name for the new Profile and click **OK**.

Tip: Make sure it is a name that you can identify its purpose by.

Add Profile	×
Enter the new profile name	OK Cancel
Working on K45 Project	

Click **OK**, the new Profile will be created.

You can select whether this profile is active for **All Calls**, or you can select **Groups Listed Below**, which will enable you to add Personal Contact Groups to this profile.

If you select **Groups Listed Below,** you can add or edit a Personal Contact Group.

When your selected group is in place, click on the Settings Tab.

See Also
Call Profiles
Add the Settings/Properties to your Call Profile

Add the Settings/Properties to your Call Profile

Click the Settings button and select the settings you want active for the selected Profile.

301 - Location P Profiles	rome setti	B.	
Description	Priority	Contact Groups Settings	
Primetime Never	6	Settings Relevant Locations	
Primetime Urgent	7	✓ Play Location Greeting	
Primetime Always	8	The A Machine	
Iustomers	7	Prime Time	
General business	3	Personal Queue Greeting Record Gone Out	
amily	9	(Only applies to Office location) Gone For Day	
Managers Profile	0	On Holiday	
-		Normal Notification Sick Leave On A Brook	
		Normal Notification On A Break Away On Business	
		Priority 7 Validity Times	
		C All Hours Business Hours	s C Custom
		Key 0 Operator Day Start	End
		Key 1 No Transfer Monday 08:30 1	7:30 🔻
		Tuesday v 08:30 v 1	.7:30 💌
		Key 2 No Transfer Vednesda; Ve	.7:30 💌
		Key 3 No Transfer V Thursday V 08:30 V 1	.7:30 💌
		Friday 🔻 08:30 💌 1	.7:30 💌
		Key 4 No Transfer	
Add Delete	Сору	Default Voicemail Add Remove	
		QK Cancel	Apply

Settings



Select whether the caller will hear your standard Location greeting and/or their own personalised greeting, or the standard system message only, or the standard system message followed by a personalised greeting message.

Check the 'Play Location Greeting' box to automatically play the system recorded location message.

i.e. "I'm sorry, John Smith is out of the office until 2.00pm" .

Check the Play Caller Profile Greeting box to play your personalised recorded message for a particular caller.

(You must record an individual profile greeting).

Check the Personal Queue Greeting box to play your personal prerecorded message informing callers you are currently on the phone and they are in the queue for your phone.

Check the Play Location Greeting and Play Caller Profile Greeting buttons to play both the standard system greeting then the pre-recorded personalised message. i.e. "I'm sorry, John Smith is out of the office until 2.00pm" will be followed by "Hi Andrew, I'm not available at the moment, but phone me on my mobile and we can arrange."

Select the priority you wish this profile to take over other profiles, eg: 9 being the highest and 1 being the lowest.

Caller Transfer Keys

Caller Tra	ansfer Keys
Key O	Operator
Key 1	Associate 💌
Key 2	Mobile Phone
Key 3	No Transfer 📃 💌
Key 4	No Transfer 📃 💌
Default	Voicemail 💌

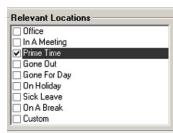
Change the **Caller Transfer Keys** that you want the caller to use.

In the example above, Key 1 would be set to Associate; Key 2 would be set to mobile phone.

If no key press is entered, the caller will go to voicemail as the default.

Note If you change the Caller Transfer Keys, you will need to record a Caller Profile Greeting that advises the caller of which keys to press.

Locations



Set the *Locations* that apply to this Profile, i.e. the Call Profile message will only play when your Location is set.

Validity Times

All Hours C Business Hours C Custom			
Day	Start	End	
Add	Remove		

Set the Validity times that apply to this Profile. These can be set for All Hours, Business Hours (8.30am to 5.30pm) or Customized, i.e. the above Profile is only to be played between 10.00am and 2.00pm on a Friday.

Tip Setting customized validity times allows for some flexibility between setting the Call Profile and cancelling it after it has been used. **Note** The Business Hours are the system settings.

See Also

Call Profiles

Adding a New Call Profile

Voicemail

This section explains the options available when you click on **Voicemail** on the IPFX Live Desktop Toolbar.

In This Section	
What is Voicemail?	See Also
<u>Voicemail Icon</u> <u>Voicemail Toolbar /</u> <u>Playback Controls</u>	IPFX Phone Control Toolbar
<u>Other Voicemail Folders</u> <u>To view</u>	<u>Using locations</u> <u>Send a message</u> <u>Directory</u>
<u>new/saved/deleted/future</u> voicemail messages	Queues
<u>Opening a Voicemail</u> <u>Message</u>	<u>Dial</u> <u>Work Time</u>
<u>Deleting a Voicemail</u> <u>Message</u>	<u>Contact</u> Record
Quick Notification of Voicemail Messages	Reports
Remote Voicemail Access	<u>Options</u>
Forward to Voicemail	

What is Voicemail?

Voicemail is where messages left on your phone will display.

It enables you to listen, reply, delete or save the messages without having to pick up your phone (depending on your phone type).

You can tell at a glance whether you have new voicemail messages by the colour of the Voicemail icon on the top toolbar.

The Voicemail screen is split into two screens. The top screen shows all Voicemail messages. The lower screen shows current calls and allows you to pick up the call, send the call to voicemail or retrieve the call from voicemail.

See Also
Voicemail
Voicemail Icon
<u>Voicemail Toolbar / Playback Controls</u>
Other Voicemail Folders
To view new/saved/deleted/future voicemail messages
<u>Opening a Voicemail Message</u>
Deleting a Voicemail Message
Quick Notification of Voicemail Messages
Remote Voicemail Access
Forward to Voicemail

Voicemail Icon

The voicemail icon changes colour according to the type of message sent.



Normal. This displays when there is no new message, or the message has been opened.



(Yellow Icon)

Message in Voicemail. This will show when there is a normal message left in voicemail.



Urgent Message in Voicemail. This will show when there is an Urgent message left in voicemail regardless of how many normal messages there are.

IPFX Administrator should see **Extensions** - **Options Tab** - **Record Instructions** in the IPFX Administrator Guide for more information.

See Also

<u>Voicemail</u>

What is Voicemail?

Voicemail Toolbar / Playback Controls

Other Voicemail Folders

<u>To view</u> <u>new/saved/deleted/future</u> <u>voicemail messages</u>

<u>Opening a Voicemail</u> <u>Message</u>

Deleting a Voicemail Message

Quick Notification of Voicemail Messages

Remote Voicemail Access

Forward to Voicemail

Voicemail Toolbar / Playback Controls

Previous / Next

Previous This allows you to revert back and start listening to the Previous message.

Next Will allow you to fast forward to the next message.

Play Controls

Play	Plays the current selected message.
Pause	Pauses the current message you are listening to.
Replay	Replays the current message you are listening to.
Stop	Stops and reset the current message you are listening to.

Message Options

Phone

This allows you to phone the person who left you the message. This feature will *not* work for external callers unless you have CLID (Caller Line ID) .

Note Many organizations 'distribute' a pilot number that will call their main company line, not the individual's DDI.

Reply This allows you to record and send a reply back to the internal caller who left you the message. A message that is replied to will show 'RE:' at the beginning of the subject line.

Forward This allows you to forward a copy of the message you were just listening to to another Internal Mailbox or Mailboxes. The forwarded message will show 'FD' in the start of the subject line. Note You cannot forward the message if it is marked Private.

Save / Delete

- Save This will save the message you are currently listening to/or have just listened to. You can also save the message without listening to it. Delete This will delete the selected message.
 - You can delete the message without listening to it.

Volume Button

Click on the volume button to display the drop-down menu.

Select your volume preference. Select from Zero to 100%.

Message length slider and Time.

As your message is played, the slider will move along giving you an indication of how long the message has been playing.

VoicemailWhat is Voicemail?Voicemail IconOther Voicemail FoldersTo view new/saved/deleted/future voicemail messagesOpening a Voicemail MessageDeleting a Voicemail MessageQuick Notification of Voicemail MessagesQuick Notification of voicemail Access
Voicemail Icon Other Voicemail Folders To view new/saved/deleted/future voicemail messages Opening a Voicemail Message Deleting a Voicemail Message Quick Notification of Voicemail Messages
Other Voicemail Folders To view new/saved/deleted/future voicemail messages Opening a Voicemail Message Deleting a Voicemail Message Quick Notification of Voicemail Messages
To view new/saved/deleted/future voicemail messages Opening a Voicemail Message Deleting a Voicemail Message Quick Notification of Voicemail Messages
new/saved/deleted/future voicemail messages Opening a Voicemail Message Deleting a Voicemail Message Quick Notification of Voicemail Messages
Message Deleting a Voicemail Message Quick Notification of Voicemail Messages
Message Quick Notification of Voicemail Messages
Voicemail Messages
Remote Voicemail Access
Forward to Voicemail

Other Voicemail Folders

Similar to email, Voicemail lets you sort your messages for future reference. Other folders include: Inbox, Saved, Deleted, Sent and Future.

New Messages

Messages you have recently received and any you have already listened to but not yet saved or deleted. Messages not yet listened to will be bold. New Messages will be saved indefinitely until Saved or Deleted.

Saved Messages

Messages you have saved. It is often a requirement to save specific messages so you can refer back to them at a later time. These messages will be saved for **10 days** (unless specifically changed for your company).

Deleted Messages

Messages you have deleted. Deleted messages are kept for **3 days** (unless specifically changed for your company) so you can refer back to them or forward them onto someone else.

Sent Messages

Messages you have sent to other people. If you want to go back and resend the same message to someone else, you can forward it from here. Sent Messages are kept for **3 days** (unless specifically changed for your company).

Future Delivery Messages

Messages you have requested to be delivered at a future date and time. They will remain here until delivered or you can delete them.

Tip Press # if you wish to retain a voicemail message in your 'In box' indefinitely (i.e. do not press 1, 2 or 3).

Note The *#* (hash) key represents Skip/or continue. The * (star) represents cancel, i.e. go back one step.

See Also

Voicemail

What is Voicemail?

Voicemail Icon

Voicemail Toolbar / Playback Controls

To view new/saved/deleted/future voicemail messages

Opening a Voicemail Message

Deleting a Voicemail Message

Quick Notification of Voicemail Messages

Remote Voicemail Access

Forward to Voicemail

To view new/saved/deleted/future voicemail messages

To change Voicemail folders

1. Click on the **Inbox** to display the drop-down box.

Inbox	
Inbox	
Saved	
Deleted	
Sent	
Future	

- 2. Click the folder you want to view.
- 3. The folder will be displayed with any messages visible:

Save	:d			
+ +	▶ 11 41 =	0	Qə 😡 🖂 🛯	
10	Received	4	From	Subject
6	2001/07/13 08:07	_	2634113	
A	2001/07/16 13:44		6390700	
0	2001/07/16 17:02		Michelle Eddy	
! 🖂	2001/07/16 17:03		Michelle Eddy	Indexing Master Directorie
0	2001/07/17 09:19		3573573	

See Also

Voicemail

What is Voicemail?

Voicemail Icon

Voicemail Toolbar / Playback Controls

Other Voicemail Folders

Opening a Voicemail Message

Deleting a Voicemail Message

Quick Notification of Voicemail Messages

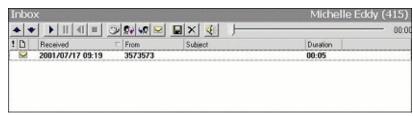
Remote Voicemail Access

Forward to Voicemail

Opening a Voicemail Message

To open a Voicemail message

- 1. Click on the Voicemail icon on the top toolbar.
- 2. The Inbox will open and display your messages:



- 3. Double-click the message OR click the message and press the **Play** button on your toolbar. Your phone will then ring.
- 4. Once you have answered your phone, the selected message will commence playing.

Note: The system is Voice Activated. You must speak or make a noise to start the message playing.

See Also Voicemail What is Voicemail? Voicemail Icon Voicemail Toolbar / Playback Controls Other Voicemail Folders To view new/saved/deleted/future voicemail messages Deleting a Voicemail Message Quick Notification of Voicemail Messages Remote Voicemail Access Forward to Voicemail

Deleting a Voicemail Message

To delete a Voicemail message

Select the message you want to delete, then click the **Delete** button on the toolbar.

The message will be deleted to the Deleted Items Folder.

After 3 days (or the time specified for your company), the message will be permanently deleted.

See Also
Voicemail
What is Voicemail?
Voicemail Icon
Voicemail Toolbar / Playback Controls
Other Voicemail Folders
To view new/saved/deleted/future voicemail messages
<u>Opening a Voicemail Message</u>
Quick Notification of Voicemail Messages
Remote Voicemail Access
Forward to Voicemail

Quick Notification of Voicemail Messages

When you receive a Voicemail Message, an icon will appear in your Windows System Tray notifying you of the message.

You can 'wave' your mouse over the icon which will display the number of messages in your voicemail inbox.

The icon will appear blue if a normal voicemail message has been left



The icon will appear red if an urgent voicemail message has been left.



Note Double-click on the Icon to open the Voicemail screen.

See Also

<u>Voicemail</u>

What is Voicemail?

Voicemail Icon

<u>Voicemail Toolbar /</u> <u>Playback Controls</u>

Other Voicemail Folders

<u>To view</u> <u>new/saved/deleted/future</u> <u>voicemail messages</u>

<u>Opening a Voicemail</u> <u>Message</u>

Deleting a Voicemail Message

Remote Voicemail Access

Forward to Voicemail

Remote Voicemail Access

See Also

<u>Voicemail</u>

What is Voicemail?

Voicemail Icon

<u>Voicemail Toolbar /</u> <u>Playback Controls</u>

Other Voicemail Folders

<u>To view</u> <u>new/saved/deleted/future</u> <u>voicemail messages</u>

<u>Opening a Voicemail</u> <u>Message</u>

Deleting a Voicemail Message

<u>Quick Notification of</u> <u>Voicemail Messages</u>

Forward to Voicemail

In This Section

Saving money by specifying Remote Access numbers

<u>Clearing Voicemail</u> <u>Messages when you are</u> <u>Offsite</u>

Saving money by specifying Remote Access numbers

Calling to check your voicemail from your mobile phone or another external number usually costs money even if you have no waiting messages because providers charge as soon as a call is connected.

The IPFX system can help you to save the cost of the call when you have no messages waiting. You specify a list of phone numbers from which you expect to call your voicemail ("Remote Access" numbers). Any time you call your company's backdoor voicemail number from a Remote Access number, the IPFX system will recognize you and check whether you have waiting messages. If you have no waiting voicemail messages, the voicemail system will *delay answering your call*, giving you time to hang up before the call is connected.

To set up Remote Access numbers

- 1. Click the **Location** button.
- 2. The Location window appears:

Location - 2103															
🖀 🛣 😤 :	°.	Ø	0	5	Ø	5	20	1	No.	7	C	Ì	¢		L
Time Unknown 12:15 AM		N	over	nbei	200	6			D	ecei	nber			n Sett	ings
12:30 AM 12:45 AM 1:00 AM 1:15 AM 1:30 AM 1:45 AM 2:00 AM 2:15 AM	30 6 13 20 27	31 7 14 21 28	1 8 15 22 29	2 9 16 23 30	3 10 17 24	4 11 18 25	5 12 19 26	4 11 18 25 1	5 12 19 26 2	6 13 20 27 3	7 14 21 4	1 8 15 22 29 5	2 9 16 23 30 6	3 10 17 24 31 7	
🔽 Indefinite	Office	ľ.											ck		L
Operator Instructions														ar A	l
									1	<u>o</u> k		<u>(</u>	ance		

Click the Location Settings button.

3. The Location Settings window appears:

Diversion After Busy or No Answer Immediately Divert To: Voice Mail	Notifications of New Messages Notifications Normal Messages No Notification No Notification Urgent Messages Urgent Messages
Greetings Standard Standard Office Busy Record Name Record Record Record Caller Transfer Keys O Operator 1 Associate No Transfer No Transfer	Same As Normal using Preference Settings from the Main Menu. Notification Times Image: All Hours All Hours Business Hours Custom Image: All Hours Monday Times Vednesday To Image: Triday Saturday Saturday Sunday

Click the **Phone Numbers** button.

4. The Phone Numbers window appears:

2103 - Ms Aynsl	ie Gill Properties	×
General Queues	Numbers Options Groups Details PABX Hours Related	
🔊 Enter th	e persons contact information here.	
Office Extension:	2103 Remote Access	
Associate:	high high high high high high high high	1
Mobile Phone:		
Home or Other:		
Pager Phone:		
Pager Type:	None	
1 <u>9-</u>		
	OK Cancel Apply	
		_

Click the **Remote Access** button.

5. The Remote Access window appears:

	1	1	-
Number		Auto Login	112
			_
	Remove		
bbA			

Click the **Add** button.

6. Click in the text box that appears and enter a phone number from which you expect to call your voicemail (for example, your mobile phone number or your home phone number):

Nun	nber	Auto Login
998765432		
Add	Remove	
Add	Remove	

Tip! Select the Auto Login checkbox to skip the password check when you call from this phone number.

- 7. Repeat from step 5 if you wish to add more Remote Access numbers to the list.
- 8. Click OK.

To check your voicemail for new messages using a Remote Access number:

- 1. Call your organisation's backdoor number from a phone that you have set up as a Remote Access number .
- 2. If you hear a ringing tone, *hang up*: you have no new voicemail messages.
- 3. If the call connects immediately, you have new messages.

Enter your password (if prompted).

4. You now have access to your voicemail messages.

See Also

Remote Voicemail Access

Clearing Voicemail Messages when you are Offsite

Clearing Voicemail Messages when you are Offsite

To check your voicemail from a remote location via your DDI/DID

- 1. Call your DDI/DID number.
- 2. When the voicemail system answers, it will begin to play your greeting.

Press ***#** immediately do not wait for the greeting to finish.

3. The voicemail system will announce your name.

Tip! If you have voicemail messages waiting, you will hear a short bell sound: *ding!* If you do not hear the bell, you have no new messages and may choose to hang up.

The voicemail system will ask you to enter your password.

Enter your password.

4. You now have access to your voicemail messages.

To check your voicemail from a remote location via a backdoor number

- 1. Call your organisation's backdoor number.
- 2. Enter your extension number at the voice prompt and press #.
- 3. The voicemail system will announce your name.

Tip! If you have voicemail messages waiting, you will hear a short bell sound: *ding!* If you do not hear the bell, you have no new messages and may choose to hang up.

The voicemail system will ask you to enter your password.

Enter your password.

4. You now have access to your voicemail messages.

See Also

Remote Voicemail Access

Saving money by specifying Remote Access numbers

Forward to Voicemail

Sends an incoming call to voicemail.

See Also
<u>Voicemail</u>
What is Voicemail?
Voicemail Icon
Voicemail Toolbar / Playback Controls
Other Voicemail Folders
To view new/saved/deleted/future voicemail messages
<u>Opening a Voicemail Message</u>
Deleting a Voicemail Message
Quick Notification of Voicemail Messages
Remote Voicemail Access

Send a message

What is "Sending a Message?"

Allows you to record and send voicemail messages, send SMS messages and emails to as many internal mailboxes as you require simultaneously.

You can send messages to a pre-defined group (see Config / Extension / Groups Tab or your voicemail Guide) or a selected group of mailboxes.

Sending a voicemail message is similar to sending an email, however voicemail messages are deemed more personal and allows for more accurate interpretation.

Note: You cannot send messages to extensions that belong to remote servers (via Inter-Server Networking) using the IPFX Telephony Toolbar's Send button. To send messages to extensions belonging to remote servers, locate the extension in the IPFX Explorer extension list (IPFX Explorer > Extensions) and select Send from the context menu.

See Also

Send a message

Sending a Message

Sending a Message

To send a message

1. Click on the \mathbb{M}_{Send} button on the toolbar.

The Send a New Message screen will appear:

V	/oicemai	l Message C	SMS Message	•	Em	ail		
To Extensions: Distribution Groups:								
	Extn	First Name 🛆	Last Name 🔄	-		Group	Des	cription
	451	Aaron	Beveridge			000	ALL	
	476	Andrew	McBeath	L		001	Service	
	418	Angie	Wilson	L		002	Developn	nent - VB
	419	Anna	Riley	L		003	Developn	nent - C++
	499	Auckland	Service Fax	L				
	454	Craig	Carr	L				
	474	Damian	Coventry	L				
	482	Danielle	Drylie	L				
	463	Demo	SoftPhone	L				
	461	Demo	One	L				
	413	Development	Testing	L				
	481	Edward	Moore	L				
	487	Enrico	de Klerk	L				
	410	Grant	Fisher	L				
	478	Irek	Timergazi					
	416	Jason	Cullum					
	417	Jason C	Softphone					
	458	Joanne	Price					
	457	Joanne	Hulme					
	420	Keren	Schade					
	472	Kevin	Plumpton					
	471	Kevin	PlumptonSoftphone					
	488	Mark	van Dijk 📃	-				
			► .					

You can send a voicemail, SMS or email from this form.

To send a Voicemail message

Select the Voicemail Message checkbox.

Extensions / Distribution Groups

These are the available mailboxes you can send a message to.

To select different extensions, hold down CTRL and click the names you want to send the message to. This can be a combination of extensions and groups.

	Extn	First Name	Last Name	Grou	IP	Description
	0	Operator	Operator		ALL	
	9443	Grant	Petersen	050	Ser	vice
7	9444	Grant	Petersen			
	9445	ATA	Line 2			
~	9446	Sharon	Brodie			
~	9447	Andrew	Richards			
	9448	Roy	Bates			

Subject

The subject that you type in here will be the subject heading on each recipient's voicemail notification (either in IPFX Live Desktop, IPFX for Outlook or IPFX for Lotus Notes).

When

You can send the message immediately or set it for future delivery.

Click **Future** to change the date for sending. You can only select up to three months in advance (for longer, see your voicemail guide).

Options

Messages can be sent with a variety of options that let you control how the message is used.

- Urgent By sending the message as urgent, it will have priority over all other messages within voicemail. If listening to your messages remotely, two dings at the start of the messages will signify that the message is urgent.
- Private When you mark a message as Private, it will announce to the extension listening that it is private and cannot be forwarded to anyone else.
- Return Receipt When the recipient has opened the message, you will receive notification that it has been listened to.

This will be sent back to you as a voicemail Message.

Controls

To Record the message, click on the Record Button. Your phone will ring and after two rings will play a high/low pitch indicating that you can start to record your message.



When the message has been recorded, you can click on the Play button

and listen to the message before you send it.

Play

Your phone will ring and play the message back to you. If you are still off hook, you can press play and listen to the message immediately.

You can stop the message at any time by clicking on the Stop button.



To send the message, click on the Send button.

Send

To Send an SMS Message



- 1. Select SMS Message checkbox.
- 2. Select Extensions or Groups you wish to send the SMS to.
- 3. Select Send.
- 4. Enter your message details.
- 5. Select Send.

Note The recipient must be able to receipt SMS messages. Remember your company must have an SMS Gateway set up for this to work.

To Send an Email

Same as SMS, but for Email.

Note When selecting Distribution Groups, please note that if you wish to edit these groups, please refer to Edit/Change Personal Distribution Groups.

See Also

Send a message What is "Sending a Message?"

Directory

This section explains the options available when you click on **Directory** on the IPFX Live Desktop Toolbar.

In This Section	
What is the Directory?	
Dialing from the directory	
Changing a Location Dialling Other Available	See Also
Numbers Conferencing	<u>IPFX Phone Control</u> <u>Toolbar</u>
<u>Chat</u>	Using locations
Setting a Callback	Voicemail
<u>SMS</u>	<u>Send a message</u>
Send an Email message from the Directory	<u>Queues</u> <u>Dial</u>
Extension Properties	Work Time
View Extension Images	<u>Contact</u>
Customized Printout	Record
Print Preview	Reports
Customizing the Directory in your IPFX Client	<u>Options</u>
Filtering the Directory	
Company Directory	

Personal Directory

What is the Directory?

The Directory shows all the internal extensions you can view, call, transfer to or hang-up from as well as Company Directory options. Each extension shows the status of the user by the icon next to their name. You are able to sort the extensions based on your requirements such as Location, Return Time and Department.

You can sort the Directory by name or phone number ascending or descending.

- 1. Click on a Column Header, a small triangle will appear.
- 2. Click again and the column will sort ascending or descending.

See Also
Directory
Dialing from the directory
Changing a Location
Dialling Other Available Numbers
Conferencing
Chat
Setting a Callback
<u>SMS</u>
Send an Email message from the Directory
Extension Properties
View Extension Images
Customized Printout
Print Preview
Customizing the Directory in your IPFX Client
Filtering the Directory
Company Directory
Personal Directory

Dialing from the directory

To dial from your Directory Listing

1. Click on the **Directory button** on the top toolbar.



The Directory will appear:

🔏 IPFX Live Desktop -	[Extension	304]			(
🕾 . 🖂 💈		m z.	1.0				
Location Voice Mail Send Directory Queues Dial Work Time Contact Record Reports							
General	Extens	ions [Techw <mark>r</mark> i	te01]				
	Extens	Title First Name	Last Name	Department	Location	Return	
	<u>72</u> 0	Operator	Operator		Queue	l	
Directory	🕋 301	Ms Fayola	Lawal	Management	Office	L	
	🖀 3 02	Ms Aynslie	Gill	Customer Service	Office	l	
	203 🕋	Mr Chu	Sau-Tung	Administration	Queue	l	
	雷 304	Ms Tayanita	Creek	Sales and Marketir	[,] Office	t	
Operator Operator (0)	齏 305	Mr Koorong	Jones	Finance	Office	l	
	7 306	Ms Noor	Hafeez	Research and Dev	Office	ļ	
	207	Mr Torometi Tuki	Para	Customer Service	Queue	l	
	4					•	
-	Personal Directory						
<u> </u>	 Description 	tion	Ωff	ice Mobile	e H	lome	
1 New Message				14/09/06	17:28	11.	

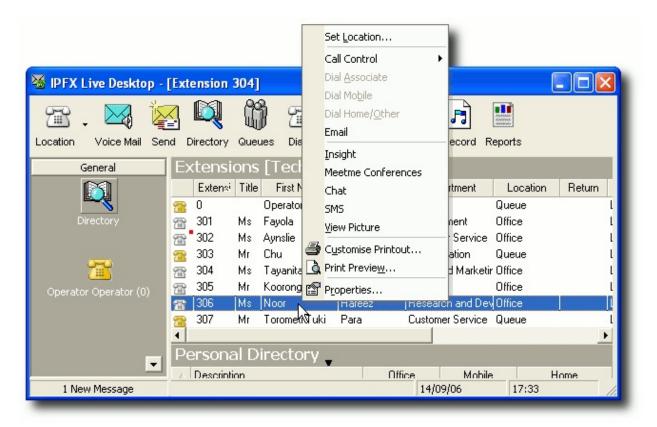
2. Double-click on the extension you require.

IPFX Live Desktop will dial the number and play the call through your phone.

or

Right click on the extension you require.

A short cut menu will appear:



Click Dial Associate, Mobile or Home/Other depending on your requirement.

or

Click Call Control.

Click **Dial.**

IPFX Live Desktop will dial the number and play the call through your phone.

Note: When dialling Associates, Mobile or Home/Other numbers - these will only be visible if they are set up in your or the users properties.

If on an Analog Extension, IPFX Live Desktop will call your phone first and when you pickup the handset, it will call the person you have selected.

See Also

Directory

What is the Directory?

Changing a Location

Dialling Other Available Numbers

Conferencing

<u>Chat</u>

Setting a Callback

<u>SMS</u>

Send an Email message from the Directory

Extension Properties

View Extension Images

Customized Printout

Print Preview

Customizing the Directory in your IPFX Client

Filtering the Directory

Company Directory

Personal Directory

Changing a Location

To change a location, please refer to <u>Changing another extension's</u> <u>Location - Directory</u>.

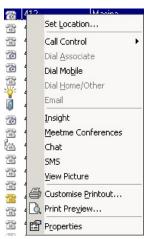
See Also
Directory
What is the Directory?
Dialing from the directory
Dialling Other Available Numbers
Conferencing
Chat
Setting a Callback
<u>SMS</u>
Send an Email message from the Directory
Extension Properties
View Extension Images
Customized Printout
Print Preview
Customizing the Directory in your IPFX Client
Filtering the Directory
Company Directory
Personal Directory

Dialling Other Available Numbers

You can dial other numbers associated with the extension such as their associate, mobile or home.

To dial another number associated with an extension

1. Right click on the extension and select the number required from the shortcut menu:



Note Only numbers set up in Extension Properties will be visible.

See Also

Directory

What is the Directory?

Dialing from the directory

Changing a Location

Conferencing

<u>Chat</u>

Setting a Callback

<u>SMS</u>

Send an Email message from the Directory

Extension Properties

View Extension Images

Customized Printout

Print PreviewCustomizing the Directory in your IPFX ClientFiltering the DirectoryCompany DirectoryPersonal Directory

Conferencing

Note1: IPFX Director will only support up to 5 Conferences (including Meet Me Conferences) totaling no more than 30 parties in all. If there is a requirement for any more than 5 Conferences at a time, then a dedicated IPFX Conference Server is required.

Note2: On the Cisco CallManager platform, a maximum of 3 participants may take part in a conference call.

Note3 You cannot join two conferences together. If you do attempt to do this, you could cause a connected party to be disconnected from the Conference call.

To Conference a party into a Conversation

- Whilst on the call, select Call Control.
- Select Conference.
- Enter the extension or number you wish to conference in.
- Your current caller will be held with Music on Hold (as per music setup requirements).

Note If party A and B are in a call, and A brings in a new party, then B hears music on hold. If party A-B-C are in a conference, and A brings in a new party, then B-C are still able to continue conversation. If party A-B-C-D are in a conference, and A brings in a new party, then B-C-D are still able to continue conversation, etc...

There are two options "Conference Join" and "Conference Reject". The initiator of the Conference does not need to wait for the new party to answer before selecting 'Conference Join' (though it is recommended that they do). When the initiator calls the new party, they will be able to talk together until the initiator selects 'Conference Join' at which point they are part of the full Conference Call and can converse with all parties. 'Conference Reject' will reject the the call you have on line and allow you to go back to the parties already in the Conference.

See Also

Directory

What is the Directory?

Dialing from the directory

Changing a Location

Dialling Other Available Numbers

<u>Chat</u>

Setting a Callback

<u>SMS</u>

Send an Email message from the Directory

Extension Properties

View Extension Images

Customized Printout

Print Preview

Customizing the Directory in your IPFX Client

Filtering the Directory

Company Directory

Personal Directory

In This Section

Meet Me Conferences

Meet Me Conferences

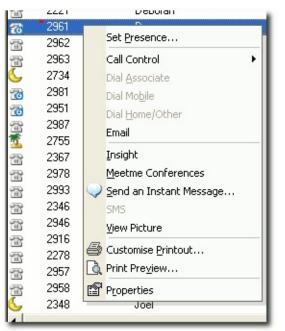


Meet Me Conferences enables you to set up a Conference on a date/time that will either:

- Call users to Conference them in at the date/time specified, or
- Allow users to call into the Conference with a password.

To Set up a Conference

- Select Directory from the main toolbar.
- Right click on the extension you wish to set up a Meetme Conference with.
- Click Meetme Conferences.



- Click Add from the Screen to add a Conference setting.
- Name your Conference.

😢 Meetme Conferences	×
Mon Tue V 25 26 2 3 9 10 16 17	Details Conference ID: Start Time: Record Play Announcements Onference Start Time May 2005 Ill Ill
30 31 Add Edit Delete	1 2 3 4 5 2:30 PM 2:45 PM

- Select the date and time you would like your Conference time from the Popup calendar.
- It will automatically enter a new Meet Me Conference ID in the left window pane, i.e.

😢 Meetme Conferences		2
Meetme Conferences for 418 1141 1144 1152 1155 1168	Details Conference ID: 1168 Start Time: 19/05/2005 13:00:00	ements
	Email Address: Password: Password Attendees	
	Name Number	Number Type
Add Edit Delete	QKCanc	<u>Select</u>

• Click the Select button to add attendees. The screen below displays:

Meetme Conference Attendees
Attendees Details
Conference ID: 1170
Description: Conference 1170 on 2005-05-19 at 13:00
Contacts Extensions Contact Groups Other
Personal Contact
Select
Company Contact
<u>Cr</u> eateSelect
OK Cancel

- You can click Create to create a new contact as an Attendee (or select from your existing Personal or Company Contacts).
- If you want to invite an existing contact (this example is using the Extensions tab), highlight the name(s) of the Attendees and click the > arrow to select them. This will populate the right-hand window pane. When all Attendees selected, click OK.

Select Extensions		
ieneral X Select Extensions		
Available: 201 - Shereefa Galal 205 - Sydney Build Area 206 - Sydney L1 Kitchen 208 - Sydney Brdrm 209 - Bill Gates	Selected: 220 - Jude Rhodes 221 - Deborah Harcourt	
210 - Justin Martin 211 - Larry Ellison 230 - Vaughan Klein 231 - Rodney Anderson 232 - Boris Cortes 240 - Ken Deacon		
241 - Luke Sheaves 242 - Martyn Gridley 243 - Robert Watson 244 - Dean Morters 245 - Daniel Gallagher	_	
	OK Cancel	J

• This screen appears:

🔀 Meetme Conference Attendees 🛛 🛛 🔀
Attendees Details
Conference ID: 1168 Description: Conference 1168 on 2005-05-19 at 13:00
Contacts Extensions Contact Groups Other
Extension
220 - Jude Rhodes
221 - Deborah Harcourt
OK Cancel

- Click OK.
- The Contact will appear as an Attendee as shown on the screen below.

😻 Meetme Conferences			×
Meetme Conferences for 418	Details Conference ID: 1168 Start Time: 19/05/2005 13	3:00:00	
1155 1168	Email Address:		_
	Password: Password		
	Attendees	Number	Number Turne
	Name The Jude Rhodes The Deborah Harcourt	220 221	Number Type Extension Extension
Add Edit Delete			Select
	<u></u> K	Cancel	Apply

• Select the Record checkbox if you wish to record the Conference.

- Enter the email address of where you wish the recording to be emailed to.
- You can set a password for users who call into the Meetme Conference number to enter when joining the conference.
- Click OK.
- To Add Random Numbers to this Conference
- Select Other Tab.
- Double Click in the line to enter the number you wish to include.
- Click OK.
- To Dial into a Meetme Conference
- The Conference facility will automatically call each attendee at the date/time advise of the conference.
- When an attendee is called they will be asked to enter the Conference ID followed by the # key.
- You may be asked for a password if so, enter the password followed by the # key.
- You will be asked to record your name followed by the # key this is then announced to the conference parties when you enter the conference.

Note If an attendee does not enter the Conference ID within 5 seconds the call will be hung up to ensure that it does not connect to voicemail. The attendee will then have to dial into the conference by dialling the dedicated extension or DDI for the Meetme Conference (your Administrator will advise you of this number). Please also note that you can only dial into an active Meetme Conference at the specified date and times of the conference. To view Meetme Conference details - right click on the extension that has set up the Conference within the Directory. Meetme Conferences are deleted after the specified date and time.

See Also

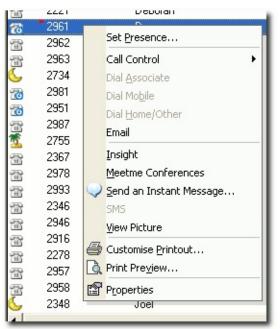
Conferencing

Chat

Chat enables you to chat online with another internal user.

To Chat online

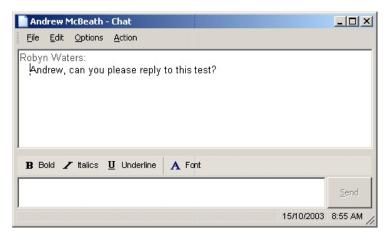
- Click into your Directory from the Main Toolbar.
- Right click on the user you wish to chat with in the Directory listing



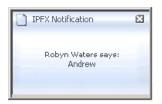
Click Chat.

The screen below displays.

	And	rew N	1cBeath -	Chat					
	Eile	Edit	Options	Action					
Г									
L									
L									
L									
L									
	n D.	ل امار	r Helies	U Underline					
-				_					
A	ndre	w, ca	n you ple	ease reply	to this t	est?			<u>S</u> end
							15/10/	2003	8:55 AM



- Type your chat conversation into the bottom section.
- Click Send.
- An 'Alert' notification will populate the screen of the user you sent your chat to as follows:



 When the user in question replies, you will receive a text reply within your screen as follows:



 You can continue the chat conversation by entering information and clicking the Send key.



Dialing from the directory

Changing a Location

Dialling Other Available Numbers

Conferencing

Setting a Callback

<u>SMS</u>

Send an Email message from the Directory

Extension Properties

View Extension Images

Customized Printout

Print Preview

Customizing the Directory in your IPFX Client

Filtering the Directory

Company Directory

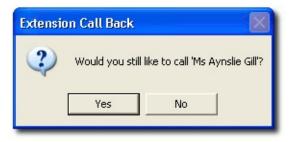
Personal Directory

Setting a Callback

If the extension you are dialling is busy or on a location, you will be asked if you wish to leave a Callback. If you select 'Yes', when the extension is free you will be prompted to call the extension. If you select 'No', you will be connected to that extension's voicemail.

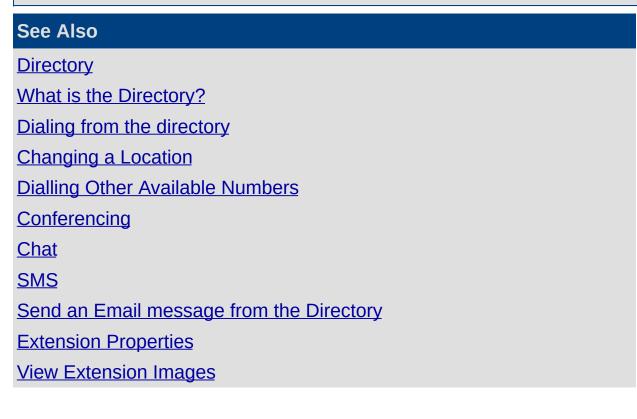
To set a callback

 Right click on the extension and click Callback. When the person is free a Screen Pop will appear to ask if you still want to call the extension you set the Callback on.



2. Click **Yes** to call, or **No** to cancel.

Note The Set Callback option is only visible when a dialled extension is unavailable.



Customized Printout

Print Preview

Customizing the Directory in your IPFX Client

Filtering the Directory

Company Directory

Personal Directory



If SMS messaging is enabled, you can send a message to multiple mobile phone numbers as long as you separate each number with a semi-colon (;), i.e:

Multiple Recipients (3) - 5M5	- D ×
Eile Edit Options Action	
A Font Urgent	
To: +6421316949;+6421316950;+6421316951;	
Meeting today at 1pm is cancelled	Send
Characters remaining: 127	1.

See Also

Directory

What is the Directory?

Dialing from the directory

Changing a Location

Dialling Other Available Numbers

Conferencing

<u>Chat</u>

Setting a Callback

Send an Email message from the Directory

Extension Properties

View Extension Images

Customized Printout

Print Preview

Customizing the Directory in your IPFX Client

Filtering the Directory

Company Directory

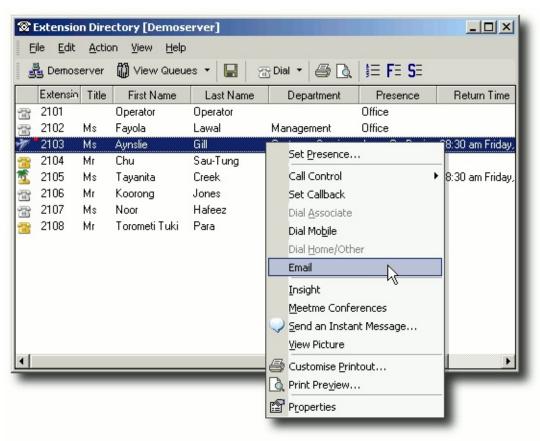
Personal Directory

Send an Email message from the Directory

How to send an Email message from the Directory

Note For this function to work the selected extension must have an email address associated to it.

- Click on the Directory button on the toolbar. The Directory will display.
- 2. Right click on the required extension to display the Contacts Menu.



3. Select Email.

A new Email screen using your default email client will display.

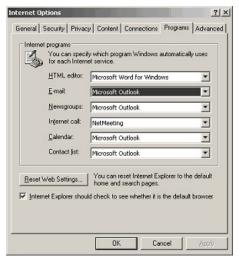
Note: In the IPFX Console client the 'Enable Directory Context Menu' in the Configuration\Settings Tab must be turned on.

If your default email client does not display, check the following

1. Open Start\Control Panel\Internet Options

The Internet Options Screen displays.

2. Select the Programs tab as shown below.



Your default email client type will display in the email field.

- 3. Use the drop-down menus if any changes are required.
- 4. Click OK.

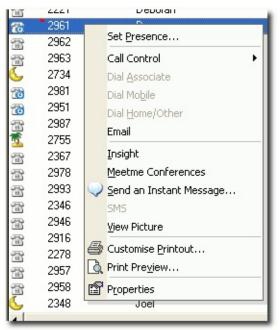
See Also
Directory
What is the Directory?
Dialing from the directory
Changing a Location
Dialling Other Available Numbers
Conferencing
<u>Chat</u>
Setting a Callback
<u>SMS</u>
Extension Properties
View Extension Images
Customized Printout
Print Preview
Print Preview

Customizing the Directory in your IPFX Client Filtering the Directory Company Directory Personal Directory

Extension Properties

To change the extension properties

1. Select an extension from the directory, then right-click to bring up the context menu:



2. Click **Properties** to display the Properties screen as shown below.

Extension:	418	Туре:	Digital Exte	ension	-
Tenant:	1	200	Je ignerente	_	_
MAC Address:			_		
8	(Title)	(Eirst)		(<u>S</u> urname)	
<u>N</u> ame:	Ms Angie Wilson			ilson	
<u>E</u> mail:	angie.wilson@pe	rform-sol.com			
LCD Name:	Angie Wilson		(Max 16	characters)	
Position:	Communications I	Manager		Show in <u>D</u> irectory	ļ
<u>U</u> ser level:	Administrator			I	
Department:	(none)		•		
Region:	Auckland		-	lmage	·

- 3. Enter or alter details as required.
- 4. Click OK.

Note The Properties option is not available to Users except for their own extension. Many of the setup features shown here are unavailable for them to change or amend on other extensions. For further information on your extension properties, please refer to the Extension Properties section in this manual. For Administrator functionality, please refer to you Administrator.

See Also

Directory

What is the Directory?

Dialing from the directory

Changing a Location

Dialling Other Available Numbers

<u>Conferencing</u>

<u>Chat</u>

Setting a Callback

<u>SMS</u>

Send an Email message from the Directory

View Extension Images

Customized Printout

Print Preview

Customizing the Directory in your IPFX Client

Filtering the Directory

Company Directory

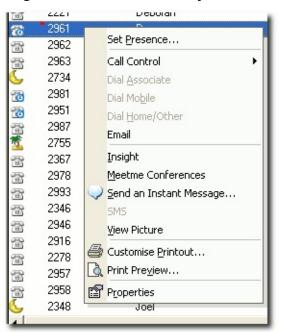
Personal Directory

View Extension Images

View Picture enables you to view a picture of the user of the selected Extension number.

Click into your Directory from the Main Toolbar.

Right click on the user you wish to view.



Select View Picture.

The user's picture displays.



To embed your Image

- Select Location Properties from your IPFX Client.
- Click the 'Image' button.



• This allows you to embed a small picture of yourself into the Call Alert popup, so that when you call other users they get a picture of

you as well as your details. By selecting this Image button, you can browse to find in which directory your image resides.



See Also

Directory

What is the Directory?

Dialing from the directory

Changing a Location

Dialling Other Available Numbers

Conferencing

<u>Chat</u>

Setting a Callback

<u>SMS</u>

Send an Email message from the Directory

Extension Properties

Customized Printout

Print Preview

Customizing the Directory in your IPFX Client

Filtering the Directory

Company Directory

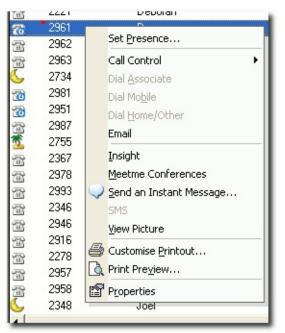
Personal Directory

Customized Printout

Customized Printout allows you to print out a Directory List and format as per your requirements.

To Customize a Directory Printout

- Select Directory from the main toolbar.
- Right click on your extension within the Directory.



Select Customize Printout...

S C Proylem	Print 🖸	Apply *	Z Add Elber					
Z Extension		Column	Openator			Value		
Z FistName								
Z Last Name	1							
2 Department	1							
Location 2	1							
Betum Time	1							
Mobile								
Region								
Server	1				_			
	Extension	First Name	Last Name	Department	Location	Return Time	Mobile	Region_
	0	Operator	Operator		Office			
	410	Gnant	Futer	Channel Sales	Office		021757600	Auckland
	411	Tony	Hartigan	Service	Queue			Aucklary
	412	Matina	Maher	Financial	Office			Auciklan
	413	Danian	Coventry	C++	Office			Aucillan
	414	Mark.	Walker	VB	Office		021 21 66 041	Aucklan
	415	Gierre	Nacdonald	Quality Assurance	Office		0211664346	Aucklan
	416	Don	NacKenzie	VB	Office		0212532975	Aucklan
	410	Robyn	Waters		Office		021542050	Aucklan
	419	Kylie	Shipley	Project Nanagement	Gone Out	01:00 pm Tamperove	021412409	Aucklan
	450	Roy	Bate:	Service	Queue			Aucklani
	451	Neil	Gibsan	Financial	Office		021620295	Aucklary
	452	Natalia	Bel		Office		0211615755	Aucklan
	453	Grank	Peterten	Qually Assurance	Office		025922691	Aucillan
	111	Cusio	CAL	C++	Office			division.

- This screen allows you to select the fields you wish to display in your printout by selecting the checkbox beside the field name.
- Make your selection and click Apply.

The bottom right hand side of the screen will display your required

settings and you can view the field contents. If you wish to reselect, do so and click Apply again.

To Add a Filter to your Customized Printout

- Click Add Filter from the Toolbar menu.
- The right hand top screen will now display a column, operator and value field for you to select from.
- Select the drop-down menu and select the filter you wish to apply, eg: Column = the field name, Operator = variable to filter with, Value = the value you wish your filter with use.

Ø.	Extension		olumn .	Openator			Value		
	Fast Name						T ISANS		
	Last Name		-						
	Department								
	Location								
	Betum Time								
~	Mobile								
	Region								
	Server	4							
		Extension	First Name	Last Name	Department	Location	Beturn Time	Mobile	Region_
		0	Operator	Operator		Office			_
		410	Gnant	Futer	Channel Sales	Gone Out	01:00 pm Today	021757600	Auckland
		411	Tony	Hartigan	Service	Queue			Aucklane
		412	Matina	Maher	Financial	Office			Aucitlan
		413	Danian	Covenity	C++	Office			Aucillan
		414	Mark.	Walker	VB	Office		021 21 66 041	Aucklan
		415	Glenn	Nacdonald	Quality Assurance	Office		0211664346	Aucklan
		416	Don	MacKenzie	V8	Office		0212532975	Aucklan
		418	Robyn	Waters	Documentation	Office		021542050	Aucklan
		419	Kylie	Shipley	Project Nanagement	Gone Out	01:00 pm Tamorow	021412409	Aucklan
		450	Reg	Bates		Queue			Aucklan
		451	Neil	Gibcan		Office			Aucklan
		452	Natalia	Bel		Office			Aucklane
		453	Glank	Petetten	Quality Assurance	Office		025922691	Aucillan

- When all selections are set, click Apply.
- Your selection will display in the Directory pane.
- Click Preview to view how your printout will display

This Feature	Does This
F ' / D	
First Page	Selects the first page of your printout
Previous Page	Selects the previous page of your printout
Next Page	Selects the next page of your printout
Last Page	Selects the last page of your printout
Zoom	Selection to increase/decrease view
Print	This is the printer selection to your organization network printers
Page	Details the page numbers and what page you are on within the printout

	Finishmer	Lations	Bepartment	Louise	Actual Text	10.00	Aught	Gener	
	CONTRACT	COLUMN .		050				APERINTERS.	
4	Gaut	Pasar	Channel Seiter	Gene Cart	in Of pa Totay	02479508	Assisted	ALCONTROL	
	700	PORIOR	Denke	OWNER			440394-3	AFERN/1711	
d l	the ba	Maker .	Parents	Othe			Andund	APERINTER'S	
		008757	C++	OTEN .				AFERING THE	
	that .	Pater	18	Office		0012100304		AREASTER	
		Marcoux1	CASE ASPERIO	0804		001004545		ALCONTROL	
H.	604	the seam	11	Office		001202615		A468+3791	
		208.0	Occurrent station	Office		00404008		ALCONTROL	
ri -	1.0	(NPA)			In OLDer Toxonoor	001410300		A4680-3751	
4		il des		Creat I				ALL BOTTON	
14	-	Sec.	Pareces	Office		00903036		AALBNERS	
9		6-8		Othe		001 B3 (7 10)		Assaults:	
1	Seat Casis	Pullion and Control of	Charle Astronomics Const	Critics Critics		02962011		AREBOTEST AREBOTEST	
		Los .	On merblie	Office		001100103		ALLENTAL	
		1980		Cella		0.10.0107		And Boy They	
		P.4e	Contact of	Colline I		or comparts		ALLEYTSE	
		Pases	Gente	Critic				Assession Theory	
8		Real (Deligner)		Colline I				ALLENTER	
9	1479	Progets	18	Cellin				Ast Boy Day	
9		Courty	Care .	0464				Assault for	
	date a	th-Seat	Gente	Othe		00102544		Ast Borlins	
54	int.	Tes taki	Cas .	Cellar.		OC UNIC ADV		Addition Theory	
	Citria	direction .	C++	OBA				ALLEVINE	
e	PA	Liphonet	10	Other		00114380	Assisted	ALL NOTING	
	ULat.	10.18	C++	otto		OCT WILDED	Asses	ALLEYTER	
N I	Pail .	line .	14	Other		021400088	Asting	ALCONTROL	
н	2.0	a		OBA				ALBOTH	
	CRI .	8		Other				ALL NOT THE	
	ULat.	161		otte				ALLEYTER	
11	BLAR.	COMING THIS		080			A4326-3	ALEVIN	

See Also

Directory

What is the Directory?

Dialing from the directory

Changing a Location

Dialling Other Available Numbers

Conferencing

<u>Chat</u>

Setting a Callback

<u>SMS</u>

Send an Email message from the Directory

Extension Properties

View Extension Images

Print Preview

Customizing the Directory in your IPFX Client

Filtering the Directory

Company Directory

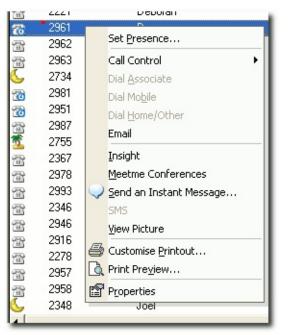
Personal Directory

Print Preview

Print preview takes you to a default view of the Directory printout.

To preview a Directory Printout

- 1. Select Directory from the main toolbar.
- 2. Right click on your extension.
- 3. Click Print Preview.



4. The following screen displays detailing your print preview of the Directory listing.

	First State	Laitar	Biguiterat	Louise	Arbo The		Argin	Gener		
	OPENING STREET	CON URS		050				APER042431		
		Pasar	Chara Hoster		it-Olge Toley	0.417508		ARE BOTTON		
	705	PORCH	Sente Financial	Creater Creater				AALBWYYYSI AALBWYYY		
	the bo	titale r								
	CONCR Mat	COB PT-	C++	CORES .		0012-0184		ARCENTERS .		
				ORX				ALL WATER		
	tine .	Marketta	CROMP ADDRESSOR	Office Office		00100456		ASTRO-TEST		
	Point I	Did to	Con marketing	Critica		0.100.015		And Boy Tree		
	1.8	0.041	Provide States of the spins of		Cold on Vincence			A		
	Page 1	Sales	Gentle	Creater Contra	and the second	1011-010		And Boy They		
	141	Sec.	Pances	Contra .		Colored -		445 Box 37 pr		
	No.	Red .		Celler		COMPACING.		And Boy They		
	6-tet	P-9-044	Chally Assessed	Office		00502011		441.00-370-		
	Cody	Kan	Cas	Other				144 Boy 77 or		
	Dates	and -	Oni energiblio	Other		00100000	Assistant	ALLENTRE:		
10	June a	1980	deper line spine et	Celles .		004400642	designal	and an other		
40	Julea	Pite	Center	Other			Antiput	ALLEY TRU		
	daile a	72400	Gente	Othe			Michain.	And Box Theory		
	Pail .	Basi (Selano)		Other			Antiput	ALLEY THE		
	1111	Pangets	14	Other				Art Boy Those		
	Cipila	Citerrity	6.00	Other				ARCENTRAL		
	dates.	Without 1	Genke .	Othe		00102064		Adden The .		
	int.	Terryal	Cas.	Other		004107409		ALL MONTH AND		
	Citrie	B10841	C++	OBA				ALLENTRE		
	P.4	Lipitent	N	Othe		001163881		ARCHINES .		
	ULat.	10.18	C++	OBA		OC1 WRITED		ALLEY TRU		
	Pail	lind .	W	(ella		024 60586		And Amerikan		
	28			Othe				ALLENTRA:		
	C.E.	161		Office				ALLENTRE:		
	ULAS.	COADE THE		OBA				AND DESCRIPTION OF THE OWNER		
							100000	ATTRACTOR .		

See Also

Directory

What is the Directory?

Dialing from the directory

Changing a Location

Dialling Other Available Numbers

<u>Conferencing</u>

<u>Chat</u>

Setting a Callback

<u>SMS</u>

Send an Email message from the Directory

Extension Properties

View Extension Images

Customized Printout

Customizing the Directory in your IPFX Client

Filtering the Directory

Company Directory

Personal Directory

Customizing the Directory in your IPFX Client

Customized Directory View allows you to customize the view of your Directory without affecting other users, eg: you wish to see the Directory columns in the order of extn number, first name, mobile number, position, instead of extn number, first name, last name, etc.

To customize your Directory view

- 1. Click the Locations Icon on the top toolbar
- 2. Click on the Settings icon
- 3. Click on the Properties button
- 4. Click on the Options Tab
- 5. The IPFX Options screen displays.
- 6. Click Directory Fields button
- 7. The Show Fields screen displays.
- 8. Add/Remove Fields/Columns as required and select the required order using the Move Up and Move Down buttons:

ihow Fields		\mathbf{X}
	uld like to show in your personal extens are required, and cannot be removed f	rom the directory view)
Available fields: Access Number Associate Birthday Building Location Home/Other Location Start Time Mobile Office Extension Pager	Add -> (Status Icon) *Extension Title *First Name *Last Name Position Department Location Return Time Region *Server Move Up	Move Down

9. Click Ok

The new layout will appear when you restart you client. on the next restart.

Note If you do not have access to this function, please see your IPFX Administrator.

See Also

Directory

What is the Directory?

Dialing from the directory

Changing a Location

Dialling Other Available Numbers

Conferencing

<u>Chat</u>

Setting a Callback

<u>SMS</u>

Send an Email message from the Directory

Extension Properties

View Extension Images

Customized Printout

Print Preview

Filtering the Directory

Company Directory

Personal Directory

Filtering the Directory

Filtering allows you to display only those directories entries that match a specific value in a particular field. For example, you may wish to view only extensions that belong to the Finance department or only extensions currently set to the Office Location. Any of the directory's columns can be used as the basis of a filter.

To Filter an Extension

- 1. Right-click on the heading of the column that contains the information you wish to filter.
- 2. From the context menu, select the characteristic of the extensions you wish to display:
- 3. The directory will only display extensions matching the characteristic you have selected.

Filters can be combined by repeating these steps on different columns. For example, by filtering the **Location** column for "Office" and the **Department** column for "Finance" you can display a list of all Finance staff currently at their desk.

To Remove Filters

 Right click on any column header in the directory and select Clear All Filters from the context menu.

See Also
Directory
What is the Directory?
Dialing from the directory
Changing a Location
Dialling Other Available Numbers
Conferencing
<u>Chat</u>
Setting a Callback
<u>SMS</u>

Send an Email message from the Directory Extension Properties View Extension Images Customized Printout Print Preview Customizing the Directory in your IPFX Client Company Directory Personal Directory

Company Directory

See Also

<u>Directory</u>

What is the Directory?

Dialing from the directory

Changing a Location

Dialling Other Available

Numbers

Conferencing

<u>Chat</u>

Setting a Callback

<u>SMS</u>

Send an Email message from the Directory

Extension Properties

View Extension Images

Customized Printout

Print Preview

Customizing the Directory in your IPFX Client

Filtering the Directory

Personal Directory

In This Section

What is the Company Directory?

Dialling from your Company Listing

Transferring a Call to the Company Directory

What is the Company Directory?

The Administrator can set up a Company Directory that all staff can use for quick key calling.

You can sort the Directory by name or phone number ascending or descending.

- Click on a Column Header, a small triangle will appear.
- Click again and the column will sort ascending or descending.

Description	Phone number	7	
🔝 DHL (cust serv)	6365000		
🔝 Sloane Hydranger	6230990		
🔚 Non Urgent Ambulan	5799099		
🔜 Starchi Starchi	5355760		
🔝 NZ Drycleaners	5244089		
🔚 Green Drycleaners	5222112		
🔚 Cushla Williams	476		
📰 Hospital	3797440		
Sheraton	3795532		

See Also

Company Directory

Dialling from your Company Listing

Transferring a Call to the Company Directory

Dialling from your Company Listing

To dial from your Company Directory

• Double-click on the speed dial number you require.

IPFX Live Desktop will dial the number and play the call through your phone.

or

• Right-click on the speed dial number you require.

A short cut menu will appear.

Dial Office Dial Mobile Dial Home Transfer Hangup	
New Contact Edit Contact. Delete Conta	

Click Dial.

IPFX Live Desktop will dial the number and play the call through your phone.

Note: If on an Analog Extension, IPFX Live Desktop will call your phone first and when you pickup the handset, it will call the person you have selected.

See Also

Company Directory

What is the Company Directory?

Transferring a Call to the Company Directory

Transferring a Call to the Company Directory

To transfer your current call to external party listed in the company directory:

1. Right-click on the speed dial number.

The short cut menu will appear:

Dial Office
Dial Mobile
Dial Home
Transfer
Hangup
Hangup New Contact

2. Click Transfer.

IPFX Live Desktop will dial the number and play the call through your phone.

You will be able to talk to the second party but all three parties will not be able to talk to each other unless you are in conference mode (see voicemail User Guide).

Note If you choose to transfer one external party to another external party, then the call will use two trunk lines. (One for the internal call and one for the external call). Those two parties will continue to be routed through your PABX until their conversation is terminated.

See Also

Company Directory

What is the Company Directory?

Dialling from your Company Listing

Ending the Call

To end the call

Hang up the phone,

or

Click **Hang up** on the top toolbar.

or

Right-click on the extension and click **Hang up** from the shortcut menu.

See Also

Company Directory

What is the Company Directory?

Dialling from your Company Listing

Transferring a Call to the Company Directory

Personal Directory

Individual users can set up their own Personal Directory listing that only they can access.

You can sort the Directory by name or phone number - ascending or descending.

- Click on the Column Header, a small triangle will appear.
- Click again and the column will sort ascending or descending.

Personal Directory	•		
	72588	Mabile 021685956 021 556895	09.6546855
			See Also
			Directory
			What is the Directory?
			Dialing from the directory
			Changing a Location
In This Sectio	n		<u>Dialling Other Available</u> <u>Numbers</u>
Accessing Pers	<u>sonal</u>		<u>Conferencing</u> <u>Chat</u>
<u>Dialling from ye</u> <u>Listing</u>	our Pe	rsonal	<u>Setting a Callback</u> SMS
Transferring a	Call		Send an Email message
Ending the Cal	l		from the Directory
Adding / Editin	g a Ne	<u>w</u>	Extension Properties
<u>Contact</u>			View Extension Images
			Customized Printout
			Print Preview
			Customizing the Directory in your IPFX Client
			Filtering the Directory

Company Directory

Accessing Personal Directory

- Click on the **Directory** button on the top toolbar. The Directory screen will display.
- Click on the arrow beside the Sub Screen heading.
 A drop-down box will appear.

3. Click on **Personal Directory**.

The Personal Directory will appear.

Personal Direc	tory	357		
Personal Directory	ffice	Mobile		Home
Company Directory	8			
💷 Jim Jones	09 3572589	021885956	09 6546655	
Sally Jones	09 3577789	021 556895		

See Also

Personal Directory

Dialling from your Personal Listing

Transferring a Call

Ending the Call

Adding / Editing a New Contact

Dialling from your Personal Listing

To dial from your Personal Listing

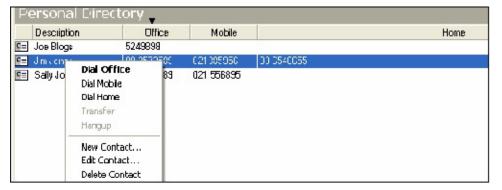
Double-click on the speed dial number you require.

IPFX Live Desktop will dial the number and play the call through your phone.

or

• Right-click the speed dial number that you require.

The shortcut menu will appear:



Click **Dial** for the appropriate number required.

IPFX Live Desktop will dial the number and play the call through your phone.



Transferring a Call

If required, you can transfer your current call to another external party.

To transfer a call

• Right-click on the speed dial number.

The shortcut menu will appear.

Personal Directory							
Description Of		Offic	в	Mobile			Home
💶 Joe Blog		5249898					
💷 Jm.cn	Dial Offic	100.05505	90	021005050	00 0540055		
🖭 SallyJo	Dial Mobile Dial Home Transfer Hangup		89	021 556895			
	New Conta Edit Conta Delete Cor	ct					

2. Click Transfer.

IPFX Live Desktop will dial the number and play the call through your phone.

You will be able to talk to the second party but all three parties will not be able to talk to each other unless you are in conference mode (see voicemail User Guide).

Note: If you choose to transfer one external party to another external party, then the call will use two trunk lines. (One for the internal call and one for the external call). Those two parties will continue to be routed through your PABX until their conversation is terminated.

See Also

Personal Directory

Accessing Personal Directory

Dialling from your Personal Listing

Ending the Call

Adding / Editing a New Contact

Ending the Call

To end the call

Hang up the phone

or

• Click Hang up on the top toolbar

or

• Right-click the extension and click **Hang up** from the shortcut menu.

See Also

Personal Directory

Accessing Personal Directory

Dialling from your Personal Listing

Transferring a Call

Adding / Editing a New Contact

Adding / Editing a New Contact

To Add a new Contact

- 1. Right-click on the Personal Directory Listing.
- 2. The shortcut menu will appear.
- 3. Click New Contact

To Edit an existing Contact

- 1. Right-click on the Personal Directory Listing.
- 2. The shortcut menu will appear.
- 3. Click Edit Contact

See Also

Personal Directory

Accessing Personal Directory

Dialling from your Personal Listing

Transferring a Call

Queues

This section explains the options available when you click on **Queues** on the IPFX Live Desktop Toolbar.

	See Also
In This Section	IPFX Phone Control
What is a Queue?	Toolbar
Viewing Queues	Using locations
Viewing Queue Agents and	<u>Voicemail</u>
Call Flow	Send a message
Viewing Queue Calls	Directory
Queue Pickup	Dial
Last Agent to Log out of Oueue Notification	Work Time
Queue Hold	<u>Contact</u>
Queue Control	Record
Queue Properties	Reports
	<u>Options</u>

What is a Queue?

A queue is an extension on the PABX, which directs incoming calls to the queue agents in a IPFX Contact Centre environment. When a call comes into the queue, it is managed by the queuing system and coordinated based on the queue settings.

The administrator can configure Queue Agents, Priority/Service levels, Grade of Service, Schedules, Announcements etc, based on the requirements of the IPFX Contact Centre.

An IPFX Supervisor Agent can administer queue settings, however, if you have multiple Queues and Supervisors, you may want to password protect the queues so they can administer their own Queues only.

Note You must have purchased the IPFX Contact Centre module for this to be enabled.

See Also

<u>Queues</u>

Viewing Queues

Viewing Queue Agents and Call Flow

Viewing Queue Calls

Queue Pickup

Last Agent to Log out of Queue Notification

Queue Hold

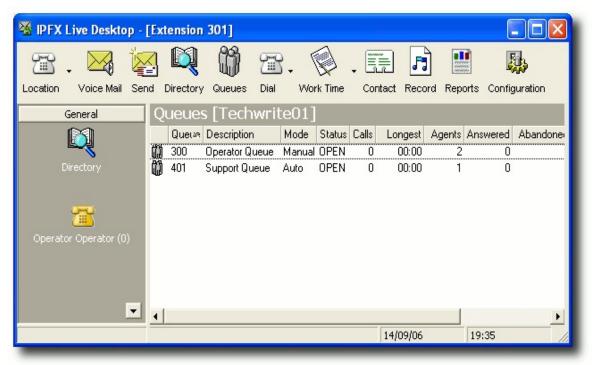
Queue Control

Queue Properties

Viewing Queues

To view Queues

- 1. Click the **Queues** icon on the toolbar.
 - ij
- 2. The Queues screen will appear:



Across the top of the queues are the Column Headers.

3. Select the column of your choice by clicking in the Column Header to sort ascending or descending.

A description of the columns is set out below.

Queue

This is the queue pilot reference number allocated to the queue.

Description

General description of the queue. Usually relates to the queue/user requirements. i.e. Helpdesk, Sales Support.

This description will also populate an LCD Message on a Dterm (dependent on PABX), or a users screen pop to differentiate which queue

a customer is calling from.

Mode

Mode indicates whether the queue is automatically or manually opened.

- Automatic will open/close and forward the queue based on the queue schedules.
- Manual indicates the auto setting has been manually overridden to forward to another Queue or Message Box.

When in Manual mode, the specified schedule times will not be adhered to.

Queues will stay in manual mode until reset to auto.

Status

Open, Closed, Forward Queue, Forward to Message. Displays the queues real time status.

Calls

How many calls are waiting in the queue at that time.

Longest

The longest time a call has been waiting in the queue, at a given time.

Agents

How many agents are logged into the queue at that time.

Answered

Number of calls that have been answered in the queue over that day.

Abandoned

Number of calls that have been abandoned from the queue over that day.

Only calls that are abandoned after a certain minimum time period are counted, in order to exclude accidental calls from the statistics (i.e. wrong numbers etc.) The default minimum period is 5 seconds, but can be changed by the queue Administrator.

Other

 A call which comes in on a queue, gets a message box as a queue announcement and then gets transferred to another destination other than the original queue from the message box.

 A call which comes in on a queue and gets manually picked up by someone not logged into the queue i.e. a supervisor.

GOS

Current (GOS) Grade of Service Level for queue.

Server

In a networking scenario, all the queues visible for each networked site. (i.e. Auckland, Wellington, Sydney.)

See Also
Queues
What is a Queue?
Viewing Queue Agents and Call Flow
Viewing Queue Calls
Queue Pickup
Last Agent to Log out of Queue Notification
Queue Hold
Queue Control
Queue Properties

Viewing Queue Agents and Call Flow

You can view individual Queue Agent performance and Call Flow for each queue.

Oucue Nore

Double click on the queue required.

	5 80100	e Mail Sup	pore (-								Queue Statisti
Agents=1		Calls=0 [00:00]		Calls Max=1 [00:02]	G05=0%	6	Ans=6	5	Abn=0		
T Extr	First name	Last name	Location	Time	Answered	Avg Talk	Access	Skill	Entry Time	Entry Count	
🛱 457	Joanne	Hulme	Office		0	00:00	Auto	1	Instant	Instant	D
63 453	Grant	Petersen	Office		0	00:00	Auto	9	Instant	Instant	11
@ 458	Joanne	Price	Office	•	4	01:14	Auto	9	Instant	Instant	
7 476	Andrew	McBeath	On Holida	y 08:30 an 28/04/2003	0	00:00	Auto	9	Instant	Instant	82 - 49
B 459	Andrew	Richards	Office		0	00:00	Auto	9	Instant	Instant	Agent
∰ 452	Natalia	Bell	Office		0	00:00	Auto	2	20 Secs	3	≻Information
@ 413	Greg	Weeks	Office		0	00:00	Auto	9	Instant	Instant	
@ 411	Tony	Hartigan	Office		2	01:30	Auto	9	Instant	Instant	
@ 414	Duncan	Miler	Office		0	00:00	Q Pickup	None	Never	Never	
🗟 450	Roy	Bates	Office		0	00:00	Q Pickup	None	Never	Never	
@ 415	Glenn	Nacdonald	Queue		0	00:00	Auto	None	Instant	Instant	1/2

Top Segment	Shows all Agents (and their extensions), Location
of Queue	of each Agent, the Calls answered by each Agent,
Details	Average Talk time and Agent status.

A white telephone shows an Agent is in the office but NOT logged into Queue.

A yellow Telephone shows an Agent is logged into Queue and is available to take queue calls.

A yellow telephone with a clock on the top right hand corner shows an agent who is temporarily logged out (on "Away Status") of the queue. When the Agent moves the mouse or uses the keyboard, this icon automatically reverts back to the Queue location. While on "Away Status" queue calls will not be delivered to the agent.

To set the Away Time Status, please refer to CTI Options.

Supervisors can see how busy the Queue is and can log in more agents or change the priority of this queue.

See Also
<u>Queues</u>
What is a Queue?
Viewing Queues

In This Section

Queue Name

Queue Statistics

Agent Information

Viewing Queue Calls

Queue Pickup

Last Agent to Log out of Queue Notification

Queue Hold

Queue Control

Queue Properties

Queue Name

Shows the Queue Name for quick reference.

See Also

Viewing Queue Agents and Call Flow

Queue Statistics

Agent Information

Queue Statistics

You can view your queue statistics without having to run reports.

Agents

Number of agents logged into the queue for the Call Item Type (eg: Calls, Emails, Callbacks, etc) versus how many agents are available if they log in to take calls.

Calls

Number of calls waiting in the queue to be answered and their waiting time.

Calls Max

Maximum number of calls in the queue at any time and the longest waiting time since queue reset (usually 2am).

GOS

Current Grade of Service level for the queue.

Ans (Answered)

Number of calls answered since the queue opened.

Abn (Abandoned)

Number of calls that have been abandoned from the queue.

i.e. Hung up after they 'entered' the queue.

Note: If calls abandon before the 5 second default time then they will not change the statistics. (See Queue Properties/Alarms).

Other

Manual selection of calls from the queue (ie. Supervisor picks up directly from queue) or call transferred out of the queue. Also includes calls to queue after Queue has closed.

See Also

Viewing Queue Agents and Call Flow

Queue Name

Agent Information

Agent Information

Extension

The agent's extension.

First Name

The agent's first name.

Last Name

The agent's last name.

Location

The agent's current location setting.

Return Time

The time the agent is due to return.

Answered

Number of phone calls the agent has answered for that queue.

Avg Talk

The average talk time for each call.

Access

The level assigned to the agent for queuing.

i.e. They may be set to Pick Up calls, instead of receiving them automatically.

Skill

Each agent is assigned a skill level from 1 to 9 depending on company requirements.

If an agent is skill level 9, then he/she will receive priority to answer the call over an agent with a skill level of 3.

Entry Time

Agents can be assigned a start time for a queue call that will enable the queue call to be delivered to their extension only after a call has been queuing for a specified timeframe.

Entry Count

Agents can be assigned an entry count for a queue call that will enable the queue call to be delivered to their extension only after a set number of calls have been queuing.

See Also

Viewing Queue Agents and Call Flow

Queue Name

Queue Statistics

Viewing Queue Calls

To check which calls are currently in the queue either answered or queuing

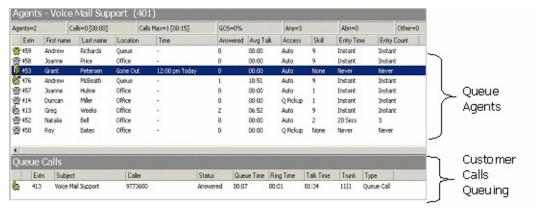
• Click on the **Queues** icon on the top toolbar.

or

Bottom

Double-click the queue you want to view.

The bottom half of the screen will show all current Queue Calls.



All Calls Queuing including:

Status of Call, Status, Queue Time, Ring Time, Talk Time, Wrapup Time, Trunk, Customer Calling

(e.g. The telephone number or Description of Caller if in contacts and Caller I.D. is enabled on your system).

Segment of Queue Details If a purchased Module, this segment can also include different forms of media such as Fax Queuing, Email Queuing, Callbacks, etc. These are presented to Agents in the same way as a standard Call would be, with slight variations as noted in **Document Queuing** (see "" on page 86) and **How a Callback Presents itself** (see "" on page 88).

As the calls (or other forms of media such as Fax, Email or Callback) are presented to an agent, the telephone state will change real time to show

a red telephone. When the call is answered the caller status changes from Queuing to Ringing and the call, Callback, Fax or Email 'attaches' itself to an agent in the top segment of the screen. When a call is put on Queue Hold, the caller status changes to 'hold' and the icon status changes to a hand - see Queue Hold for further information.

Note: If an Agent is logged into the Queue (yellow telephone) and does not answer the telephone, the Call Centre will keep trying to send calls to this Agent if no other Agents are available.

It is important to **LOG OUT** of the Queue if you leave your desk, to prevent customers not getting announcements and to stop high ring times.

	See Also
	<u>Queues</u>
	What is a Queue?
In This Section	Viewing Queues
Queue Calls	Viewing Queue Agents and Call Flow
Document Queuing	Queue Pickup
How a Callback presents itself to an Agent	Last Agent to Log out of Queue Notification
	Queue Hold
	Queue Control
	Queue Properties

Queue Calls

Extension

The extension of the agent who has answered the call.

This will only show if the call has been answered.

Subject

The queue name that the caller came through.

Caller

If CLID (Caller Line ID) is enabled, the caller's number will show.

If the caller is listed in the Company or Personal Directory, his/her name or description will show.

Status

The status of the call i.e. Answered, Queuing, Released.

Queue Time

How long the call has been in the queue at present or was in the queue before being answered.

Ring Time

How long the call was ringing on the agents phone before being answered.

Talk Time

The length of conversation time.

Wrapup Time

The length of time the call was in wrapup mode. (Time elapsed from hangup until Agent available to accept another call).

Trunk

The trunk line the call came in on.

Туре

What the call type is, ie. Queue Call, Callback, Outbound, Webchat, etc.

See Also

Viewing Queue Calls

Document Queuing

How a Callback presents itself to an Agent

Document Queuing

Note This feature is only available if the IPFX Document Queuing - Email and Fax module is purchased

Documents routed to a queue are presented to logged-in Agents in the same manner as a normal phone call.

Queued documents are indicated by media-specific icons in the queue window. For example, e-mail messages are indicated by an envelope icon.

Documents at the head of the queue trigger an Accept/Decline pop-up window on the screen of the next available agent.

If the agent declines or does not respond to the pop-up window, the document will be returned to the queue for delivery to another agent.

If the agent accepts the document, the document is delivered to the agent's Inbox.

In order for an agent to receive e-mail or fax messages, the agent must be enabled in the appropriate media tab of the **Queue Properties > Agents Tab** screen.

Note IPFX recommends using Wrap ups to allow you to gauge the amount of time agents spend processing e-mail or fax messages.

See Also

Viewing Queue Calls

Queue Calls

How a Callback presents itself to an Agent

How a Callback presents itself to an Agent



When a Callback presents into the queue it will deliver to an agent like a normal call based on the settings a Supervisor sets up for access levels.

- The call will present on either the Popup Screen or when presented to the agent, voicemail will play the message to the agent and then ask the agent the following:
- Press 1 to Reply
- Press 2 to Reschedule
- Press 3 to Delete
- Press # to Accept (when # is selected, this will automatically dial out to the number the customer has entered).

Note All users MUST select a Wrapup Code after a Callback has been taken. If you do not require Wrapup Codes on Callbacks, please advise your Administrator so they can turn this default function off.

The toolbar above 'Caller Information' shows the above options that the agent can select from to do the same functionality as below.

Current Calls	<u>%</u> _ ≌	. 🔊 🔹	R . E	×
Contact ⊻iew Delete Ha ▶ Play ✔ Accept Ⅹ Delete	angup My Voice ⊕ Reschedule		Work Time Options	
From: Harry Potter	Reason: AQ1 -	Callback Queue	Queue Time: 01:23	
Caller	Status		Duration	
Wrapup codes:	Answered 0	0:36		
System	Code <u>1</u>		Description	
				Apply

Note Callback calls, when being distributed to an agent should be dealt with as a normal call would be, a callback call should NOT be hung-up or at any stage.

The correct procedure for handling callback calls is either:

Accepting the callback, or

 \bigcirc Rescheduling the callback for a later time.

If a callback call is hung-up on (without being rescheduled) the call will be placed back into the queue but will not keep its position in the queue.

See Also

Viewing Queue Calls

Queue Calls

Document Queuing

Queue Pickup

You can pick up a call from a queue and transfer it to any agent located on your side bar or in the queue group.

To pick up and transfer a call

1. Click on the **Queues** icon on the top toolbar.

Ô

2. Double-click on the queue to view the queue calls.

Agents=2	G	[00:00] 0=ale	1	Calls Max=1 [00:15]	G05=0%		Ans=3		Abn=0	Ct	ver=0	
Extr	First name	Last name	Location	Time	Answere	Avg Tal	Access	Skill	Entry Time	Entry Cour	x	
4 59	Andrew	Richards	Queue		0	00.00	Auto	9	Instant	Instant		
458	Joanne	Price	Office	-	0	00:00	Auto	9	Instant	Instant		
453	Grant	Petersen	Gone Out	12:00 pm Today	0	00:00	Auto	None	Never	Never		
476	Andrew	McBeath	Queue		1	10.51	Auto	9	Instant	Instant		
3 457	Joanne	Huime	Office		0	00:00	Auto	1	Instant	Instant		Queue
@ 414	Duncan	Mler	Office		0	00:00	Q Pickup	1	Instant	Instant	- 7	-
413	Greg	Weeks	Office		2	06:52	Auto	9	Instant	Instant		Agents
@ 452	Natalia	Bel	Office		0	00:00	Auto	2	20 Secs	3		
450	Ray	Bates	Office		D	00:00	Q Pickup	None	Never	Never		
•												Custo me
Queue	Calls											Custome
Ex	tn Subject		Cale	r	Status Qu	eue Time	Ring Time	Tak Tine	Trunk.	Туре	Ļ	_ Calls
41	3 Vaice M	al Support	9773	500	Answered 00:	07	00:00	01:34	11 1	Queue Call	_ ۲	Queuing

3. Click on the unanswered/unassigned call and drag it out of the queue calls and onto your extension (if it is on your sidebar or part of the queue group).

The call will then transfer to your phone and you will be able to pick it up.

You can also transfer the call to another extension if it is available.

Note: You can double click on the call to have it delivered to your phone. **However,** if the call has just been delivered to another extension, you will be unable to take the call. It is recommended that agents log in and out o the queue to ensure accurate call management.

For queue pickup using your phone, see your Voicemail manual.

See Also	
Queues	
What is a Queue?	
Viewing Queues	

Viewing Queue Agents and Call Flow Viewing Queue Calls Last Agent to Log out of Queue Notification Queue Hold Queue Control Queue Properties

Last Agent to Log out of Queue Notification

If you are the last agent to log out of the queue, you will receive the following screen pop on your Desktop to advise you accordingly.



Note: The Last Agent warning will only appear if you log out of the queue using your IPFX client, not if you log out of the queue via your telephone.

See Also
Queues
What is a Queue?
Viewing Queues
Viewing Queue Agents and Call Flow
Viewing Queue Calls
Queue Pickup
Queue Hold
Queue Control
Queue Properties

Queue Hold

Placing a call on queue hold holds the call within the queue for other agents in the queue to view.

Double click to take the call if required.

See Also
Queues
What is a Queue?
Viewing Queues
Viewing Queue Agents and Call Flow
Viewing Queue Calls
Queue Pickup
Last Agent to Log out of Queue Notification
Queue Control
Queue Properties

Queue Control

Note Queue Properties is only for users with Supervisor or Administrator Access. Users can be provided this functionality as a User Feature Level. Please refer to your IPFX Administrator Guide for further information.

To open a Queue

1. Right-click on the required queue from the Queue directory window.

The shortcut menu will appear:

	Call Control	
	Queue Control	•
P	Properties	

2. Click Queue Control.

The Queue Control options will appear.

Call Control		<u> </u>	
Queue Control	≯		Ogen
Properties		00	Forward to Queue
	-	۲	Forward to Message
			Reset

Open

If a Queue is 'closed' override this by clicking on the 'Open' option.

This will set the queue to manually open.

Note The queue will stay manually open until it is 'Reset'.

Forward to Queue

You can forward a queue to another queue.

This may be required if you are short of staff or you are running a promotion.

All forwarded calls will be presented to the agent with the correct queue description.

Note A queue cannot be forwarded to itself, so the selected queue (i.e. the queue to be forwarded) will not appear in the destination list.

Forward to Message

You can forward a queue to a message that will play when a caller enters

the queue.

You may need to use this feature if there is an emergency and all staff are to be evacuated. You then forward the queues to an Audio Text message preset for the occasion.

Reset

The Reset button will reset the queue back to follow its' automatic schedule.

This option is used when a queue has been forwarded to another queue or a message box or has been manually opened after hours etc.

See Also
Queues
What is a Queue?
Viewing Queues
Viewing Queue Agents and Call Flow
Viewing Queue Calls
Queue Pickup
Last Agent to Log out of Queue Notification
Queue Hold
Queue Properties

Queue Properties

Note This feature only available if an IPFX Administrator or IPFX Supervisor Agent license is purchased. For further information on Queue Properties, please refer to the IPFX Administrator Guide.

To view a Queue's Properties

1. Right-click on the required queue.

The shortcut menu will appear.

2. Click Properties...

The Queue Properties screen will appear:

🖀 402 - Project Mana	agement Properties			×
General Agents Sch	nedules Announceme	nts Priority/GOS A	larms Notes Pref Agents Wildcards Holidays Permissions	
Ψ. ·	ue Information.		0-M	
Details Queue <u>N</u> umber: 40	12	Tenant: 1	Virtual Queue:	
Description: Pr	oject Management		Eorce wrapup codes:	
Queue Group:	efault 💌		Use Password:	
Wrapup Folder: S	ystem 🗾			
Queue Adjustments			Extension No Answer	
Queue/Time	Skill Priority	Customer	Return to Queue after 10 seconds.	
Priority		Priority		
Max	: :		• Temporary Logout for 10 seconds.	
: :	: :		C Permanent Logout	
: :	: :	2 2		
Min	1 1			
100%	100%	95%		
			OK Cancel	

For more information see, Config - Queues in the IPFX Administrator Guide.



Viewing Queue Calls

Queue Pickup

Last Agent to Log out of Queue Notification

Queue Hold

Queue Control

Dial

This section explains the options available when you click on **Dial** on the toolbar.

IPFX Client software gives you the ability to control your telephone from your PC.

Click on the down arrow beside the Dial button to display the drop-down menu.

If your phone is ringing and you are busy working on your computer, you can:

 Click the Answer button (this is the Dial button that changes based on the phone state).

Your call will be played through your phone speaker (depending on your phone type).

or

if you are currently on a call, you can hang up the call without having to replace the handset on your phone regardless of the phone type.

For head set users, this is a convenient way of handling your phone calls without taking your eyes from your screen.

Dial/Making an Outbound Call

Dial allows you to dial your required number from your screen easily and quickly.

You can select any of your recently dialled numbers or a new number.

You don't need to dial 1 or 9 to get an outside line.

When you lift the handset and dial a number, the Dial icon changes to red and the handset is vertical with a blue arrow across the phone. The caption changes to read 'Hangup'.

Hangup

When you hang up the icon reverts to show 'on hook'.

or

1. Click on the Dial Icon.

The Dial screen will appear:

🗞 Dial			2
required fo	ter the nun or external	nber you want to d numbers.	lial. No prefix is
Djal	ļ		1
		Dial	Cancel

- 2. Enter the number you want to dial. No prefix is required for external numbers.
- 3. Click Dial. Dial

The call will dial out on your phone and play through the phone speaker - digital phone only. If you have an analogue phone, the phone will ring you first then perform the dial.

See Also Dial Recently Dialled Numbers Answering a Call Hangup/Completing a Call Transferring a Call Complete Transfer

Cancel Transfer
Hold
<u>Resume</u>
Queue Hold
Queue Resume
Hold For
<u>Pickup</u>
<u>Monitor</u>
Intrude

Recently Dialled Numbers

To dial a recently dialled number

- 1. Click on the **Dial** icon.
- 2. The Dial screen will appear.
- 3. Click the drop-down arrow and select an existing number.



4. Click Dial.

The call will dial out on your phone and play through the phone speaker - digital phone only. If you have an analogue phone, the phone will ring you first then perform the dial once you pick up the handset.

Your icon will change to show 'off hook' and the caption will read Hangup.



See Also

<u>Dial</u>

Dial/Making an Outbound Call

Answering a Call

Hangup/Completing a Call

Transferring a Call

Complete Transfer

Cancel Transfer

<u>Hold</u>

Resume

Queue Hold

Queue Resume	
Hold For	
Pickup	
<u>Monitor</u>	
<u>Intrude</u>	

Answering a Call

When your phone rings, it will show as a raised handset, be coloured red and the caption will show as Answer.



5m

When you lift the handset, or click Answer the icon changes to white and the handset is vertical. The caption beside the icon changes to read Hangup.

When you hang up the phone the icon reverts to show on hook.



See Also

<u>Dial</u>

Dial/Making an Outbound Call Recently Dialled Numbers Hangup/Completing a Call

Transferring a Call

Complete Transfer

Cancel Transfer

Hold

<u>Resume</u>

Queue Hold

Queue Resume

Hold For

Pickup

<u>Monitor</u>

Intrude

Hangup/Completing a Call

To hangup/complete a call

• Click on the Hang up button.

G.

The call is now terminated.

The icon reverts to 'On hook' and the caption reads 'Dial'.



See Also

<u>Dial</u>

Dial/Making an Outbound Call

Recently Dialled Numbers

Answering a Call

Transferring a Call

Complete Transfer

Cancel Transfer

<u>Hold</u>

Resume

Queue Hold

Queue Resume

Hold For

Pickup

Monitor

Intrude

Transferring a Call

To transfer a call

1. While speaking to your caller, click on the arrow beside the **Dial** button on the top menu to display the drop-down menu.

Answer
<u>D</u> ial
<u>H</u> ang up
Blind Transfer
Supervised Transfer
Complete Transfer
C <u>a</u> ncel Transfer
Hold
<u>R</u> esume
Queue Hold
Queue Resume
Hold <u>F</u> or
Pickup
<u>⊂</u> onference
Monitor
Intrude

 Click Blind Transfer to transfer the call without introducing the caller or click Supervised Transfer to introduce the caller before hanging up.

The Transfer screen will display.

@ Transfer		
	umber you want to tra r external numbers.	ensferto. No
		Cancel

Your caller will be placed on hold while you enter the number you want to transfer to. No prefix is required for external numbers.

3. Enter the number and click Transfer.

You can then speak to the second caller (if you chose supervised transfer) while the first caller is still on hold. When you hang up, the first caller will connect to the second caller.

Note If you choose to transfer one external party to another external party, the call will use two trunk lines. (One for the internal call and one for the external call). Those two parties will continue to be routed through

your PABX until their conversation is terminated.

See Also

Dial

Dial/Making an Outbound Call

Recently Dialled Numbers

Answering a Call

Hangup/Completing a Call

Complete Transfer

Cancel Transfer

<u>Hold</u>

<u>Resume</u>

Queue Hold

Queue Resume

Hold For

<u>Pickup</u>

<u>Monitor</u>

Intrude

Complete Transfer

To complete the Transfer

While speaking to your caller, click on the arrow beside the Dial button on the top menu to display the dropdown menu.

Answer
<u>D</u> ial
<u>H</u> ang up
Blind Transfer
Supervised Transfer
C <u>o</u> mplete Transfer
C <u>a</u> ncel Transfer
Hold
<u>R</u> esume
Queue Hold
Queue Resume
Hold <u>F</u> or
Pickup
<u>C</u> onference
<u>M</u> onitor
Intrude

Click **Complete Transfer** to complete the transfer.

See Also
Dial
Dial/Making an Outbound Call
Recently Dialled Numbers
Answering a Call
Hangup/Completing a Call
Transferring a Call
Cancel Transfer
Hold
Resume
Queue Hold
Queue Resume
Hold For

<u>Pickup</u>			
<u>Monitor</u>			
Intrude			

Cancel Transfer

Enables you to cancel the transfer and reconnect to the original call. You can then retransfer to another internal number or an external number.

See Also
Dial
Dial/Making an Outbound Call
Recently Dialled Numbers
Answering a Call
Hangup/Completing a Call
Transferring a Call
Complete Transfer
Hold
<u>Resume</u>
Queue Hold
Queue Resume
Hold For
<u>Pickup</u>
<u>Monitor</u>
Intrude

Hold

The Hold function allows you to put a caller on Hold from within the Call Control button. When putting a caller on Hold, it will be displayed as a green phone.

While keeping a caller on Hold you will be unable to make or receive calls.

Note This is applicable only to sites utilizing IPFX for Call Manager.

To put a caller On Hold

1. While speaking to your caller, click on the arrow beside the **Dial** button on the top menu to display the drop-down menu.

Answer	
<u>D</u> ial	
<u>H</u> ang up	
<u>B</u> lind Transfer	
<u>S</u> upervised Transfer	
C <u>o</u> mplete Transfer	
C <u>a</u> ncel Transfer	
Hold	
<u>R</u> esume	
Queue Hold	
Q <u>u</u> eue Resume	
Hold <u>F</u> or	
Pickup	
<u>C</u> onference	
Monitor	
Intrude	

2. Select Hold to place the caller on hold.



Complete Transfer Cancel Transfer Resume Queue Hold Queue Resume Hold For Pickup Monitor

Resume

While your caller is on hold, your Call Control button on the top toolbar will default to a Resume button. Clicking on this button will retrieve the call you had placed on Hold.

This enables you to resume/retrieve the call you placed on hold.

Note This is applicable only to sites utilizing IPFX for Call Manager.

See Also

<u>Dial</u>

Dial/Making an Outbound Call

Recently Dialled Numbers

Answering a Call

Hangup/Completing a Call

Transferring a Call

Complete Transfer

Cancel Transfer

<u>Hold</u>

Queue Hold

Queue Resume

Hold For

<u>Pickup</u>

Monitor

Intrude

Queue Hold

The **Queue Hold** function allows you to put a caller on Queue Hold via the IPFX application - this will leave your extension free to make and receive calls.

If you place an incoming/outgoing call on Queue Hold - this is held within your Personal Queue for your extension and can be viewed within your Call Popup Screen.

If you place a queue call on queue hold - this is held within the Queue for other agents to view and take the call if required.

To put a caller On Queue Hold

1. While speaking to your caller, click on the arrow beside the **Dial** button on the top menu to display the drop-down menu.

Answer
<u>D</u> ial
<u>H</u> ang up
<u>B</u> lind Transfer
Supervised Transfer
C <u>o</u> mplete Transfer
C <u>a</u> ncel Transfer
Hold
<u>R</u> esume
Queue Hold
Q <u>u</u> eue Resume
Hold <u>F</u> or
Pickup
Conference
Monitor
Intrude

2. Select **Queue Hold** to place the caller on hold.

Note To view your Held calls, you need to activate your Popup Screen.

See Also

Dial

Dial/Making an Outbound Call

Recently Dialled Numbers

Answering a Call

Hangup/Completing a Call Transferring a Call Complete Transfer Cancel Transfer Hold Resume Queue Resume Hold For Pickup Monitor

Queue Resume

While your caller is on Queue Hold, your Call Control button on the top toolbar will default to a Queue Resume button. Clicking on this button will retrieve the call you had placed on Queue Hold.

This enables you to resume/retrieve the call you placed on Queue Hold.

Note Where no call list is available, the last call put on hold will be the one resumed.

See Also
Dial
Dial/Making an Outbound Call
Recently Dialled Numbers
Answering a Call
Hangup/Completing a Call
Transferring a Call
Complete Transfer
Cancel Transfer
Hold
<u>Resume</u>
Queue Hold
Hold For
Pickup
Monitor
Intrude

Hold For

The Hold For function allows you to put a caller on Hold for another extension which is currently busy.

This will leave your extension free to make and receive calls.

This function will move the call to the personal queue of the extension they are holding for. It will be visible within that extension's Popup Screen.

Note Personal Queuing does not have to be enabled for this to take place.

For head set users, this is a convenient way of handling your phone calls without taking your eyes from your screen.

To put a caller on Hold For

- 1. While speaking to your caller, click on the arrow beside the Call Control button on the top toolbar to display the drop-down menu.
 - Answei <u>D</u>ial... Hang up Blind Transfer... Supervised Transfer... Complete Transfer Cancel Transfer Hold Resume Queue Hold Oueue Resume Hold For... Pickup... Conference... Monitor... Intrude...
- 2. Select **Hold For** and enter the extension number of the person you wish to place the caller on hold for.

Note To view your Held calls, you will have to activate your Popup Screen. If an extension has a Location set, other than office or queue, you cannot do a 'Hold For' for them.

See Also

Dial

Dial/Making an Outbound Call

Recently Dialled Numbers

Answering a Call

Hangup/Completing a Call

Transferring a Call

Complete Transfer

Cancel Transfer

<u>Hold</u>

<u>Resume</u>

Queue Hold

Queue Resume

<u>Pickup</u>

Monitor

Intrude

Pickup

The Pickup function is a directed pickup which allows you to pick up a ringing phone by entering the ringing extension number.

To pickup a ringing phone

- 1. Click on the arrow beside the Call Control button on the top toolbar to display the drop-down menu.
- 2. Select Pickup...

Call	Control -
	<u>D</u> ial
	Answer
	<u>H</u> ang up
	<u>B</u> lind Transfer
	Supervised Transfer
	Complete Transfer
	Cancel Transfer
	Hold
	<u>R</u> esume
	Queue Hold
	Queue Resume
	Hold <u>F</u> or
	Pickup
	<u>C</u> onference
	Monitor
	Intrude

A screen will appear.

3. Enter the number of the extension which is ringing to pick up the call on your phone.

Note You can not pick up an extension that has been answered or has gone to voicemail.

See Also

<u>Dial</u>

Dial/Making an Outbound Call

Recently Dialled Numbers

Answering a Call

Hangup/Completing a Call Transferring a Call Complete Transfer Cancel Transfer Hold Resume Queue Hold Queue Hold Queue Resume Hold For Monitor

Monitor

To Monitor the conversation of another party

1. Click on the Call Control button and select Monitor...

Answer
<u>D</u> ial
<u>H</u> ang up
Blind Transfer
Supervised Transfer
Complete Transfer
C <u>a</u> ncel Transfer
Hold
<u>R</u> esume
Queue Hold
Q <u>u</u> eue Resume
Hold <u>F</u> or
<u>P</u> ickup
<u>C</u> onference
Monitor
Intrude

The Monitor screen displays.

Plea	ase enter the extension to	monitor.
4onitor:	112	-
	Monitor	Cancel

2. Enter the extension number and click Monitor.

This enables you to monitor the conversation of another party.

The Default settings for this feature are:

User and Supervisor level - Default = Off Administrator level - Default = On

If monitoring a call from another extn, when the extn monitoring clicks record, the customer and internal extn are recorded, eg: both parties conversations.

Note Please see your IPFX Administrator to activate this feature. **Note 2** Monitor is available on IPFX for Call Manager but this option is not silent e.g. both parties that you monitor can hear you.

See Also

<u>Dial</u>

Dial/Making an Outbound Call

Recently Dialled Numbers

Answering a Call

Hangup/Completing a Call

Transferring a Call

Complete Transfer

Cancel Transfer

<u>Hold</u>

<u>Resume</u>

Queue Hold

Queue Resume

Hold For

<u>Pickup</u>

Intrude

Intrude

Note This feature requires IPFX Administrator privileges.

To Intrude on a call

1. Click on the Call Control button and select Intrude.

Answer
<u>D</u> ial
<u>H</u> ang up
Blind Transfer
Supervised Transfer
Complete Transfer
Cancel Transfer
Hold
<u>R</u> esume
Queue Hold
Q <u>u</u> eue Resume
Hold <u>F</u> or
<u>P</u> ickup
<u>⊂</u> onference
Monitor
Intrude

The Intrude screen displays.

Intrude			
Please enter the extension to Intrude.			
Intrude: 418	•		
Intrude	Cancel		

2. Enter the extension number and click Intrude.

This enables you to intrude into a conversation of another party.

The Default settings for this feature are:

User and Supervisor level - Default = Off Administrator level - Default = On

If intruding on a call, the internal extension would hear a beep first before your voice. Your phone LCD Display will also flash once. The connected party does not hear your conversation.

Tip for the IPFX Director platform only: If you wish to speak privately with a supervisor who has silently intruded on your call, press *3 on your

phone's keypad to place the outside caller on Hold. Press *3 again to take the outside caller off Hold.

Note: Using the Hold function from your computer or the Hold button on your phone will place both the outside caller and supervisor on hold!

Note: If either your colleague or their caller hangs up during your intrusion, you will be disconnected from the call.

Warning!

On the *IPFX for CallManager* platform, both your colleague and his/her caller will be able to hear you when you intrude on their call.

On the *IPFX Director* platform, intrusion is *silent* to the third party: only your colleague will be able to hear you.

See Also

<u>Dial</u>

Dial/Making an Outbound Call

Recently Dialled Numbers

Answering a Call

Hangup/Completing a Call

Transferring a Call

Complete Transfer

Cancel Transfer

<u>Hold</u>

Resume

<u>Queue Hold</u>

Queue Resume

Hold For

<u>Pickup</u>

<u>Monitor</u>

Work Time



What is Work Time?

Allows an agent in a IPFX Contact Centre to schedule some time after hanging up to complete the call's requirements or documentation, before receiving another queue call.

Work time can be set for each individual agent by default so that after a call, they always have time before the next call is sent to them.

Alternatively, each agent can set work time as and when required.

Note You must have purchased the IPFX Contact Centre module for this to be enabled.

See Also
Work Time
Adding Work Time
Custom Work Time
<u>Clear Work Time</u>
Setting default Work Time

Adding Work Time

To Add Work Time

1. Click the Work Time icon on the toolbar.



A drop-down box will appear.

Clear work time	
Add 30 Seconds	
Add <u>1</u> Minute	
Add <u>2</u> Minutes	
Add <u>3</u> Minutes	
Add <u>4</u> Minutes	
Add <u>5</u> Minutes	
Custom work time	

2. Click the Work Time required.

Your location button will now change to show you are on Work Time.



When the work time has expired, your location will change back to your original location setting and you will be able to receive calls.

By holding your mouse over the **Location** Icon, you will be able to see the return time.

Work time until 11:36 am Today

Note By selecting the Work Time icon (instead of the drop-down arrow) your work time will set to the site default work time settings. To clear work time, reselect the Work Time icon. See your Administrator for information on Site default work time settings.

See Also

Work Time

What is Work Time?

Custom Work Time

Clear Work Time

Setting default Work Time

Custom Work Time

To set Custom Work Time

1. Click the Work Time icon on the toolbar.



A drop-down box will appear:

Clear work time
Custom work time
Add 30 seconds
Add 1 minute
Add 2 minutes
Add 3 minutes
Add 4 minutes
Add 5 minutes

2. Click Custom work time.

The Custom Work time dialog will appear:

Work time	
Please enter the number of minutes you want to add to your work time. (e.g. 1 = one minute)	OK
	Cancel

3. Enter the time (in minutes) and click OK.

Your location will change to show work time.



When the work time has expired, your location will change back to your original location setting and you will be able to receive calls.

By holding your mouse over the **Location** icon, you will be able to see the return time.

Work time until 11:36 am Today

See Also

Work Time

What is Work Time?

Adding Work Time

Clear Work Time

Setting default Work Time

Clear Work Time

To Clear your Work Time

1. Click the Work Time icon on the toolbar.



A drop-down box will appear.

Wo	rk Time 🔻	
	Clear work time	
	Add 30 seconds	
	Add <u>1</u> minute	
	Add <u>2</u> minute	
	Add <u>3</u> minute	
	Add <u>4</u> minute	
	Add <u>5</u> minute	
	Custom work time	

2. Click Clear work time.

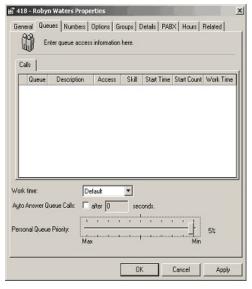
Your Location will change back to your previous setting.

See Also <u>Work Time</u> <u>What is Work Time?</u> <u>Adding Work Time</u> <u>Custom Work Time</u> <u>Setting default Work Time</u>

Setting default Work Time

To set default Work Time

- 1. Click on the **Directory** icon on the top toolbar.
- 2. Right-click on your extension and click Properties.
- 3. Click the **Queues** tab.



4. Change the Work Time to the required time and click **OK**.

Note This work time will apply every time an outside number is called, an internal call is made or a call is delivered.

See Also

Work Time

What is Work Time?

Adding Work Time

Custom Work Time

Clear Work Time

Contact

This section explains the options available when you click on **Contact** on the IPFX Live Desktop Toolbar.

	See Also
	IPFX Phone Control Toolbar
	Using locations
	<u>Voicemail</u>
In This Section	Send a message
What is a Contact?	Directory
Adding a Contact	<u>Queues</u>
	Dial
	Work Time
	Record
	<u>Reports</u>
	<u>Options</u>

What is a Contact?

You can keep a directory of contacts within IPFX Live Desktop for caller ID, quick key calling and general information.

Personal Contacts are only accessible by you and you can add, edit or delete these.

The Administrator can add the Company Contacts and you can utilize these for dialling only.

See Also		
<u>Contact</u>		
Adding a Contact		

Adding a Contact

To Add a Contact

1. Click on the **Contact** icon on the top toolbar.



The New Contact screen will appear:

New Contact			
General Notes			
Enter contact information here.			
Address <u>b</u> ook:	Personal Directory		
Description:			
Phone numbers:	Office Mobile Home		
Account code:			
Email Address:			
<u>P</u> riority:	0 (Normal)		
	<u>OK</u> <u>Cancel</u>		

Address Book

Only an administrator has access to changing the Company Directory. A User has access to Personal Contacts only.

You can make changes to your own Personal Directory.

Description

The Contact Description that will display in the Directory.

Phone number

You can enter a number for the Office, Mobile or Home. For a Contact to be active, one number must be entered.

- Include International Calling Numbers and Area Codes.
- No spaces are required between codes.
- Do not insert a 1 or 9 to get an outside line.

Account code

If you are in a Call Centre environment and IPFX Live Desktop is networked with your own software system, you can enter an account code which will show when that caller dials in in the Call Popup Screen.

Email Address:

You can enter the email address of your contact in this field.

Priority

You can set the priority of a customer so that when two calls come in at the same time, the call with the highest priority will be answered first.

If a caller uses your Toll Free number for example, they will take priority if they are a national caller, over a customer who is local.

Preferred Queue

To select the queues you wish your customers to be directed to

- 1. Click on the drop-down box arrow to display the list of queues.
- 2. Select your queue.
- 3. Click OK.

Preferred Agent

To select which Agent you would like your customer to be sent to within the queue:

- 1. Click on the drop-down box arrow to display the list of Agents.
- 2. Select your Agent.
- 3. Click OK.

Note: For information on setting up Preferred Agent Groups so that you can select the Preferred Agent your customer can be sent to, please refe to the IPFX Administrator Guide (Config/Groups/Preferred Agent to set up the Preferred Groups and Groups; and Config/Queues/Settings to set

up agents who belong to those groups). Note 2 This feature requires a IPFX Contact Centre module to be purchased

See Also

<u>Contact</u>

What is a Contact?

Record

This section explains the options available when you click on **Record** on the toolbar.

What is Record?

You can record a current conversation and save it for future reference or use.

Each recording is saved as a voicemail message which you can open, listen to, forward or delete just like a normal voicemail message.

Note Depending on your company requirements, this option may not be enabled.

See Also

Record

Recording Criteria

Recording a Conversation

Stop Recording a Conversation

Recording Criteria

Please read the Privacy Act laws in your country to understand the legal requirements for recording a conversation.

See Also	
Record	
What is Record?	
Recording a Conversation	
Stop Recording a Conversation	

Recording a Conversation

To record a conversation

While you are on a call, click on the **Record** icon on the top toolbar.



The Record Icon will change to show that it is recording:



See Also	
Record	
What is Record?	
Recording Criteria	
Stop Recording a Conversation	

Stop Recording a Conversation

To stop recording a conversation

1. Click the **Recording** icon.

IPFX Live Desktop will stop recording and the icon will change back to the **Record** icon.

2. Click on the **voicemail** icon on the top toolbar.

Open the message and you can hear the recording. See Voicemail.

See Also	
Record	
What is Record?	
Recording Criteria	
Recording a Conversation	

Reports

If an IPFX Administrator or IPFX Supervisor Agent license is purchased, a Reports button will appear on the toolbar. Please refer to the separate Reports User Guide (or press the F1 key in the IPFX Reports window).

Note This feature only available if an IPFX Administrator or IPFX Supervisor Agent license is purchased

Options

This section explains the options available when you right-click on the IPFX Phone Control Toolbar and click **Options**.

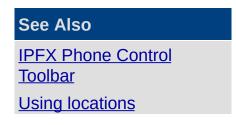
On all tabs of the Options screen:

This Button	Does This
	This allows you to customize the view of your Directory without affecting other users, e.g. if you wish to see the Directory columns in the order of extension number, first name, last name, department, location, mobile number, etc. Please see your Administrator for access privileges if required. Click on the Directory Fields button The screen below displays
Customize Directory View	Show Fields Select the fields you would like to show in your personal extension directory (Fields marked with a * are required, and cannot be removed from the directory view) Available fields: Show these fields in this order: Axasicate Add -> Birthday Add -> Building Location Add -> Home/Other <-> Location Start Time Add -> Mobile Office Extension Pager Position Department Location Region *Server Move Up Move Down

Select fields required.

Use Move UP/Move Down buttons to place selected fields in required order. Click OK when completed.

You will have to shut your email client down and reopen to view the Directory Column changes.



In This Section	<u>Voicemail</u>
General Tab	Send a message
Network Tab	Directory
Popups Tab	<u>Queues</u>
<u>Keys Tab</u>	Dial
	Work Time
	<u>Contact</u>
	Record
	Reports

General Tab

🖀 IPFX Live Desktop Options 🛛 🛛 🛛		
General Network Popups Keys		
IPFX Live Desktop	4.3.1.12	00
Large Icons	v	Change Password
Icon Captions		Clear Saved Password
Show virtual queues	Г	
Auto-Answer Picked up calls	V	No Supervised Transfer
View Operator Messages	▼	
Window St <u>y</u> le:	Normal	
Away status time (minutes):	0	
Customize Directory View		OK Cancel

This tab identifies the version of IPFX Live Desktop software you are running, and the following:

This Feature	Does This
Large Icons	Changes the size of the icons on the Top Toolbar Tick the Large Icons checkbox to keep Large Icons
Icon Captions	Shows the caption of each icon for quick recognition Tick the Icon Captions checkbox to keep the captions under each icon.
Show Virtual Queues	Allows visibility of all virtual queues to users.
Auto- Answer Picked Up Calls	Enables your phone to auto-answer any calls you have picked up. Tick the checkbox to turn this feature on or, if you wish your phone to ring first (so that you can press the Answer key on your phone or pick up the handset to answer the call), remove the tick from this checkbox.
	You can change the way IPFX Live Desktop appears by selecting a Window

	Style, i.e. This Feature	Does This
Window Style	Sidebar and Toolbar	Hides IPFX Live Desktop and, when you need to access it, either move your mouse to the left edge of your screen for the Sidebar to "popup" or top of the screen to view the Toolbar
	Sidebar Only	as above but just the Sidebar displays
	Toolbar Only	as above but just the Toolbar displays
	Normal	this option keeps IPFX Live Desktop onscreen on open
Away status time (minutes) Change Password	 This features a timer that is set based on the movement of your mouse and keyboard to alert others that you may be away from your desk. The time is set in minutes, e.g. 5 equates to '5 minutes'. If you have not moved your mouse or keyboard after this time, your location icon shows a timer on it (i.e.) to advise other users that you may no longer be at your desk. Enter a value in the text box to turn this feature on. If this feature is now on and you are a Call Centre Agent that has been temporally logged out of the queue, you can manually log back into the queue by selecting your Location accordingly. Allows you to change your password. When you select this option, a Set Password box appears. Enter and confirm your new password. Click OK to change. Next time you open the application you can use your new password (and must not start with a 0. 	
Clear Saved Password	Enables you to reset the password prompt at the start-up screen (when the user has checked 'Save Password' at startup).	
No Supervised Transfer	If you do not wish to allow Supervised Transfers, check this box.	
See Also		
Options		
Network Tab		

Popups Tab

<u>Keys Tab</u>

Network Tab

PFX Live Desktop Options		
General Network Popups Keys		
Network Settings		
<u>A</u> ddress:	127.0.0.1	
<u>P</u> ort:	100	
Na <u>m</u> e:	TECHWRITE01	
Extension:	301	
Customize Directory View OK Cancel		

This Feature:

Does this:

Address	This is the TCPIP address of the CTServer. This enables your client to locate the CTServer for sending and receiving information.
Name	This is the alpha name of the CTServer.
Port	This is the port number of the CTServer.
Extension	This should be the same extension as your phone.

Tip! To check if this Extension number is correct, if you have a digital phone pick up the receiver and the extension number will show on the screen or dial another extension that has a digital phone to see what you extension number is when it comes up on their screen.

See Also

Options General Tab Popups Tab Keys Tab

Popups Tab

FIPFX Live Desktop Options		
General Network Popups Keys	1	
Popups and Alarms Confi	iguration	
Auto Return Location	Popup <u>c</u> all screen Call Alerts	दा दा
	Queue A	larms
	1	
Customize Directory View	ок с	ancel

Auto Return Presence	Because this feature is OFF by default, you will receive a dialog box asking if you wish to have your Presence set back to Office when it reaches the expiry time (so that if you are not back in the office when expected, your Presence does not automatically expire). Tick this checkbox if you wish your Presence to change back to Office immediately upon expiry.
Popup call screen	This is the first of two Popup Screen options. Popup call screen allows you to not only view but record incoming call information (i.e. you will be able to select wrapup codes and enter notes if you have enabled these options). If you want this as your default popup screen and Call Alerts (below) make sure you clear the Call Alerts checkbox. For further information on this feature, refer to Alerts .
Call Alerts	This is the second of two Popup Screen options. Call Alerts make you aware of an incoming call in the form of a simple Popup Screen on the bottom right side of your PC screen. From this screen, you can click Answer to speak to the caller or send the call directly To Voicemail . Tick the checkbox to turn this feature on (it will also tick the Popup call screen box but will not be overridden by it). For further information on this feature, refer to Alerts .

Presence Notification Alerts	This feature uses a similar Popup Screen to Call Alerts (above) and notifies you that your Presence has changed or expired. From this screen, you can click Change to amend your Presence setting. Tick the checkbox to turn this feature on. For further information on this feature, refer to Alerts .
	If you wish to receive notification of Alerts or Warnings Alarms from the IPFX Contact Centre, you can select what Queues you wish to receive these from.
Queue Alarms	Note This feature only available if an IPFX Contact Centre module is purchased. Note 2 If you already receive alarms and this feature is not ticked, please see your IPFX Administrator as you may be set up at an incorrect Queue Level.

See Also	
<u>Options</u>	
<u>General Tab</u>	
Network Tab	
Keys Tab	

Keys Tab

You can set the function keys on your keyboard to allow dual functionality between IPFX Live Desktop and other software packages. If you are utilizing headsets, this is a smart option for continuity.

📽 IPFX Live Desktop Options				
General Network Popups Keys				
Function Key Setup.				
Function Key <u>2</u> :	(none)			
Function Key <u>3</u> :	(none)			
Function Key <u>4</u> :	(none)			
Function Key <u>5</u> :	(none)			
Function Key <u>6</u> :	(none)			
Function Key <u>7</u> :	(none)			
Function Key <u>8</u> :	(none)			
Function Key <u>9</u> :	(none)			
Function Key <u>1</u> 1:	(none)			
Function Key <u>1</u> 2:	(none)			
NOTE: Function keys 1 and 10 are reserved for windows help and menu options respectively.				
Customize Directory View OK Cancel				

F1 and F10 are reserved for standard Windows Help and Menu options respectively (use F1 to get Online Help or activate the Office Assistant and use F10 to activate the Menu Bar). Options available to be set from the drop-down menu on the remaining Function Keys are:

Drop-Down Menu	Options
	(none)
	Answer
	Blind Transfer
	Cancel Transfer

Complete Transfer Conference Dial Hang Up Hold Hold For Monitor Pickup Queue Hold Resume Supervised Transfer

Note If you are using your own company software, some of the function keys may already be in use. Check with your System Administrator.

See Also

Options

<u>General Tab</u>

Network Tab

Popups Tab

IPFX Telephony Group Shortcuts

The IPFX Telephony Group Shortcuts (sidebar) is on the left-hand side of your IPFX Live Desktop screen.

There are three ways to display it:

- 1. Set the Options\General\Windows Style to **Normal** for IPFX Live Desktop to display as a full screen (so the sidebar stays visible on the left side of the screen).
- 2. Set the Windows Style to **Sidebar Only** (so it is hidden when not in use). You will need to move your cursor to the far left of your PC screen to "pop out" the hidden sidebar.
- 3. Set the Windows Style to **Sidebar and Toolbar** (so both toolbars are hidden when not in use). You will need to move your cursor to the far left of your PC screen to "pop out" the hidden sidebar.

	See Also
	How to Use
In This Section	IPFX Phone Control
Configuring the Sidebar	Toolbar
	<u>Main Window</u>
	System Tray

Configuring the Sidebar

For convenience, you can populate the sidebar with the directory, extensions and queues that you want to view or use regularly.

You can add and remove folders and change the appearance of the icons.

To configure your sidebar

Right-click on the sidebar.

A shortcut menu will appear.



Large Icons / Small Icons

The icons on your sidebar can be changed according to your preference by selecting Large Icons or Small Icons. Icons are set to large by default.

Add New Folder

- 1. Click on Add New Folder
- 2. The new folder screen will appear.
- 3. Enter the caption for your new folder and click **OK**.
- 4. Your new folder will now show on the sidebar.

Remove Folder

- 1. Right-click on the folder you want to remove.
- 2. Click **Remove Folder**.
- 3. You will be prompted to confirm you do want to remove the correct folder.
- 4. Click **Yes** to Remove or **No** to cancel.

Rename Folder

- 1. Right-click on the folder you want to rename.
- 2. Click Rename Folder.
- 3. You will be prompted to rename the folder.
- 4. Click **OK** to save the change or **Cancel** to discard.

Add to Sidebar

- 1. Right-click on the folder that you want to add an item to.
- 2. Select Add to Sidebar. . . from the shortcut menu.
- 3. An Add Item box will appear.
- 4. Select **Extension**, **Queue** or **Directory** or **Contact** and type in the corresponding **number**.
- 5. Click OK.
- 6. Your selection will now be added to the sidebar.

Note You can also 'drag' an extension, queue or contact onto the sidebar Click on the Directory, Queue on the top toolbar, or click a Company or Personal directory contact. Click and hold the selection and drag across onto the sidebar. You cannot add a queue, extension or contact with the same number in the same folder.

Remove an Extension, Queue or Contact from the Sidebar

- 1. Right-click on the extension or queue icon
- 2. The shortcut menu will appear.
- 3. Click Remove from Sidebar.
- 4. You will be prompted to remove the Item.

5. Click **Yes** to Remove the item or **No** to cancel.

See Also

IPFX Telephony Group Shortcuts

Main Window

The following screens appear in the Main Window of IPFX Live Desktop when you select these options from **IPFX Phone Control Toolbar** or **IPFX Telephony Group Shortcuts**.

	See Also
	How to Use
In This Section	IPFX Phone Control
Voicemail	Toolbar IPFX Telephony Group Shortcuts
	System Tray

Voicemail

For detailed instructions on how to use the features in this screen, see **Voicemail.**

In This Costion	
In This Section	See Also
	SCC AISO
Directory	Main Window
<u>Oueues</u>	
<u>Queues</u>	

Directory

For detailed instructions on how to use the features in this screen, see **Directory**.

See Also	
Voicemail	
Queues	

Queues

For detailed instructions on how to use the features in this screen, see **Queues**.

See Also Voicemail Directory

System Tray

The System Tray (lower-left hand corner of your screen) automatically displays your Location icon when you log into IPFX Live Desktop.

You can double-click on the Location icon to open the **Current Calls** screen or right-click the icon to view **Location** and **Call Control** options.

The System Tray is also where the popup screens are launched from. This section explains the popup screens in more detail.

	See Also
In This Section	How to Use
<u>Alerts</u>	IPFX Phone Control Toolbar
Activating the IPFX Live Desktop Popup Screen	IPFX Telephony Group Shortcuts
	Main Window

Alerts

In This SectionSee AlsoCall alertsSystem TrayLocation Notification alertsActivating the IPFX Live
Desktop Popup Screen

Call alerts

When **Call Alerts** is checked in the **Popups** tab of your **CTI Options**, the following screen will appear when you receive a call and/or your Location is set to Office or Queue:

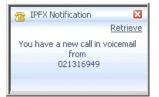


If receiving a call, you can do one of two actions:

- Click Answer (or pick up the ringing phone) to talk to the caller; or
- Click To Voicemail to send the caller immediately to your Voicemail mailbox.

Note If you do not do either of these actions, the caller will go to Voicemail after the set period

If your Location is set so that incoming calls go immediately to Voicemail, the following screen will appear to let you know a call has arrived and has been sent to Voicemail:



If you wish to talk to the caller, you simply click on **Retrieve** to pull them out of Voicemail.

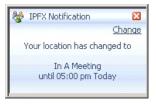
See Also

<u>Alerts</u>

Location Notification alerts

Location Notification alerts

If you have Location Notification Alerts checked in the Popups tab of your CTI Options, a similar popup screen appears every time your Location changes:



You can click **Change** to alter your Location from this window.

See Also		
Alerts		
Call alerts		

Activating the IPFX Live Desktop Popup Screen

Activating the IPFX Live Desktop Popup Screen allows users to see Caller Identification and also use the Wrap-up feature in a Call Centre environment.

To activate the Popup Screen

- 1. Right-click on the top toolbar and click on Options.
- 2. The Options Screen will appear. Click the Popups tab:

📽 IPFX Live Desktop Opt	ions		
General Network Popups	Keys		
Popups and Alarn	ns Config	guration	
Aut <u>o</u> Return Location Loca <u>t</u> ion Notification Alerts		Popup <u>c</u> all screen Call Alerts	<u>र</u> । र
		Queu	e Alarms
Customize Directory View		ок	Cancel

- 3. Check the Popup call screen checkbox to enable the Popup screen.
- 4. Click OK.
- 5. The Popup screen will now be minimized in your System Tray in the bottom right hand corner of your screen where it will display as a telephone icon.
- 6. Whenever you receive a call, the Popup Call screen will appear.

Incoming Calls Popup Screen

ie		Reason: 3		
Caler	⇒ Stat	t.s	Duiation	
Arapup codes:				
En 🧾 Fystein	 Cule		Descri di n	
	03.0	ransferred Cells		
u≊ue ≧ incoming	0371	Moble C-Is		
	_			

The sample screen shown above is displayed with the Wrapup Codes enabled.

When a call presents itself to your extension, the Popup screen will appear.

The call displays as a ringing phone (i.e. a red phone) and, when answered, the icon will turn yellow and show 'off hook'.

Information displayed here allows you to see the **Caller ID**, Status of the Call and the duration of the current status.

Note Caller ID is only shown if enabled on your system. If not, 'Unknown Caller' will be displayed. A name will be displayed if the Caller ID matches an entry that is in your Personal/Company Contacts or is an internal caller.

In This Section	
Callers in Voicemail	
Open a Popup screen Popup Screen Options	See Also
How to replace a Call Screen with a Call Alert	<u>System Tray</u> <u>Alerts</u>
How to resize your Popup Screen	

Callers in Voicemail

If you are already on a call and a second call appears, you are able to see the Caller ID information (Name/Description will appear if they are in your Contacts).

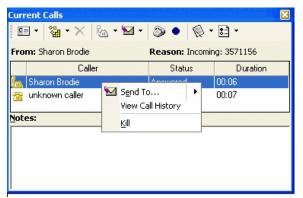
🗉 • 🖓 • 🗙 🛛	🗟 • 🗖 • 🔊	•	:: •
From:	Reason:	Outgoing	
Caller	Status	Duration	
6	Answered	00:06	
🎯 Robyn Waters	In Voice Mail	00:02	

The status of the call will also be shown (i.e. In Voicemail).

To View the Call History of your Caller



1. Right-click on the Caller within your Screen Pop.

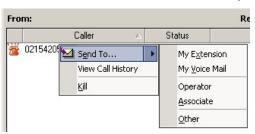


2. Click View Call History to see the Caller History.

Call History	125	- 505		
Date	Time		Last Contact	
26 May 2005	10:56	VM Port1 (8401)		٢
26 May 2005	10:54	VM Port1 (8401)		۲
25 May 2005	08:12	VM Port1 (8401)		۲
21 May 2005	13:35	VM Port1 (8401)		SEEEE
17 May 2005	20:21	VM Port1 (8401)		۲
6 May 2005	13:05	VM Port1 (8401)		۲
)7 May 2005	12:22	VM Port1 (8401)		٢
07 May 2005	12:19	VM Port1 (8401)		۲

Note If you place your cursor over the 'i' in the right hand corner of this view call history form, you can view where the Caller has been transferred to and from for this particular call.

If you select **Send To..** the menu shown below displays.



Select where you want to send the call.

See Also
Activating the IPFX Live Desktop Popup Screen
<u>Open a Popup screen</u>
Popup Screen Options
<u>How to replace a Call</u> <u>Screen with a Call Alert</u>
How to resize your Popup Screen
Wrapup Codes

Open a Popup screen

To Open the popup Screen

- 1. Double-click the Location icon in your Windows System Tray; or
- 2. Right-click on the Popup Screen icon in the System Tray. The following menu will display (this menu is the same as that displayed on the Call Control icon on your Phone Control Toolbar):



You can operate any of the Call Control functions displayed on this menu.

Click **Open** to open the Call Screen.

Note Call Control options are active depending on your phone state.

For information on Call Control functionality, refer to Call Control.



Popup Screen Options

There are several options available to customize your popup screens. The following covers each Icon from left to right.

This Feature	Does This
Contact	 Create a new contact or show you the details of a recognized caller. 1. If you have no calls in the Calls Popup, click on the Contact button to create a new contact The New Contacts screen will appear. Enter the contact details and click OK. The New Contact will reside in your Personal Contacts List. If you have calls in the Calls Popup, click on the Contact button to display the properties of the currently selected Caller (if the Caller is not recognized, the New Contacts screen will appear).
	Note Options in this section are specific to the Application you are using. For further information please refer to Directory Integration.
	Allows you to view your- current calls, missed calls,
	 answered calls, and
View	 outgoing calls. Maximum setting is 10.
	Note Changing the view selection also changes the name of the screen, i.e. selecting missed calls, changes the name of the screen to Missed Calls.
Delete	This deletes any calls in your View folder.
Dial	Click on the down arrow at the right of the Dial button to display this dropdown menu. This is the same menu as shown on the top tool bar. You can carry out any of the functions listed from this menu.
My Voicemail	If a call is ringing at your extension, you can select/highlight the call and click on the My Voicemail Icon. The caller will now be sent to voicemail and will listen to your greeting. If a caller is showing as 'In voicemail', select/highlight the call, then click on the Icon 'My Extension'. This will retrieve the call out of your Voicemail and will start ringing on your extension.
	Note This will still work even if you have a Location selected. You can also send a call to any other number.

	on the icon.	call in voicemail by selecting/highlighting the call and clicking	
	You can end it by p	placing the handset back in the cradle.	
Listen	Note If you wish to listen to a call in Voicemail and then retrieve it, you must hangup your phone before retrieving the call from Voicemail. This is active for NEC and IPFX only.		
	into your voicemai	s you to record your current telephone conversation directly I box where it can be replayed. The Record Icon will be Blue g and will turn Red when recording.	
Record	Note Recording of telephone conversations without consent from all parties involved is ILLEGAL. Please refer to your Privacy Act Laws.		
Work Time	This is used if the Contact Centre module is installed. It allows agents to finish off paperwork etc. before the next queue call is presented to their phone. You can use any of the preset times or select Custom Set Time to set your own time.		
	Displays a drop-down menu of the following:		
	This Feature	Does This	
	Call Information	Allows Caller Information to be displayed in Popup Screen.	
	Call List	Displays a list of calls for your extension.	
	Wrapup Codes	Displays Wrapup Codes for selection when a call is finished (if applicable).	
	Auto Select Wrapup Folder	Displays the wrapup folder for the active call state (ie. outbound, incoming, queue)	
	Notes	Displays a screen to enter any relevant notes.	
	Use Alert Notification	Displays Incoming calls in your 'Toast' Popup.	
	Show on Outbound	Allows Screen to popup when outbound calls are made.	
Options	Show On Incoming	Allows Screen to Popup when a call is Incoming.	
	Show on Wrapup	Show Screen Popup on Wrapup.	
	Hide on Release	Allows Screen to disappear upon hangup.	
	Hide on Wrapup	Allows Screen to disappear upon hangup.	
	Beep on New Call	Incoming call will beep via Multimedia Speakers.	
	Show Queue	Shows the length of time that the call has spent in the	

Time	queue.
Always on Top	Ensures Pop Screen always displays on top of any other open screens.
Show button Captions	Displays captions under the buttons on the Pop Screen Menu Bar.
Large Icons	Resizes the icons on the toolbar.

See Also

Activating the IPFX Live Desktop Popup Screen

Callers in Voicemail

Open a Popup screen

How to replace a Call Screen with a Call Alert

How to resize your Popup Screen

How to replace a Call Screen with a Call Alert

To replace the Call Screen with a Call Alert

- 1. Select the CTI Options Tab (n.b. in IPFX Live Desktop, right-click on the top toolbar and click **Options**).
- 2. Check the **Call Alert** checkbox.

Note When both Popup call screen and Call Alerts boxes are checked, Call Alerts is the default popup screen.

3. Click OK.

The popup call screen will be minimized in your System Tray in the bottom right-hand corner of your screen, and displays as the current Location icon.

See Also

Activating the IPFX Live Desktop Popup Screen

Callers in Voicemail

Open a Popup screen

Popup Screen Options

How to resize your Popup Screen

How to resize your Popup Screen

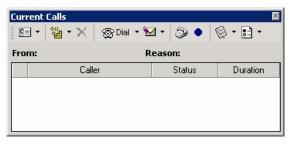
If you wish to change the size of your Popup Screen:

- 1. Place the mouse over the bottom right hand corner of the Popup Screen to enable the resize icon. (The mouse pointer changes to a double pointed arrow).
- 2. Click, hold and drag to the desired size.

If you wish to change the location of your Popup Screen:

• Highlight the title bar and drag to your preferred location.

This is where your Screen Pop will now populate your screen.



Note If your call popup populates your screen and then you open another window in Outlook, e.g. Tools/Options, and then click on email options within the options screen to open a second level window, the call popup will display but you cannot click on items in the call popup while outlook forms are open.

See Also

Activating the IPFX Live Desktop Popup Screen

Callers in Voicemail

<u>Open a Popup screen</u>

Popup Screen Options

How to replace a Call Screen with a Call Alert

Wrapup Codes



Wrapup codes can be used to categorize each call for reporting and business analysis.

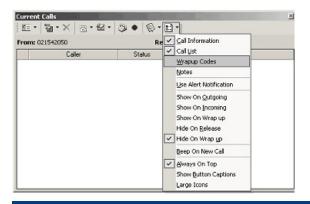
Wrapup codes can be applied to incoming calls, outgoing calls, queue calls, callback, queue emails and queue faxes.

The idea is to select a Wrapup code or codes that best describes the nature of the call.

How to View Wrapup Codes

To view Wrapup codes -

- 1. Click on the **Options** button on the Call Screen screen toolbar.
- 2. Select Wrapup Codes as shown on the screen below.



See Also

Wrapup Codes

How to use Wrapup Codes

Wrapup Folders

How to Use Notes

How to use Wrapup Codes

If you have selected to view Wrap codes, the Call Screen appears with the Wrapup codes panel open as shown in the screen below.

Current Calls			×
ஊ • 🍇 • × 🗟 • 🗠 •	🔊 • 🔯 • [si •	
То:		Reason: Outgoing	
Caller	△ Status	Duration	
14867012	Answered	00.21	
Wrapup codes:			
🖃 💼 System	Code	Description	
	300 Tran	sferred Calls	
E Cueue □ 00	301 Mobi	ile Calls	
Notes:			
Enter a note here			
			Apply

You can apply a Wrapup code(s) during or just after a call.

- Check the box or boxes of the codes that most accurately reflect the nature of your call.
- Click Apply.

Supervisors/Administrators can create Wrapup codes.

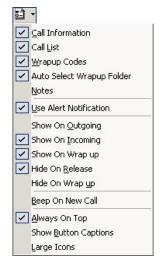
Supervisors/Administrators can 'force' Wrapup codes at a Queue level or at an Agent level.

When Wrapup codes are 'forced' each agent must select a Wrapup code or codes before the next queue call can be delivered.

Wrapup Codes How to View Wrapup Codes
Margaren Estelare
Wrapup Folders
How to Use Notes

Wrapup Folders

To ensure the correct wrapup folders display when an incoming, outgoing or queue call is received you must tick **Auto Select Wrapup Folder** on your popup screen's options menu:



Wrapup folders are visible from the popup screen. The screen below shows the Wrapup folder that corresponds with the call type on the left side of the screen. In this case, it is an Outgoing call so the Outgoing Wrapup folder is automatically showing:

Current Calls	×
│	
To: Reason: Outgoing	
Caller 🔺 Status Duration	
Contemporary Answered 00:21 Answered 00:21	
Wrapup codes: System Code Description	
Outgoing 0300 Transferred Calls	
Queue O301 Mobile Calls	
Notes:	
Enter a note here	
	Apply

Note IPFX Administrator and IPFX Supervisor Agents can allocate Wrapup codes to a relevant Wrapup code folder.

See Also

Wrapup CodesHow to View Wrapup CodesHow to use Wrapup CodesHow to Use Notes

How to Use Notes

If you have **Notes** checked on the Call Screen Options menu, a **Notes** section will display below the Wrapup codes section on the Popup Screen as shown on the screen below.

Current Calls		×
· · · · · · · · · · · · · · · · · · ·	ی • 🕲 •	<u>.</u>
To:		Reason: Outgoing
Caller	Status	Duration
14867012	Answered	00:21
Wrapup codes:		
⊡ 🧰 System	Code	Description
Outgoing 00	800 Tran	nsferred Calls
🔁 🔁 Queue 📃 🗋	01 Mob	vile Calls
Incoming		
Notes:		
Enter a note here		

The screen above is displayed with Wrapup codes and Notes enabled.

- Select the required Code(s), then
- Enter your notes in the Notes section. Notes are where additional information can be entered by the user regarding the current call. They will then be attached to that call and any agent can view these notes by right clicking on the active call to 'View Call History'.
- Click Apply.

Note Do not click Apply until you have completed both sections. The Apply function does not reappear which means you will not be able to complete further information.

See Also

Wrapup Codes

How to View Wrapup Codes

How to use Wrapup Codes

Wrapup Folders

FAQs

What is the easiest way to change my Location?

Click on your **Location** icon in the top toolbar. This icon displays your current Location and allows you to view/access the Change Locations screen.

See Also
FAQs
How do I revert back to only viewing the Tool Bars after Ive been in a full screen?
How do I Delete an Extension (Icon) from my Side Bar?
What is the easiest way to tell if I have any New messages?
Can I Record my greetings using IPFX Live Desktop?
Can I listen to Another Extensions messages?
How do I change Another Extensions Location?
What does it mean if some of the Icons in the Top Tool Bar are grey?
How do I Close IPFX Live Desktop?

How do I revert back to only viewing the Tool Bars after Ive been in a full screen?

If you have a 'full screen' showing, use the line button in the top right hand corner to minimize the screen and return to just the Tool Bar view.

See Also
FAQs
What is the easiest way to change my Location?
How do I Delete an Extension (Icon) from my Side Bar?
What is the easiest way to tell if I have any New messages?
Can I Record my greetings using IPFX Live Desktop?
Can I listen to Another Extensions messages?
How do I change Another Extensions Location?
What does it mean if some of the Icons in the Top Tool Bar are grey?
How do I Close IPFX Live Desktop?

How do I Delete an Extension (Icon) from my Side Bar?

Whilst in the folder you want to delete, right mouse click onto a clear shaded area and select the option **Remove Folder**.

See Also
FAQs
What is the easiest way to change my Location?
How do I revert back to only viewing the Tool Bars after Ive been in a full screen?
What is the easiest way to tell if I have any New messages?
Can I Record my greetings using IPFX Live Desktop?
Can I listen to Another Extensions messages?
How do I change Another Extensions Location?
What does it mean if some of the Icons in the Top Tool Bar are grey?
How do I Close IPFX Live Desktop?

What is the easiest way to tell if I have any New messages?

In the Side Tool Bar on the bottom bar you can read how many New messages you have in your mailbox. This information is also shown immediately below your extension icon in the Side Tool Bar.

See Also
FAQs
What is the easiest way to change my Location?
How do I revert back to only viewing the Tool Bars after Ive been in a full screen?
How do I Delete an Extension (Icon) from my Side Bar?
Can I Record my greetings using IPFX Live Desktop?
Can I listen to Another Extensions messages?
How do I change Another Extensions Location?
What does it mean if some of the Icons in the Top Tool Bar are grey?
How do I Close IPFX Live Desktop?

Can I Record my greetings using IPFX Live Desktop?

Yes. Refer to **Greetings** section in Changing Location Settings

See Also
FAQs
What is the easiest way to change my Location?
How do I revert back to only viewing the Tool Bars after Ive been in a full screen?
How do I Delete an Extension (Icon) from my Side Bar?
What is the easiest way to tell if I have any New messages?
Can I listen to Another Extensions messages?
How do I change Another Extensions Location?
What does it mean if some of the Icons in the Top Tool Bar are grey?
How do I Close IPFX Live Desktop?

Can I listen to Another Extensions messages?

'Yes' but only if you have that extension present in your Side Bar and know their Password.

See Also
FAQs
What is the easiest way to change my Location?
How do I revert back to only viewing the Tool Bars after Ive been in a full screen?
How do I Delete an Extension (Icon) from my Side Bar?
What is the easiest way to tell if I have any New messages?
Can I Record my greetings using IPFX Live Desktop?
How do I change Another Extensions Location?
What does it mean if some of the Icons in the Top Tool Bar are grey?
How do I Close IPFX Live Desktop?

How do I change Another Extensions Location?

Right-click on their extension icon, click **Set Location** and change their **Location** in the usual way.

For more information see

- Changing another extension's Location Directory
- Changing another extension's Location sidebar

See Also

FAQs

What is the easiest way to change my Location?

How do I revert back to only viewing the Tool Bars after Ive been in a full screen?

How do I Delete an Extension (Icon) from my Side Bar?

What is the easiest way to tell if I have any New messages?

Can I Record my greetings using IPFX Live Desktop?

Can I listen to Another Extensions messages?

What does it mean if some of the Icons in the Top Tool Bar are grey?

How do I Close IPFX Live Desktop?

What does it mean if some of the lcons in the Top Tool Bar are grey?

It means this feature is not supported by your current system.

See Also
FAQs
What is the easiest way to change my Location?
How do I revert back to only viewing the Tool Bars after Ive been in a full screen?
How do I Delete an Extension (Icon) from my Side Bar?
What is the easiest way to tell if I have any New messages?
Can I Record my greetings using IPFX Live Desktop?
Can I listen to Another Extensions messages?
How do I change Another Extensions Location?
How do I Close IPFX Live Desktop?

How do I Close IPFX Live Desktop?

Click directly onto the X at the top right hand side of the Top Tool Bar.

See Also
FAQs
What is the easiest way to change my Location?
How do I revert back to only viewing the Tool Bars after Ive been in a full screen?
How do I Delete an Extension (Icon) from my Side Bar?
What is the easiest way to tell if I have any New messages?
Can I Record my greetings using IPFX Live Desktop?
Can I listen to Another Extensions messages?
How do I change Another Extensions Location?
What does it mean if some of the Icons in the Top Tool Bar are grey?

Insight - Viewing Extension Details and Appointments

Note: This feature is only available if the IPFX Productivity Max module has been purchased.

Insight allows a user to divert calls to the IPFX Console Operator or a Call and Contact Centre Agent. When the call diverts through to the agent/operator assigned, the following screen appears, so that the agent can view specific instructions from - and information about - the extension's user.

😻 Insight: E	xtension	412										X
2.	m .			<u>8</u> 2		<u></u>		7	2	5	V	
Location	Dial	Office Extn	Voice Mail	Associate	Mobile	Home/Other	Pager	Hold For	Hold	Record	Release	
Main Use	er Details	Related Sci	nedule									
User:	Masina	Maher				Status:	Office					
From:						Reason:						
Greeting:												
1												
Operator]	Instructi	ons										
Call Histor	y											
Date		Time				Last Cont	act					
-											_	
										<u>O</u> K	⊆a	ncel

Example A staff member is out of the office, and has set up their IPFX voicemail system to allow callers to be diverted to the Operator. A customer calls the staff member's phone, listens to the voicemail greeting and - following the greeting's instructions - presses 0 to speak with the Operator.

When the Operator answers the call, the staff member's Insight screen appears on the console. The Operator can immediately see any Operator

Instructions left by the staff member. With this information the Operator is better equipped to deal with the customer's call.

Note Email, Chat and LCD messaging are only available on the IPFX for NEC platform.

Functionality from the top toolbar

- The Location can be changed from this point.
- Full Call Control is available (see Call Control (see "Call Control" on page 1)).
- Calls can be sent to:
 - The User's Office Extension/Associate.
 - Mobile.
 - Home or Other Number Listed.
 - Pager Number.
- A call can be put on 'Hold'.
- A call can be put on 'Hold For' another extension.
- A call can be Recorded into the voicemail of the Users extension.
- You can release the call you have on line.

Viewing Main Tab of Insight

Functionality within the Main Tab:

I <mark>ns</mark> ight: Exten	sion 412											×
æ. 2		3		<u>82</u>				Ħ			X	
cation Dia	I Offic	e Extr	Voice Mail	Associate	Mobile	Home/Othe	r Pager	Hold For	Hold	Record	Release	
1ain User Det	ails Relat	ed Sch	nedule									
J ser: Ma	isina Mahe	r				Status:	Office					
rom:					1	Reason:						
ireeting:												
Inorator Instr	uctions											
)perator <u>I</u> nstr	uctions											
)perator <u>I</u> nstr	uctions											
)perator <u>I</u> nstr	uctions											
)perator <u>I</u> nstr Call Histor y	uctions											
	uctions Time					Last Con	tact					
all History						Last Con	tact					
all History						Last Con	tact					
all History						Last Con	tact					
all History						Last Con	tact					
all History						Last Con	tact					
all History						Last Con	tact					
all History						Last Con	tact					
all History						Last Con	tact					

Note Above is an example of the IPFX Insight screen.

This Feature	Does This
User	Name of the User who has forwarded the calls.
From	CLI of the Caller.
Status	What Location the user is in.
Reason	Reason for the Call.
Greeting	If the user would like you to answer the phone in a specific manner, they can write the script here. This is an IPFX for NEC feature only.
LCD	Send an LCD Display message to a user's phone. This is an IPFX for NEC feature only.
Chat	Enables you to chat with the extension. This is an IPFX for NEC feature only.
Clear	Clears all LCD Message sent. This is an IPFX for NEC feature only.
Operator Instructions	This displays any operator instructions the user has left for you.
	This displays the history of the caller (both internal and external), eg: Customer A has called in three times over the last week.

This feature will also display any Call flow and/or notes from extensions within the company for each call if you place your cursor over the _____. This will display the details screen as shown below.

Cal Parties Notes	
all Parties Notes May 31 2004 12:43PM : VM Port1 (8401) and Robyn Waters (Analog) (447)	_
	_
[Close

Call History

This is only visible when on a live call.

See Also

Insight - Viewing Extension Details and Appointments

Viewing User Tab of Insight

Viewing Related Tab of Insight

Viewing Schedule Tab of Insight

Viewing User Tab of Insight

Functionality within the User Tab

Insight						2				
Cation Di	IL . U	n Voice Mail			Gener/Other		Hold For		Release	
Main User De	etails Related	Schedule								
Aiscellaneou	s Information:									
De	escription					Value				
Description		Building (Ine							
Car Registration	h in the second s									
Access No										
Building Level										
lotes:				_				 		
Position	Product and	Training Direct								
	Product and	-	lor	_						
-	Product and Documentation	-	lor	_						
Position: Department: Begion:		-	lor	_						
- Qepartment:	Documentatio	-	.01	_						

This Feature

Does This

Miscellaneous Information	Shows miscellaneous information from the Details tab of the user's Properties screen.
Notes	Shows information from the Notes field of the Details tab of the user's Properties screen.
Position	User's Position.
Department	User's Department.
Region	Region where the User is located.

See Also

Insight - Viewing Extension Details and Appointments Viewing Main Tab of Insight Viewing Related Tab of

Insight Viewing Schedule Tab of Insight

Viewing Related Tab of Insight

Functionality within the Related Tab

This shows any Internal and/or External Relationships the User has put in place, eg: who the user specifies as the Technical Advisor, Administration Contact, Secretary, Accountant, etc.

To transfer a call in Insight

- 1. Select Dial button for Call Control.
- 2. Select Blind or Supervised Transfer depending on your requirements.
- 3. To Cancel the transfer, select Call Control and Cancel.

or

- 1. Double Click on the Related Extension/Contact to transfer the call.
- 2. Select Release.

lated Extensions: Name	Fielsüonship
418 - Robyn Waters	Documentation
419 - Spare Extn	Training
451 - Aaron Beveridge	Finance
457 - Joanne Hulme	Projects
Contact	Relationship
Contact	headonship

This Feature

Does This

Related Extension Name	Internal Extension Number and Name of the Relationship Contact.
Related Extension Relationship	How this person relates to the extension's position and why the Operator/Agent can contact this person in your absence.
Related Contacts	Contact Description of an External Contact.
Related Contact Relationship	How this contact relates to the extension's position and why the Operator/Agent can contact this person in the extension's absence.

See Also

Insight - Viewing Extension Details and Appointments

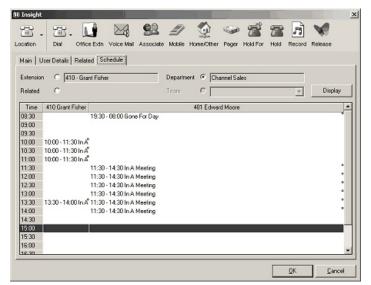
Viewing Main Tab of Insight

Viewing User Tab of Insight

Viewing Schedule Tab of Insight

Viewing Schedule Tab of Insight

Functionality within the Schedule Tab



This Feature	Does This
Extension	Displays scheduled appointments for the selected extension
Related	Displays scheduled appointments for the selected extension and related extensions.
Department	Displays scheduled appointments for all extensions in the selected extension's department.
Team	Displays scheduled appointments for the selected extension's team.
Display	Refreshes the display view of the Appointments.
•	If you place your cursor over this red dot, the contacts appointment details will display.

Note If your appointment does not have a 'key word' specified, the appointment will not display in the Schedule Tab.

See Also

Insight - Viewing Extension Details and Appointments

Viewing Main Tab of Insight

Viewing User Tab of Insight

Viewing Related Tab of

Insight

Suppressing Voice Capture



Note: Voice capture suppression is only available if specifically enabled by your organisation. Check with your Administrator whether you can use voice capture suppression.

About voice capture

At any time, your calls may be recorded by the IPFX system: either continuously as part of your organisation's standard policy, or on ad hoc basis by a supervisor.

However, under certain circumstances for example, for legal reasons you may wish to prevent a call from being recorded. IPFX calls this ability *voice capture suppression*.

To prevent a call from being recorded

- 1. Contact your organisation's IPFX Administrator to obtain the voice capture suppression code.
- During the call, enter the voice capture suppression code using the keypad on your phone. Don't spend too long entering the code: you only have limited amount time to complete the sequence after pressing the first key (usually 2 seconds, but check with your Administrator).

Notes:

- Voice Capture suppression may be initiated by either party in a call.
- Voice Capture Suppression can only prevent calls from being recorded by the IPFX System. It cannot prevent calls from being recorded by external parties to a phone call.
- On a call where an internal extension has dialled your *direct dial* number (as opposed to your extension number), Voice Capture suppression will only prevent the call from being recorded on your own extension. Both sides of the conversation may still be recorded from the other extension.

1. The Location screen for your extension will appear:

ocation - 301	j-	P	(5	Ő	5)	5	•	H	> i	9		
Time Joknown	4		Mar	ch 2	006					Ap	ril 20	006		•
12:15 AM	27 6 13 20 27	28 7 14 21 28	1 8 15 22 29	2 9 16 23 30	3 10 17 24 31	4 11 18 25	5 12 19 26	3 10 17 24 1	4 11 18 25 2	5 19 26 3	6 13 20 27 4	7 14 21 28 5	1 8 15 22 29 6	2 9 16 23 30 7
ffice perator Instructions	,													ear
														~
								Г		<u>0</u> K	_		ance	

- 2. Click on the specific **Location** icon that corresponds to your availability.
- 3. The IPFX system has been set up to recognize the standard working hours of your company or department. It will estimate when you are likely to return to your desk. You can over-ride the default return time by selecting a specific return time from the list at the left of the Location screen. If you will be away for an extended period (for example, on holiday or away on business) select the date of your return from the calendar at the right of the screen.
- 4. Click **OK** to save your new location.

See Also

Setting your location in IPFX Live Desktop

Setting your location using a menu shortcut