IPFX Console



Product version 4.3 SP4

About This Guide

The purpose of this document is to provide the user with information on how to use this IPFX product.

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.
DIR ✓	Information that applies to the IPFX Director platform only.
©CM ✓	Information that applies to the IPFX for CallManager platform only.
NEC V	Information that applies to the IPFX for NEC platform only.

See Also

About This Guide

Related Documentation

Getting Help

Supported phones

Related Documentation

IPFX Client Technical manual

Setting up multiple Console users on one PC

See Also

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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 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: 0870 850 2058

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

See Also

About This Guide

Typographical Conventions

Related Documentation

Supported phones

Supported phones

IPFX Console is designed to work with the following types of IP phone:

- Cisco 7940
- Cisco 7960
- IPFX Softphones

Other phone models may have limited functionality and are not supported.

See Also

About This Guide

Typographical Conventions

Related Documentation

Getting Help

Before You Begin

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

- 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 #

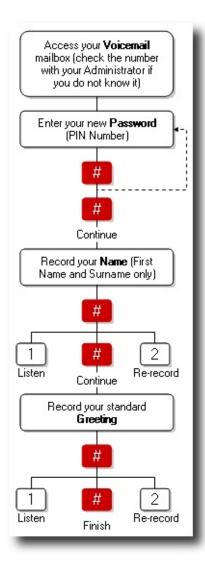
- Press 1 to Listen to your greeting; or Press 2 to Re-record
- 10. Press # to Finish and Hang Up (when satisfied with your greeting)

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



Logging in and out of Console

The Operator Queue

Before calls arrive at your IPFX Console, they have been processed by an *operator queue*. The queue decides the order in which calls are delivered to you, plays any standard greetings or announcements and otherwise manages incoming calls.

The operator queue can be in two states: closed, or open

In its closed state the queue will not deliver calls to your Console; it may direct calls to another queue or extension, or it may invite callers to leave a voicemail message. The exact behaviour depends on how the queue has been configured by your Administrator.

In its open state, the operator queue will deliver calls to you - provided that you are logged into the queue.

You may need to open and close the queue manually, or it may follow an automatic schedule

If the queue is not configured to run on a schedule, you will be responsible for opening it manually when you start work and closing it down when you leave at the end of the day.

Alternatively, your Administrator may have set up the operator queue to follow an automatic schedule: opening itself during business hours, and closing itself down after hours or on holidays.

Tip! Find out from your Administrator whether your organisation's Operator queue needs to be opened manually or whether it follows an automatic schedule.

See Also

Logging in and out of Console

Starting up the Console

Logging out of the Console

Taking a break from the Console

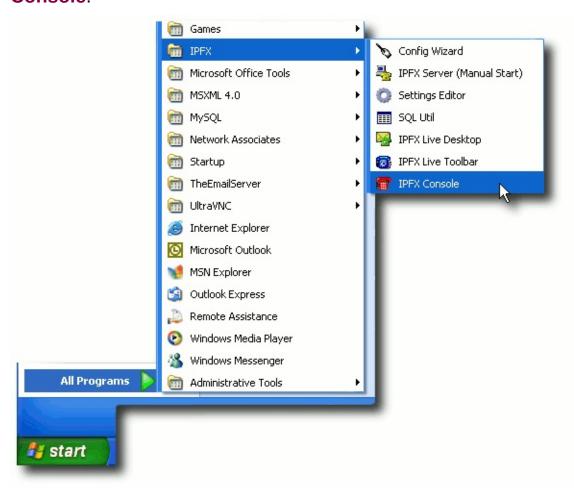
Leaving the Console during an Emergency

Starting up the Console

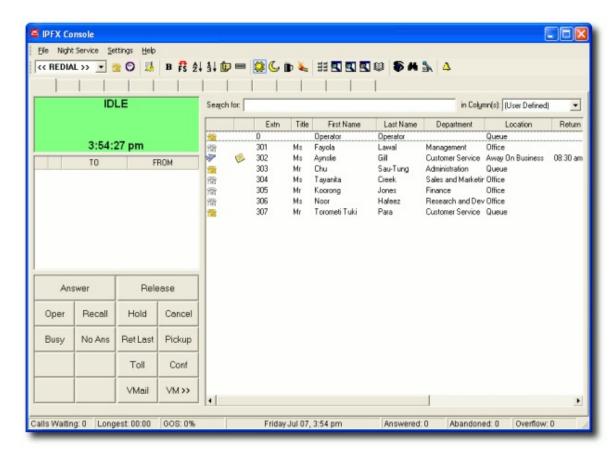
If the Console is not already running, open it when you arrive at work and are ready to take calls.

To open the Console application:

Click on the Start Menu, then click All Programs > IPFX > IPFX
 Console.



2. In a few moments the Console window will appear:



In order to begin receiving calls, you must be logged into the operator queue, and the queue must be open.

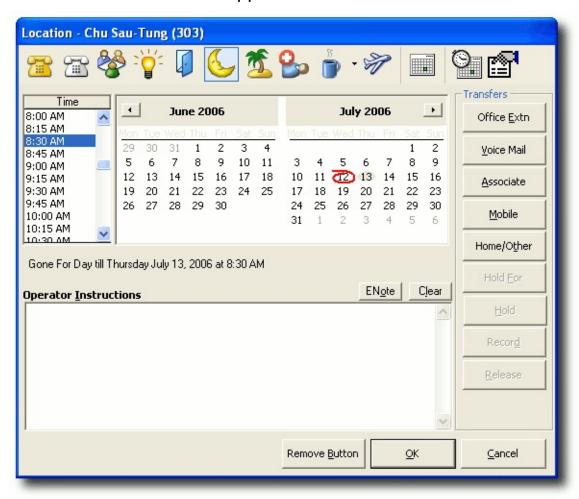
Logging into the Operator queue

1. Set your location to **Queue** by clicking on the toolbar's Location button at the upper left of the console window:

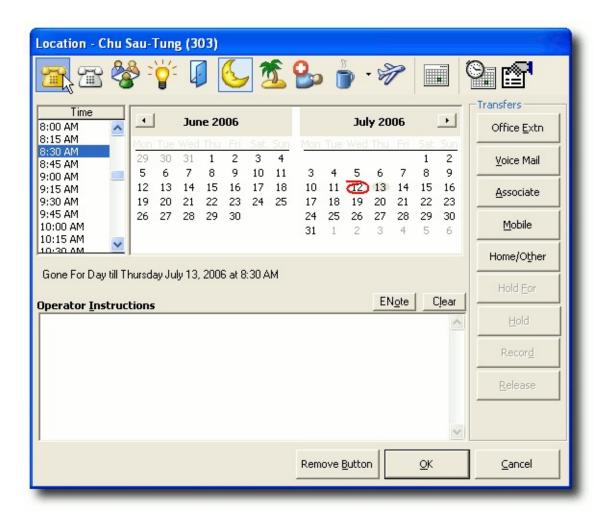


In the illustration above, the Location button's moon icon shows us that the Operator's location is currently "Gone for the Day". The Location button could appear as any one of several location icons, but it always remains in the same place on the toolbar. You can only receive calls from the queue when the location button's icon looks like a yellow phone (i.e. the Queue location).

2. Your Location screen will appear:



3. Click the yellow phone icon to set your location to Queue:



- 4. Click OK.
- 5. The location button in your Console toolbar now looks like a yellow phone, indicating that you are logged into the queue:



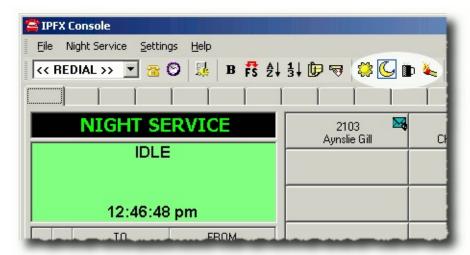
If your organisation's Operator queue follows an automatic schedule, you are now ready to receive calls.

Otherwise, you must perform one more procedure: opening the queue.

Manually opening the Operator queue

1. Locate the four Console Queue mode buttons in the toolbar (Day

Service mode, Night Service mode, Break mode and Fire/Emergency mode):



In the illustration above, the blue square around the moon icon tells us that the Console is set to Night Service. In Night Service mode, the Operator queue is closed. To receive calls, you must open the Operator Queue by setting the Console to Day Service (the sun icon).

2. Click on the Day Service button:



3. The Console will enter Day Service mode. In Day Service mode, the Operator queue is open:



4. You are now ready to receive calls.

See Also

Logging in and out of Console

The Operator Queue

Logging out of the Console

Taking a break from the Console

Leaving the Console during an Emergency

Logging out of the Console

When you leave for the evening, it's important that you log yourself out of the Console.

Logging out prevents calls from being delivered to your (unattended) phone, and ensures that callers are diverted somewhere more useful to an automated announcement, or to another queue, for example. Your Administrator has information about what happens to the calls; as a Console Operator all you need to do is log out. The IPFX system takes care of the rest.

If your organisation's Operator queue follows a automatic schedule, simply log yourself out of the Operator Queue (see below). Otherwise, you will need to manually close the queue first.

Manually closing the Operator queue

 Locate the four Console Queue mode buttons in the toolbar (Day Service mode, Night Service mode, Break mode and Fire/Emergency mode):

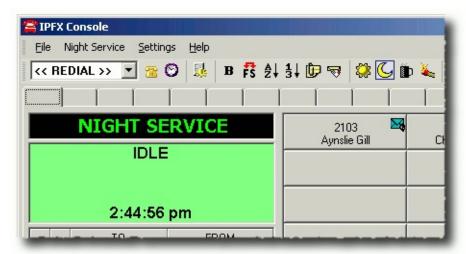


In the illustration above, the blue square around the sun icon tells us that the Console is set to Day Service. In Day Service mode, the Operator queue is open. To log out of Console, you must close the Operator Queue by setting the Console to Night Service (the moon icon).

2. Click on the Night Service button:



3. The Console will enter Night Service mode. In Night Service mode, the Operator queue is closed:



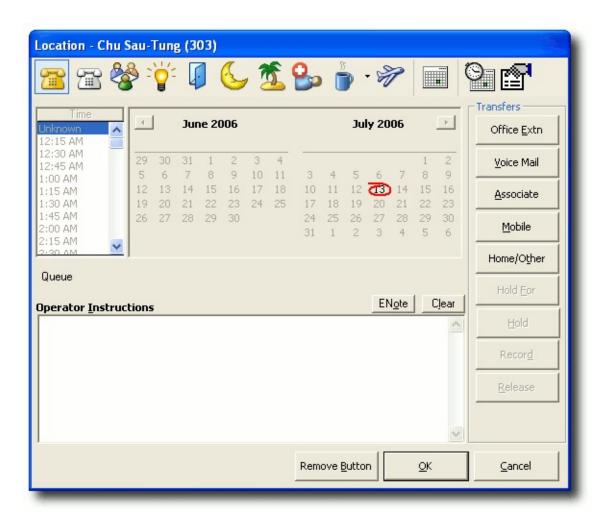
4. You are now ready to log out of the Operator queue.

Logging out of the Operator queue

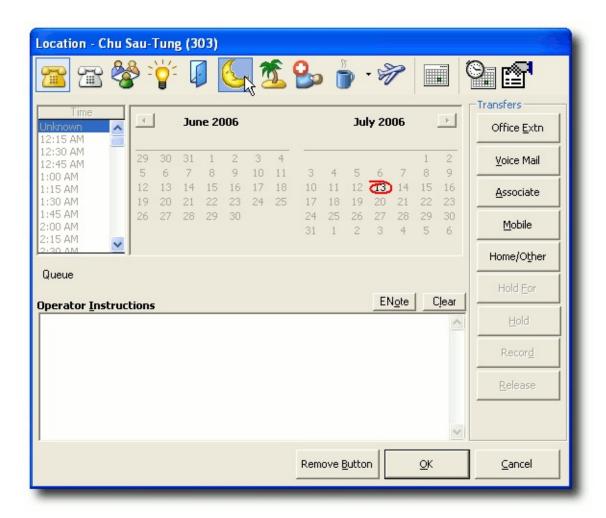
1. Set your location to **Gone for the Day** by clicking on the toolbar's Location button at the upper left of the console window:



2. Your Location screen will appear:



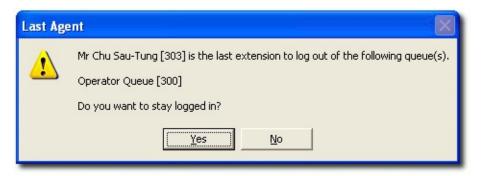
3. Click the moon icon to set your location to **Gone for the Day**:



- 4. Click OK.
- 5. The location button in your Console toolbar now looks like a moon, indicating that you are logged out of the queue and gone for the day:



Note: You may receive a warning message if you attempt to log out of the operator queue while the queue is still open and you are its only logged-in agent:



This message is alerting you to the fact that there is no-one else available to answer calls arriving at the (open) operator queue, and the IPFX system is therefore giving you the opportunity to remain logged into the queue. Before clicking "No" to this message, please check with your IPFX Administrator that the queue is configured to handle incoming calls when no active agents are logged in.

6. You have now logged out of the Console.

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The Operator Queue

Starting up the Console

Taking a break from the Console

Leaving the Console during an Emergency

Taking a break from the Console

How you take a break from the Console depends on whether you are the only Console Operator or one of many agents in the Operator queue.

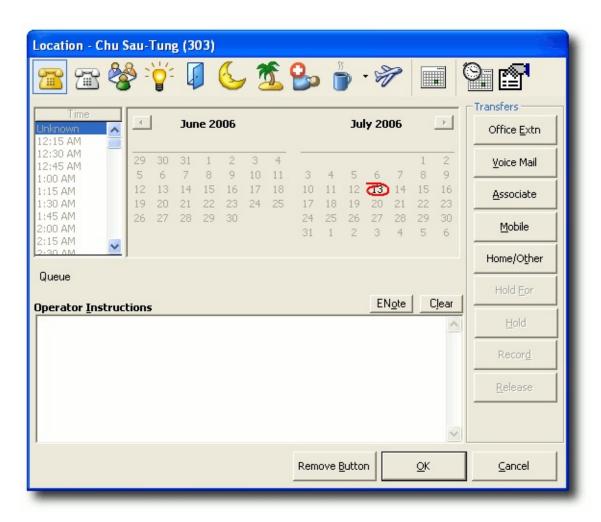
To take a break if you are one of several agents in the Operator queue:

If other agents are logged into the Operator queue, simply remove yourself from the queue by setting your location to "On a Break".

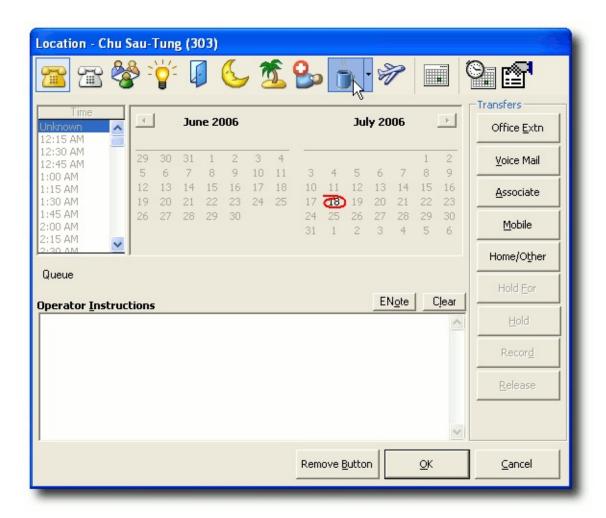
1. Set your location to **On a Break** by clicking on the toolbar's Location button at the upper left of the console window:



2. Your Location screen will appear:



3. Click the coffee cup icon to set your location to **On a Break**:



- 4. Click OK.
- 5. The location button in your Console toolbar now appears with a coffee cup icon, indicating that you are logged out of the queue and on a break:



6. You are now logged out of the queue. Note that you may need to manually set your location back to Queue (the yellow phone icon) when you return from your break.

To take a break if you are the only Console operator:

If you are the only agent receiving calls from the Operator queue, you may be able to manually close the queue using the Break mode button on the Console toolbar.

Note: Before manually closing the queue, check with your Administrator to see if this procedure can be used in your organisation.

 Locate the four Console Queue mode buttons in the toolbar (Day Service mode, Night Service mode, Break mode and Fire/Emergency mode):



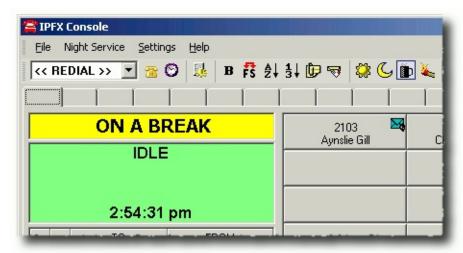
In the illustration above, the blue square around the sun icon tells us that the Console is set to Day Service. In Day Service mode, the Operator queue is open. If leaving the Console unattended during a break, you must close the Operator Queue by setting the Console to Break Mode (the coffee cup icon).

2. Click on the Break Mode button:



3. The Console will enter Break Mode. In Break Mode, the Operator

queue is closed:



4. Remember to set the Console to Day Service (the sun icon) when you return from your break.

See Also

Logging in and out of Console

The Operator Queue

Starting up the Console

Logging out of the Console

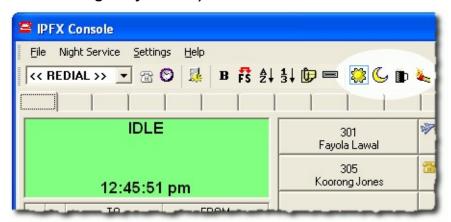
Leaving the Console during an Emergency

Leaving the Console during an Emergency

If you need to leave the Console unattended during a fire or other emergency, you may be able to manually close the queue using the Fire/Emergency mode button on the Console toolbar.

Note: Before manually closing the queue, check with your Administrator to see if this procedure can be used in your organisation.

 Locate the four Console Queue mode buttons in the toolbar (Day Service mode, Night Service mode, Break mode and Fire/Emergency mode):

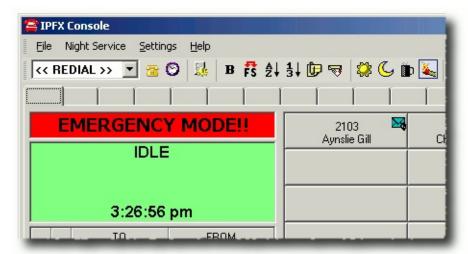


In the illustration above, the blue square around the sun icon tells us that the Console is set to Day Service. In Day Service mode, the Operator queue is open. If leaving the Console unattended during an emergency, you must close the Operator Queue by setting the Console to Fire/Emergency Mode (the lit match icon).

2. Click on the Fire/Emergency Mode button:



3. The Console will enter Fire/Emergency Mode. In Fire/Emergency Mode, the Operator queue is closed:



When the emergency is over and you return to your desk, set the Console back to Day Service (the sun icon).

See Also

Logging in and out of Console

The Operator Queue

Starting up the Console

Logging out of the Console

Taking a break from the Console

Using locations

In This Section

What are locations?

Setting locations in Console

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.

In This Section

Locations and default return times

See Also

<u>Using locations</u>
<u>Setting locations in</u>
Console

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.

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.

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



Office (White phone)

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.



In A Meeting

1 hour



or 💥

Do Not Disturb or Prime Time

1 hour

Note: The Prime Time module must be purchased separately.



Gone Out

1 hour



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.



On A Break

15 minutes.



Away On Business

Beginning of business, the next day.

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 locations in Console

Setting your own location to anything other than **Queue** will prevent you from receiving calls from the Operator queue.

For this reason, IPFX Ltd. recommends that you avoid changing your own location, except as required to <u>log in and out of the Console</u>.

You may be expected to set locations for other extensions, however.

In This Section

Changing another
extension's Location using
the Directory

Changing another extension's Location using DSS keys

Setting a location for multiple extensions with Console

See Also

<u>Using locations</u>

What are locations?

Changing another extension's Location using the Directory

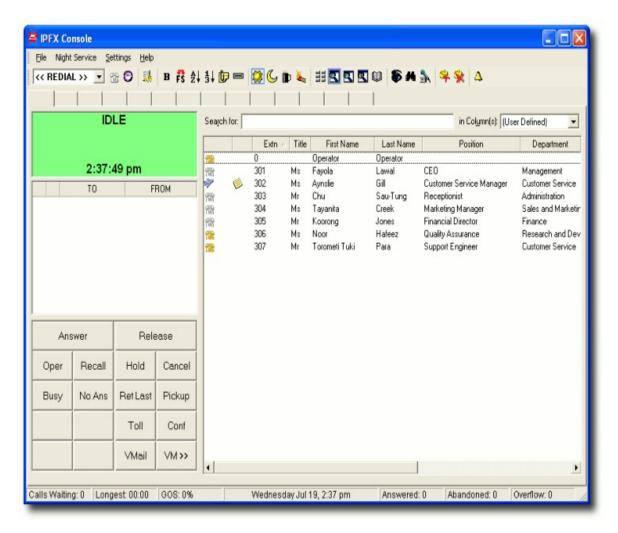
To change the Location of another extension using the Directory:

1. Locate the Directory Search buttons on the Console toolbar:



2. Click one of the Directory Search buttons to open the Directory.

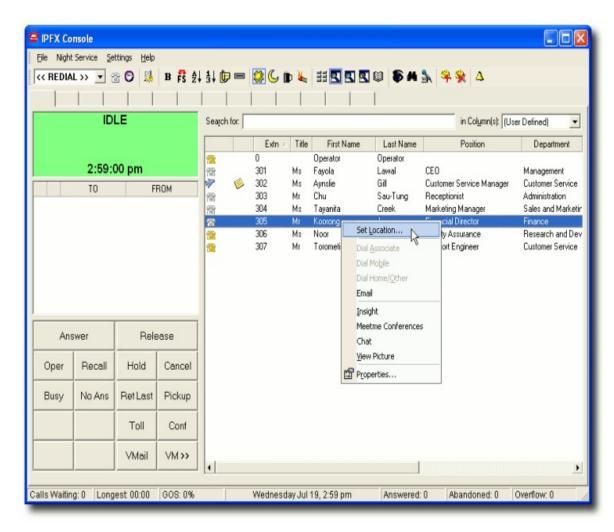
Each Directory Search button displays the Directory in a different sort order (from left to right: by extension number, by first name, by last name):



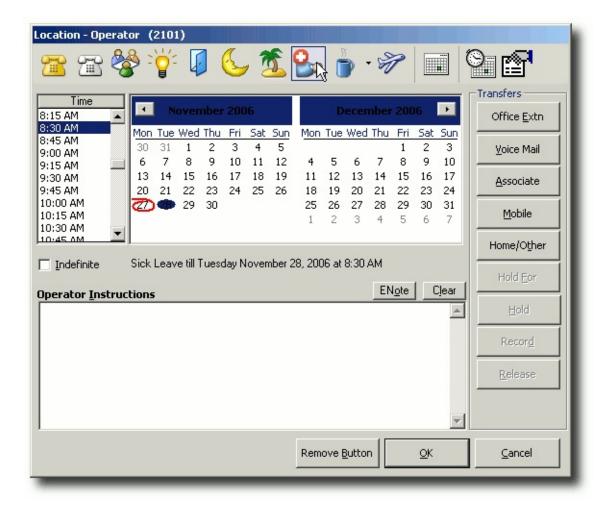
3. Right-click on the extension whose location you wish to change.

Depending on how your system is configured, the extension's *location* screen may appear immediately (in which case, proceed to step 4) or a context menu may appear.

Click **Set Location...** from the context menu to open the location screen:



4. The Location screen will appear:



- 5. Click on a location button to set a new location for this extension.
- 6. **(Optional)** Set a *return time* by selecting the appropriate time and date from the location screen's calendar. The return time tells callers and colleagues when the extension's owner is expected to be back in the office.

Special return times:

Select **Unknown** from the time list if you know the day, but not the time, that owner of the extension will return.

Attempting to set an Unknown return time for today's date will set the return time to the beginning of the next business day.

Select the **Indefinite** checkbox to set the extension's location until further notice. Locations set to an Indefinite return time do not expire.

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

See Also

Setting locations in Console

Changing another extension's Location using DSS keys

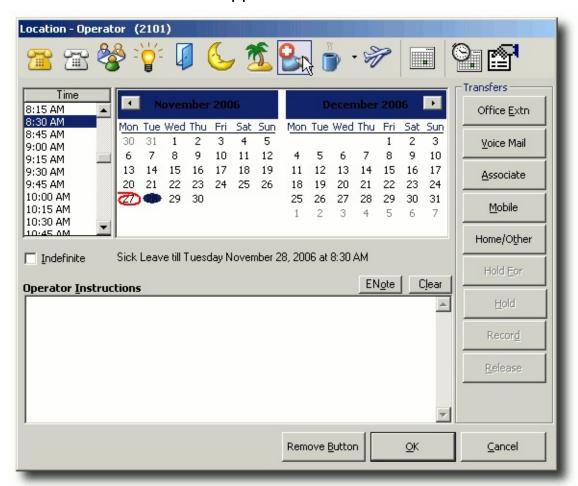
Setting a location for multiple extensions with Console

Changing another extension's Location using DSS keys

1. Click the View DSS keys button in the Console toolbar:



- 2. Right-click on the DSS key of the extension whose location you wish to change:
- 3. The Location screen will appear:



- 4. Click on a location button to set a new location for this extension.
- 5. **(Optional)** Set a *return time* by selecting the appropriate time and

date from the location screen's calendar. The return time tells callers and colleagues when the extension's owner is expected to be back in the office.

Special return times:

Select **Unknown** from the time list if you know the day, but not the time, that owner of the extension will return.

Attempting to set an Unknown return time for today's date will set the return time to the beginning of the next business day.

Select the **Indefinite** checkbox to set the extension's location until further notice. Locations set to an Indefinite return time do not expire.

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

See Also

Setting locations in Console

Changing another extension's Location using the Directory

Setting a location for multiple extensions with Console

Setting a location for multiple extensions with Console

Note You must have the <u>Enable Directory Context Menu</u> setting turned on in order to perform this procedure.

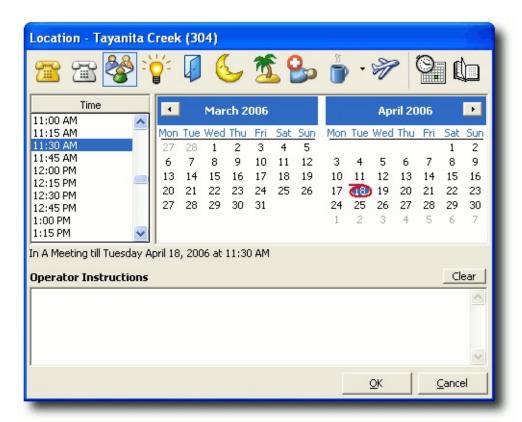
You can set multiple extensions to the same location using the Directory.

1. Click on the directory button to open the directory:



- 2. Hold down the CTRL key and click on the extensions whose locations you wish to change.
- 3. Right-click on the selection to display the shortcut menu.
- 4. Select Set Location...

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



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

The **Set Multiple Locations** screen appears:



7. Click Yes.

All the selected extensions will now show the new location.

See Also

Setting locations in Console

Changing another extension's Location using the Directory

Changing another extension's Location using DSS keys

Basic Call Handling

Keyboard Call Handling

You can use the NUMERIC keyboard to perform basic call handling functions:

Press this key	To do this
minus -	Transfer a call
plus +	Answer a call
Enter	Dial
. Del	Hangup

See Also

Basic Call Handling

Answering an Incoming

Call

<u>Transferring an External</u>

<u>Call</u>

Joining two incoming calls

Answering Recalled Calls

Retrieving the Last

Transferred Call

Retrieving any Transferred

Call

Calling an Extension

Directly

Answering a Ringing

Extension

<u>Toggling Between Two</u>

Callers

Intruding on a Call

To Place a Call on Hold

Taking a Call off Hold

Calling an External

Number Directly

Answering an Incoming Call

A new incoming call will always be shown as a RED phone () on your IPFX Console. The LCD Screen will tell you if the incoming call is an External or Internal call.

To answer an incoming call:

- 1. Click on the **Answer** Button.
- 2. Greet the caller in your company's chosen manner, i.e. "Welcome to the XYZ company".

See Also

Basic Call Handling

Keyboard Call Handling

Transferring an External Call

Joining two incoming calls

Answering Recalled Calls

Retrieving the Last Transferred Call

Retrieving any Transferred Call

Calling an Extension Directly

Answering a Ringing Extension

Toggling Between Two Callers

Intruding on a Call

To Place a Call on Hold

Taking a Call off Hold

Calling an External Number Directly

Transferring an External Call

When you answer the incoming call, the telephone icon will change from a Red to a Yellow phone () with the handset up in the air.

To transfer a call using on-screen DSS keys

- 1. Tell the caller you are transferring them now.
- 2. Click on the appropriate DD Button.

If you have **Release (Auto)** enabled, the call will automatically transfer to the extension you have selected and disconnect, otherwise:

3. Click on the Release Button.

To transfer a call using the keyboard

- 1. Press the **Minus** key on your keyboard.
- 2. Enter the number of the extension to which you want to transfer the call.
- 3. Press **Enter** to complete the transfer.

See Also

Basic Call Handling

Keyboard Call Handling

Answering an Incoming

<u>Call</u>

Joining two incoming calls

Answering Recalled Calls

Retrieving the Last

Transferred Call

Retrieving any Transferred

Call

Calling an Extension

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Answering a Ringing

Extension

In This Section

Releasing a Call Automatically (Blind Transfer)

Releasing a Call Manually (Supervised Transfer)

Toggling Between Two Callers

Intruding on a Call

To Place a Call on Hold

Taking a Call off Hold

Calling an External Number Directly

Releasing a Call Automatically (Blind Transfer)

To eliminate having to click the **Release** button after each call, set IPFX Console to **Release (Auto)**. This will allow you to Answer a call, transfer to an extension and automatically release the caller to that extension.

To enable automatic release:

- 1. Right-click on the Release button.
- 2. The text on the release button will now read Release (Auto).

Repeat the process to set the Release button back to Manual Release.

Note: If the button reads **Release**, the Console is set to manual release. If the button reads **Release (Auto)** the Console is set to automatic release.

Ensure that the Console is set to manual release when transferring callers to an external number.

See Also

Transferring an External Call

Releasing a Call Manually (Supervised Transfer)

Releasing a Call Manually (Supervised Transfer)

If you do not want to use the **Release (Auto)** function when transferring a call, you will have to release each call from IPFX Console manually before answering any new calls.

This feature should be used when you wish to announce a call to a staff member before completing the transfer.

To perform a supervised transfer:

- 1. Click the **Answer** Button to answer a call.
- 2. Ensure that the **Release** button is set to manual release.
- 3. Click the appropriate DSS key and announce the caller.
- 4. Click the Release Button to complete the transfer.

Note: You can change between automatic and manual release during a live call. This will NOT affect the call you currently have on the line. Right click on the **Release** button to change the setting.

See Also

Transferring an External Call

Releasing a Call Automatically (Blind Transfer)

Joining two incoming calls





PBX Dependent Feature!

To join two incoming calls in a conference:

- 1. Answer the first incoming call.
- 2. Click the **Hold** button to place the first call on hold.
- 3. Call the second conference participant...
- 4. When the second participant answers, click the **Join** button.
- 5. Double-click on the held call in the call window.
- 6. All three parties are now conferenced together.
- 7. You may now hang up, or click the **Release** button to leave the conference. The two other parties will remain in the conference.

See Also

Basic Call Handling

Keyboard Call Handling

Answering an Incoming Call

Transferring an External Call

Answering Recalled Calls

Retrieving the Last Transferred Call

Retrieving any Transferred Call

Calling an Extension Directly

Answering a Ringing Extension

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Intruding on a Call

To Place a Call on Hold

Taking a Call off Hold

Calling an External Number Directly

Answering Recalled Calls

To Answer a Busy/No Answer Recall

When you have transferred a call to an extension that does not have Voicemail, the call will recall back to the Operator.

To answer the call, you can either:

Click Answer

or

Click Recall

or

Double-click on the call ringing in your display

To Answer a Recall from Voicemail

When you have transferred a call to an extension that does have Voicemail and the caller presses 0, the call will come back to the Operator.

To answer the call, you can either:

Click Answer

or

Click Oper

or

Double-click on the call ringing in your display

See Also

Basic Call Handling

Keyboard Call Handling

Answering an Incoming Call

Transferring an External Call

Joining two incoming calls

Retrieving the Last Transferred Call

Retrieving any Transferred Call

Calling an Extension Directly

Answering a Ringing Extension

Toggling Between Two Callers

Intruding on a Call

To Place a Call on Hold

Taking a Call off Hold

Calling an External Number Directly

Retrieving the Last Transferred Call

In the situation where you have transferred a call to the wrong extension and you want to retrieve the call:

Click the Ret Last button

This will retrieve the LAST transferred call only. You will be reconnected to the caller unless the call has been answered (by a person, or by voicemail). You can now transfer the caller again as usual.

See Also

Basic Call Handling

Keyboard Call Handling

Answering an Incoming Call

Transferring an External Call

Joining two incoming calls

Answering Recalled Calls

Retrieving any Transferred Call

Calling an Extension Directly

Answering a Ringing Extension

Toggling Between Two Callers

Intruding on a Call

To Place a Call on Hold

Taking a Call off Hold

Calling an External Number Directly

Retrieving any Transferred Call

To retrieve a call that you have transferred:

- 1. Click on the Pick Up Button.
- 2. Click on the DSS key of the extension to which you have transferred the call.

You will now be reconnected with the caller, unless the call has been answered (by a person or by voicemail). You can now transfer the caller again as usual.

See Also

Basic Call Handling

Keyboard Call Handling

Answering an Incoming Call

Transferring an External Call

Joining two incoming calls

Answering Recalled Calls

Retrieving the Last Transferred Call

Calling an Extension Directly

Answering a Ringing Extension

Toggling Between Two Callers

Intruding on a Call

To Place a Call on Hold

Taking a Call off Hold

Calling an External Number Directly

Calling an Extension Directly

To call an extension directly

• Click on the appropriate DSS key Button.

See Also

Basic Call Handling

Keyboard Call Handling

Answering an Incoming Call

Transferring an External Call

Joining two incoming calls

Answering Recalled Calls

Retrieving the Last Transferred Call

Retrieving any Transferred Call

Answering a Ringing Extension

Toggling Between Two Callers

Intruding on a Call

To Place a Call on Hold

Taking a Call off Hold

Calling an External Number Directly

Answering a Ringing Extension

If you hear a phone ringing on an individual's extension, and you know no one is available to answer that call, you can pick the call up from IPFX Console.

To pickup a call from a ringing extension:

- 1. Click on the Pick Up button.
- 2. Click on the appropriate DSS key.

You can now talk to the caller.

See Also

Basic Call Handling

Keyboard Call Handling

Answering an Incoming Call

Transferring an External Call

Joining two incoming calls

Answering Recalled Calls

Retrieving the Last Transferred Call

Retrieving any Transferred Call

Calling an Extension Directly

Toggling Between Two Callers

Intruding on a Call

To Place a Call on Hold

Taking a Call off Hold

Calling an External Number Directly

Toggling Between Two Callers



PBX Dependent Feature!

In the situation where you manually transfer a call through to a particular staff member and they require further information prior to you releasing the call through to them:

- 1. Answer the incoming call (external party).
- 2. Ensure the **Release** button is set to <u>manual release</u>.
- 3. Click the appropriate DSS key.
- 4. Speak to the staff member.
- 5. To toggle between the two calls click the **SCR/DEST** button.
- 6. When you are ready to connect the two parties, click **Release**.

See Also

Basic Call Handling

Keyboard Call Handling

Answering an Incoming Call

Transferring an External Call

Joining two incoming calls

Answering Recalled Calls

Retrieving the Last Transferred Call

Retrieving any Transferred Call

Calling an Extension Directly

Answering a Ringing Extension

Intruding on a Call

To Place a Call on Hold

Taking a Call off Hold

Calling an External Number Directly

Intruding on a Call



PBX Dependent Feature!

Note: In order to intrude on a call, you must (i) be an Administrator and (ii) enable the **Phone Intrude** feature level in the IPFX Server configuration.

The Intrude function enables you to interrupt a colleague's call, should you need to deliver an urgent message to that colleague.

To Add an Intrude Button on your IPFX Console

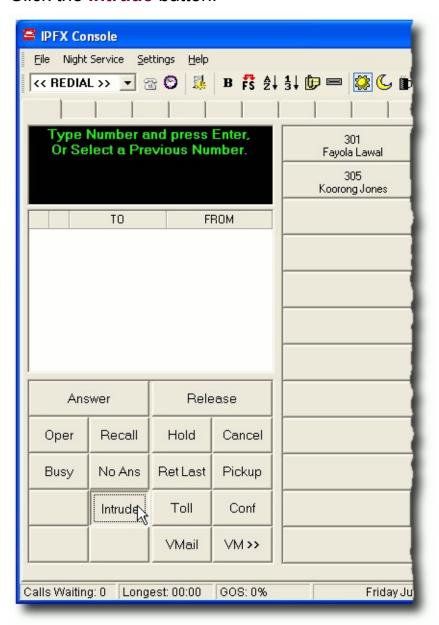
1. Right click on a blank button in your left hand side of the screen.



- 2. Select the **Intrude** feature.
- 3. Click OK.

To Intrude on a call:

1. Click the **Intrude** button:



- 2. Click the appropriate DD Button.
- 3. Your phone will ring. Answer the call.
- 4. Speak to the colleague.
- 5. Hang up when you have finished.

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

Basic Call Handling

Keyboard Call Handling

Answering an Incoming Call

Transferring an External Call

Joining two incoming calls

Answering Recalled Calls

Retrieving the Last Transferred Call

Retrieving any Transferred Call

Calling an Extension Directly

Answering a Ringing Extension

Toggling Between Two Callers

To Place a Call on Hold

Taking a Call off Hold

Calling an External Number Directly

To Place a Call on Hold

To Hold a Caller at the IPFX Console

- 1. Ask the caller to hold
- 2. Click the **Hold** option.

The held call will recall back to the IPFX Console after a pre-determined interval. This interval may be changed by modifying the Hold Recall setting (see "" on page 53).

To Hold a Caller for a Specific Extension

Use the **Hold For** function when you want to place a caller on hold for a particular, busy, extension. The extension number will be displayed along with the call, to remind you for whom the caller is on hold. There are two ways of using the **Hold For** function. These are:

- Ask the caller to Hold
- 2. Click the **Hold For** button
- 3. Click the appropriate DSS key

OR:

- 1. Ask the caller to Hold
- 2. Right-click on the appropriate DSS key.
- 3. Select Hold For option

The call will remain on hold indefinitely, or until the called party's extension becomes available. When this occurs, the call will begin to ring on the extension.

If the ringing call is not answered within 10 seconds, the call will return to the Console operator instead of going to the extension's voicemail; the system assumes that callers are on 'hold for' precisely because they do not wish to leave voicemail.

Note: You cannot put a caller on 'Hold For' for an extension that is set to a location other than **Office** or **Queue**.

To Return a Call to Hold Without Answering

A held call automatically returns to the IPFX Console after a certain amount of time. Such calls can be sent back to hold without being answered by the operator.

- 1. Locate the ringing call in the list at the left of the screen.
- 2. Right-click on the call.
- 3. Click **Hold** from the context menu.

To change the length of time that a held call will remain on hold before being returned to the IPFX Console

- 1. Click the **Options** button in the IPFX Console Toolbar.
- 2. Select the **Settings** Tab.
- 3. Change the **Hold Recall** timer to the time you wish for calls to recall back to the IPFX Console.

Note: The Hold For function will not automatically recall back to the IPFX Console, however you can retrieve the held call by double clicking on it.

See Also

Basic Call Handling

Keyboard Call Handling

Answering an Incoming Call

Transferring an External Call

Joining two incoming calls

Answering Recalled Calls

Retrieving the Last Transferred Call

Retrieving any Transferred Call

Calling an Extension Directly

Answering a Ringing Extension

Toggling Between Two Callers

Intruding on a Call

Taking a Call off Hold

Calling an External Number Directly Adding a note to a call

Taking a Call off Hold

When you put a caller on **Hold** OR **Hold For**, you are still able to view the call on your IPFX Console.

To retrieve a call from hold

Double-click directly on the Held Call displayed on the screen.

You will now be able to talk to the caller, or **Transfer** the call, or place the call back on **Hold** as required.

See Also

Basic Call Handling

Keyboard Call Handling

Answering an Incoming Call

Transferring an External Call

Joining two incoming calls

Answering Recalled Calls

Retrieving the Last Transferred Call

Retrieving any Transferred Call

Calling an Extension Directly

Answering a Ringing Extension

Toggling Between Two Callers

Intruding on a Call

To Place a Call on Hold

Calling an External Number Directly

Calling an External Number Directly

To call an External number directly:

- 1. Click the **Line** button on the IPFX Console. DO NOT Dial 1 (or 9) for an outside line.
- 2. Type the number you want to call using your keyboard's numeric pad.
- 3. Press the **Enter** key on your computer keyboard.
- 4. Click Release when you want to disconnect yourself from the call.

Tip! If you frequently call an particular external number, consider setting up the number as a Speed Dial button. For information on how to do this, see <u>Setting Up a Single DD Button</u>.

See Also

Basic Call Handling

Keyboard Call Handling

Answering an Incoming Call

Transferring an External Call

Joining two incoming calls

Answering Recalled Calls

Retrieving the Last Transferred Call

Retrieving any Transferred Call

Calling an Extension Directly

Answering a Ringing Extension

Toggling Between Two Callers

Intruding on a Call

To Place a Call on Hold

Taking a Call off Hold

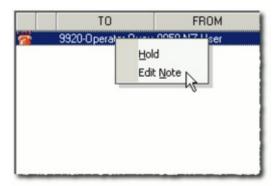
Adding a note to a call

An operator may add a short note to a call. Notes can be useful in reminding the operator of a caller's identity.

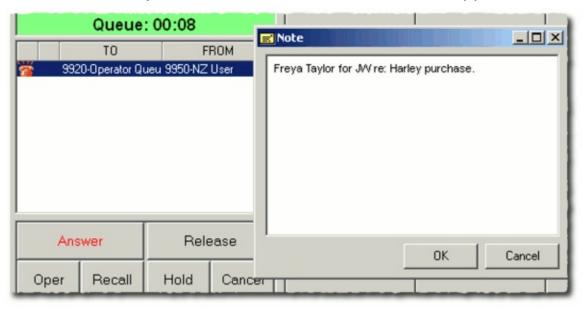
Note: This feature is turned OFF by default. To enable this feature, activate the Edit Call Notes check box in the <u>Console Configuration Settings</u>.

To add a note to a call:

- 1. Right-click on the call you wish to annotate.
- 2. Select **Edit Note** from the context menu:



3. Enter the text of your note into the Note window that appears:



4. Click OK.

Note: To read notes associated with a call, hover the mouse pointer over the call without clicking. The note text will appear in a tooltip.

Call Notes are not saved, nor are they transferred to other IPFX clients when the call leaves the Operator's Console.

See Also

Basic Call Handling

Keyboard Call Handling

Answering an Incoming Call

Transferring an External Call

Joining two incoming calls

Answering Recalled Calls

Retrieving the Last Transferred Call

Retrieving any Transferred Call

Calling an Extension Directly

Answering a Ringing Extension

Toggling Between Two Callers

Intruding on a Call

To Place a Call on Hold

Taking a Call off Hold

Calling an External Number Directly

Call Handling with Voicemail

Voicemail

The IPFX voicemail system allows users to decide how calls coming to their extension are handled.

Typically, when a call to an extension is not answered (after a number of rings, or because the extension is busy) the call will be forwarded to that extension's voicemail greeting.

A voicemail greeting usually invites callers to record a message. Some extensions may give callers other options for contacting the extension's owner, such as remaining on hold or transferring to a home or mobile number.

See Also

Call Handling with Voicemail

Transferring a Call to an extension with Voicemail

Transferring a Call Directly to a Voicemail Greeting

Recording a Message

Leaving a voicemail message as the operator

Accessing the After Hours/Operators Mailbox

Sending Enotes

Transferring a Call to an extension with Voicemail

If you know an extension owner is either on a call or not at their desk, you can still transfer the call rather than putting the caller on Hold or taking a message from them.

- 1. Inform the caller that if the person does not answer, they will be able to leave a message in their Voicemail.
- 2. Click on the appropriate DSS key Button.

See Also

Call Handling with Voicemail

Voicemail

Transferring a Call Directly to a Voicemail Greeting

Recording a Message

Leaving a voicemail message as the operator

Accessing the After Hours/Operators Mailbox

Transferring a Call Directly to a Voicemail Greeting

Under certain circumstances, you may wish to transfer a caller directly to an extension's voicemail greeting even if the extension is theoretically available to take the call.

- 1. With the caller on the line click on the **VMail** Button.
- 2. Click on the appropriate DSS key.

See Also

Call Handling with Voicemail

Voicemail

Transferring a Call to an extension with Voicemail

Recording a Message

Leaving a voicemail message as the operator

Accessing the After Hours/Operators Mailbox

Recording a Message

If a caller wants to leave a message with the Operator for a particular person, the Operator can record the message and have it delivered automatically:

- 1. Right click on the person's DSS key. The extension's Location screen will appear.
- 2. Click on the **Record** button (down the right hand side of the Location screen).
- 3. This will record the conversation between the Operator and the Caller.
- 4. Once finished the recording will automatically be delivered to the extension's mailbox.

See Also

Call Handling with Voicemail

Voicemail

Transferring a Call to an extension with Voicemail

Transferring a Call Directly to a Voicemail Greeting

Leaving a voicemail message as the operator

Accessing the After Hours/Operators Mailbox

Leaving a voicemail message as the operator

If you (as the operator) wish to leave voicemail for an extension, you can skip the extension's greeting and voicemail prompts and proceed directly to recording your message.

- 1. Click on the VM>> Button.
- 2. Click on the DSS key corresponding to the extension for whom which you wish leave a message. You will hear a short beep.
- 3. Begin speaking your message.
- 4. Hang up when you have spoken your message.

Note: This function should only be used when you as the operator wish to leave a message. Because no prompts are given, the function should not be used to allow callers to leave voicemail messages for extensions use the <u>Vmail button</u> or <u>Record button</u> for this purpose instead.

See Also

Call Handling with Voicemail

Voicemail

Transferring a Call to an extension with Voicemail

Transferring a Call Directly to a Voicemail Greeting

Recording a Message

Accessing the After Hours/Operators Mailbox

Accessing the After Hours/Operators Mailbox

If your company allows after hours callers to leave a message, their recording will be left in the Operator/After Hours Mailbox. If there are new voicemail messages, an envelope will appear in the Letterbox icon advising you of new mail. By Default the Mailbox number will be 0# unless specified. To access these messages:

On the IPFX Console:

- 1. Click on the Letterbox icon on the top tool bar.
- 2. Voicemail will now prompt you for a voicemail password, which you need to enter on the telephone.

OR:

Using your Phone:

1. Dial your company's voicemail Access Number.

(E.g. 51 then follow the instructions as given by voicemail).

Note If you have your own voicemail Box and you need to access the Operator Mailbox from your phone, dial your company's voicemail Access Number (eg: 51), then press the * key and enter the Operators extension number (eg: 0) and the # key. Now follow the instructions given by voicemail.

See Also

Call Handling with Voicemail

Voicemail

Transferring a Call to an extension with Voicemail

Transferring a Call Directly to a Voicemail Greeting

Recording a Message

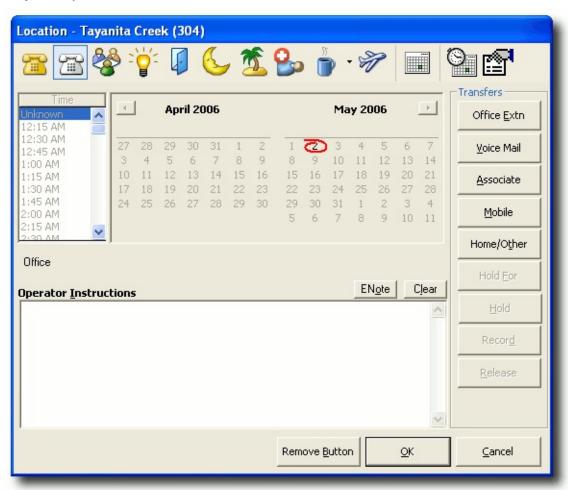
Leaving a voicemail message as the operator

Sending Enotes

You can easily send e-mail notes to an extension from that extension's Location screen.

To send an e-mail note ("Enote"):

1. Right-click on an extension in the Directory, or an extension's DSS key to open that extension's Location screen:



- 2. Click on the **Enote** button.
- 3. Enter your text into the Enote window that appears:



4. Click Email to send the message.

Note: The Enote function will only be available if Microsoft Outlook and CDO Components are installed on your computer.

See Also

Call Handling with Voicemail

Voicemail

Transferring a Call to an extension with Voicemail

Transferring a Call Directly to a Voicemail Greeting

Recording a Message

Leaving a voicemail message as the operator

Accessing the After Hours/Operators Mailbox

Advanced Call Handling

Toll Bar Override

If your company has specific Toll Barred extensions, the Operator can connect an extension to a variety of numbers that are considered 'Toll Calls'.

- 1. Click on the **Toll** button.
- 2. Ask the internal caller for the External Number.
- 3. Enter the required number using your keyboard (You don't need to enter 1 or 9 for an outside line).
- 4. Press the **Enter** Key on your keyboard.
- 5. When the line begins to ring, click on the **Release** Button.

See Also

Advanced Call Handling

Transferring a Caller to an External Number

Forcibly Terminating a Call

To Answer a Specific Call

Dialling a Pre-Programmed External Number

External Paging

Pause Call Delivery

Naming Page Tabs

Re-Dialling a Number

Operator Specific Notes

External Phone Directory

Re-Recording Break and Fire/Emergency Messages

Using Alarm Bells on the IPFX Console

Transferring a Caller to an External Number

Once you have answered the incoming call, and need to transfer offsite to an external number:

- 1. Tell the caller that you are transferring them now. (Ensure the **Release** Button is set to Manual).
- 2. Click on the Line Button (on the left hand side of your screen).
- 3. Dial the external number on your keyboard (you don't need to enter 1 or 9 for an outside line).
- 4. Press the **Enter** Key on your keyboard.
- 5. When the line beings to ring, click the **Release** Button.

See Also

Advanced Call Handling

Toll Bar Override

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Forcibly Terminating a Call

Note: Forcibly terminating a call requires Administrator-level privileges.

It may happen that a call gets "stuck" in the queue, even though no actual caller remains on the line. In this situation, an administrator can forcibly terminate the call.

To forcibly terminate a call:

- 1. Right-click on the call you wish to terminate.
- 2. Select **Kill** from the context menu:



3. The system will display a warning message:



4. Click **Yes** to terminate the call.

The call will be removed from the queue. If the call was associated with a live caller, the caller will be disconnected.

See Also

Advanced Call Handling

Toll Bar Override

Transferring a Caller to an External Number

To Answer a Specific Call

Dialling a Pre-Programmed External Number

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Using Alarm Bells on the IPFX Console

To Answer a Specific Call

You can choose the order in which you answer your calls.

If you simply click the **Answer** button, Console will deliver to you the longest waiting call. Other options are available:

To Answer a call specifically meant for the Operator

Click on the Oper Button.

The **Oper** button will answer the first Operator call that arrives at your IPFX Console

To Answer a Recall

• Click on the Recall Button.

The **Recall** button will allow you to answer a recalling call before any other calls. Recalls are displayed with a blue arrow in the incoming calls section.

To Answer a Busy recalled call

Click on the Busy Button.

The **Busy** button will allow you to answer a call that has returned to you from a busy extension, before any other calls. (This situation may occur if the extension does not have Voicemail).

To Answer a No Answer call

Click on the No Ans Button.

The **No Ans** button will allow you to answer a call that has returned to you from an extension that was not answered, before you answer any other calls. (This situation may occur if the extension does not have Voicemail). No Answer calls are shown with a Yellow arrow in the incoming calls section.

Note: Normal calls are displayed with a Black Arrow. These calls can be specifically answered by double clicking on the call in the Incoming Calls screen on your IPFX Console.

See Also

Advanced Call Handling

Toll Bar Override

Transferring a Caller to an External Number

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Using Alarm Bells on the IPFX Console

Dialling a Pre-Programmed External Number

Click on your selected DSS key.

(if already programmed as a Speed Dial)

OR:

- 1. Select the Open Book icon (a) in the Console toolbar.
- 2. Use either the Mouse or the Keyboard **áâ** arrows to select the required number.
- 3. Double-click to Dial the selected number.

See Also

Advanced Call Handling

Toll Bar Override

Transferring a Caller to an External Number

Forcibly Terminating a Call

To Answer a Specific Call

External Paging

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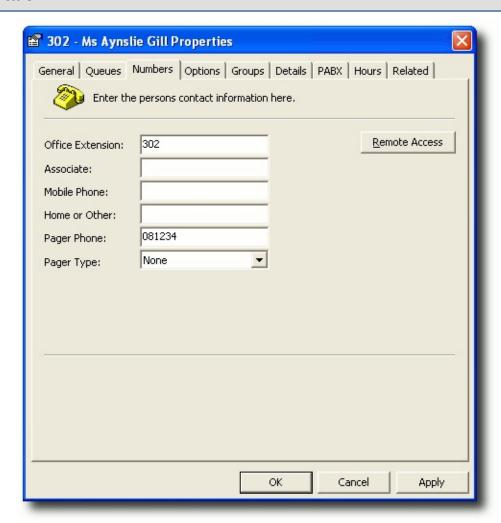
Re-Recording Break and Fire/Emergency Messages

Using Alarm Bells on the IPFX Console

External Paging

To enable external paging, the intended recipient must first have a pager number listed under their extension properties. Once you have opened the extension properties dialogue box on screen select the numbers tab to bring up the extension's list of numbers. The Pager Phone field is situated near the bottom of this list along with a drop down box for selection of the Pager Type. Enter the appropriate pager information in the field, select the pager type and click OK.

Note: It is imperative that the correct pager type is selected. If you are unsure of the user's pager type, contact the user to obtain the correct information.



Once you have set the user's pager number, right click on the user's DSS key to bring up their location screen. The pager button will now be active

if the pager number has been entered.

To send a pager message to the selected user, simply click on the pager button to bring up the Pager Text message box. Enter the message into the message field and click OK to send. The maximum character limit for the message is determined by the carrier service and not by IPFX. Contact the required carrier services to obtain the necessary information on the pager services they provide.

See Also

Advanced Call Handling

Toll Bar Override

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Using Alarm Bells on the IPFX Console

Pause Call Delivery

This function will delay the delivery of Operator calls by a default of 20 seconds.

To do this:

Click on the Pause Call Delivery icon on the top tool bar:



Note Calls will be visible on the IPFX Console but will not be delivered to your phone for 20 seconds.

See Also

Advanced Call Handling

Toll Bar Override

Transferring a Caller to an External Number

Forcibly Terminating a Call

To Answer a Specific Call

Dialling a Pre-Programmed External Number

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Using Alarm Bells on the IPFX Console

Naming Page Tabs

You have the ability to label any IPFX Console Telephony Group Shortcuts to suit your company's requirements. E.g.: For specific company groups such as Finance/Sales etc.

To name the tabs:

- 1. Left Click on the tab you want to set up, (a small box will appear).
- 2. Right Click on the label of tab you want to set up.
- 3. Type the tab description you want displayed (i.e. Finance, A-I etc)
- 4. Repeat as required.

Note: The Tab area will increase to accommodate the text length.

See Also

Advanced Call Handling

Toll Bar Override

Transferring a Caller to an External Number

Forcibly Terminating a Call

To Answer a Specific Call

Dialling a Pre-Programmed External Number

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Re-Recording Break and Fire/Emergency Messages

Using Alarm Bells on the IPFX Console

Re-Dialling a Number

If you have been unsuccessful in reaching an external number and you want to try again, rather than re- entering the number, you can use the Redial Bar.

- 1. Click on the **Redial** drop-down box on the top tool bar.
- 2. Use either the Mouse or the Keyboard áâ arrows to select the required number.
- 3. Press **Enter** on your keyboard (to call that number).

See Also

Advanced Call Handling

Toll Bar Override

Transferring a Caller to an External Number

Forcibly Terminating a Call

To Answer a Specific Call

Dialling a Pre-Programmed External Number

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Using Alarm Bells on the IPFX Console

Operator Specific Notes

By clicking on the Page and Paper Clip icon (p) on the top tool bar, you will be able to leave special notes for yourself or any other person who may work at your IPFX Console from time to time.

Note: This is useful in a Job Share situation or when a Temp is in for the day.

See Also

Advanced Call Handling

Toll Bar Override

Transferring a Caller to an External Number

Forcibly Terminating a Call

To Answer a Specific Call

Dialling a Pre-Programmed External Number

External Paging

Pause Call Delivery

Naming Page Tabs

Re-Dialling a Number

External Phone Directory

Re-Recording Break and Fire/Emergency Messages

Using Alarm Bells on the IPFX Console

External Phone Directory

Clicking on the Open Book icon (a) on the top tool bar, will display the External Company Contacts. You can sort by clicking on each tab.

Dial a contact by pressing enter on your keyboard or double clicking on the contact.

See Also

Advanced Call Handling

Toll Bar Override

Transferring a Caller to an External Number

Forcibly Terminating a Call

To Answer a Specific Call

Dialling a Pre-Programmed External Number

External Paging

Pause Call Delivery

Naming Page Tabs

Re-Dialling a Number

Operator Specific Notes

Re-Recording Break and Fire/Emergency Messages

Using Alarm Bells on the IPFX Console

Re-Recording Break and Fire/Emergency Messages

To re-record the Break or Fire/Emergency messages

- 1. Click on the Microphone icon (s) on the top tool bar.
- 2. Select the Message type you want to record.
- 3. Click on **OK**. (The Voicemail system will now ring you).
- 4. Select **1** to Listen or **2** to Record.(Now follow the instructions as given by Voicemail).

Note: You will be required to Press the # key to confirm your recording. Use the # key on your phone, DO NOT use Shift 3 on your keyboard. If you wish to re-record Operator Queue announcements, please discuss with your IT Administrator.

See Also

Advanced Call Handling

Toll Bar Override

Transferring a Caller to an External Number

Forcibly Terminating a Call

To Answer a Specific Call

Dialling a Pre-Programmed External Number

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Using Alarm Bells on the IPFX Console

Using Alarm Bells on the IPFX Console

Alarm Bells alert you when there are calls queuing on the IPFX Console.

To turn Alarm Bells On:

- 1. Click the Bell Icon (4) on the top tool bar.
- 2. Select **Yes** to turn Alarm bells On.

To turn Alarm Bells Off:

- 1. 1. Click the Bell Icon (4) on the top tool bar.
- 2. 2. Select **No** to turn Alarm bells Off.

Note: This function requires a sound card on your PC, it uses the 'Defaul Beep' sound event which will need to be configured with a desired sound

See Also

Advanced Call Handling

Toll Bar Override

Transferring a Caller to an External Number

Forcibly Terminating a Call

To Answer a Specific Call

Dialling a Pre-Programmed External Number

External Paging

Pause Call Delivery

Naming Page Tabs

Re-Dialling a Number

Operator Specific Notes

External Phone Directory

Re-Recording Break and Fire/Emergency Messages

Conference calls in Console

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.

To Conference a new party into an existing conversation

- While speaking with your first party, click the Conf button.
- Call your second party by either:
 - Typing the second party's phone number or extension on your keyboard and pressing Enter, or
 - Clicking on the second party's DSS key, or
 - Double-clicking on the second party's name in the Directory.
- When the second party answers, you may wish to verbally invite them to the conference. While you speak with the second party, the first party will hear Music on Hold, or silence, depending on the PBX.
- To connect all three parties in a conference, click Conf.

Advanced Call Handling Toll Bar Override Transferring a Caller to an External Number Forcibly Terminating a Call To Answer a Specific Call Dialling a Pre-Programmed External Number External Paging Pause Call Delivery

In This Section

Setting up a Meetme Conference Naming Page Tabs

Re-Dialling a Number

Operator Specific Notes

External Phone Directory

Re-Recording Break and Fire/Emergency Messages

Using Alarm Bells on the IPFX Console

Setting up a Meetme Conference



PBX Dependent Feature!

Note You must have the <u>Enable Directory Context Menu</u> setting turned on in order to perform this procedure.

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

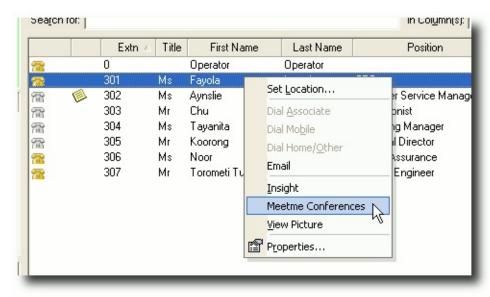
- Call users to Conference them in at the date/time specified, or
- Allow users to call into the Conference with a password.

To Set up a Conference

1. Select one of the Directory buttons from the main toolbar:

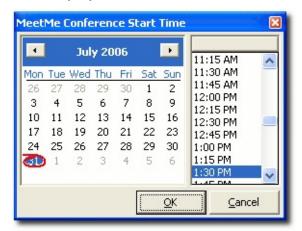


- 2. Right click on any extension.
- 3. Click Meetme Conferences:

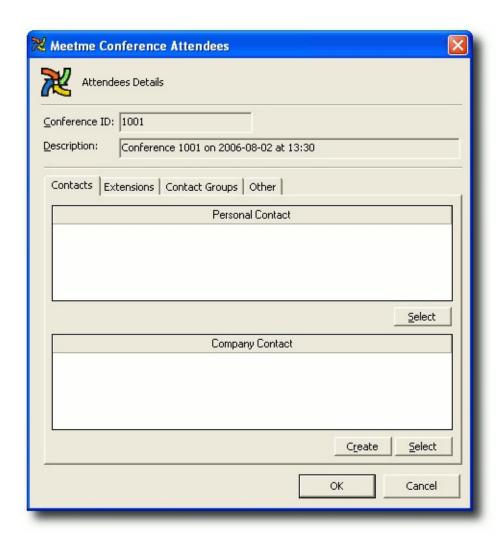


4. Click Add to add a Conference setting.

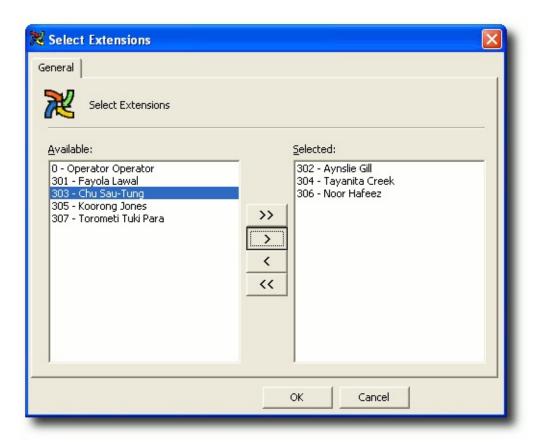
5. Select the date and time you would like your Conference time from the Popup calendar:



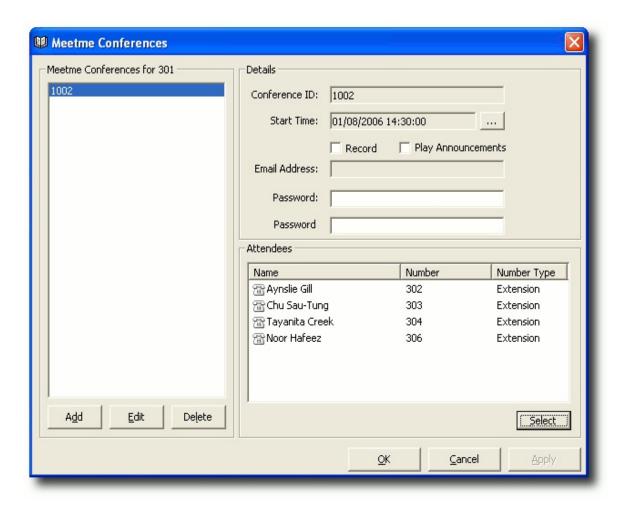
- 6. A new Meet Me Conference ID will appear in the left window pane.
- 7. Click the **Select** button to add attendees.
- 8. Click **Create** to create a new contact as an Attendee, or click **Select** to choose from your existing Personal or Company Contacts.



- 9. To invite an existing Contact, Extension, or Contact Group:
 - Click on the relevant tab (Contact, Extensions or Contact Groups)
 - 2. Click the **Select** button.
 - 3. Highlight the name(s) of the Attendees and click the > arrow to select them:



- 4. When all Attendees selected, click **OK**.
- 10. To invite an arbitrary phone number to the conference:
 - 1. Click on the Other tab.
 - 2. Click Add.
 - 3. Double click in the blank line that appears and enter the phone number of the person whom you wish to invite.
 - 4. Click OK.
- 11. Click OK.
- 12. Attendees are listed, as shown on the screen below.



- 13. To record the conference (optional):
 - 1. Select the **Record** checkbox
 - 2. Enter an email address to where the recording will be sent.
- 14. If you wish to protect the conference from unauthorised attendees, enter a password for the conference. You must inform attendees of this password in order for them to be able to join the conference.
- 15. Click OK.

To Dial into a Meetme Conference

Attendees may join the conference in the following manner:

- 1. The Conference server will automatically call each attendee at the scheduled date and time.
- 2. When the Conference server calls, you will be asked to enter the Conference ID followed by the # key.

- 3. You may also be asked for the Conference password. If so, enter the password followed by the # key.
- 4. In order for the Conference server to announce you to the other parties, you will be asked to record your name. When prompted, speak your name then press the # key.

Note: If you do not enter the Conference ID within 5 seconds, the Conference server will hang up this is a precaution to ensure that the Conference server does not connect to voicemail.

If the Conference server hangs up, you may join the conference by dialling the dedicated extension or DDI for the Meetme Conference Server (your Administrator can advise you of this number).

Note that you can only dial into an active Meetme Conference at the specified date and times of the conference.

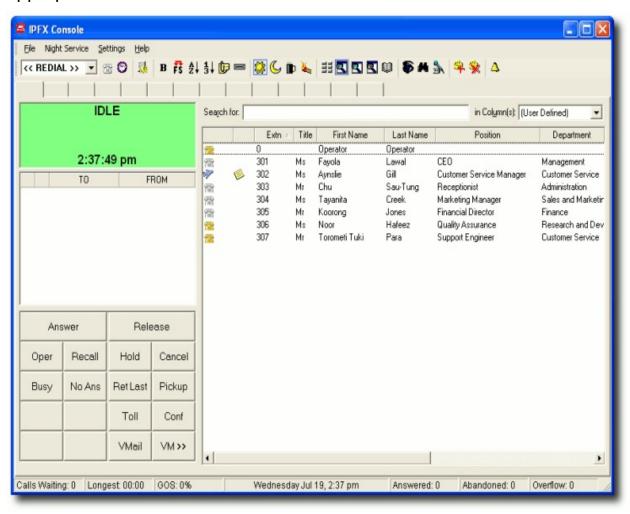
To view Meetme Conference details, right click on an Attendee's extension in the Directory and select **Meetme Conferences**. Meetme Conferences are deleted after the specified date and time.

See Also

Using the Directory

The Directory lists all the internal extensions which you can call, or to which other calls can be transferred. The location or call status of each extension is shown by the icon next to their the extension's name.

You can also set a user's location from this screen by right clicking on the appropriate name.



You are able to sort within this directory based on your requirements.

Searching within Company Directory

Open the Directory by clicking any one of the magnifying glasses on the IPFX Phone Control Toolbar:



- Click the first magnifying glass (the one with a red "E") to open the directory, sorted by Extension Number.
- Click the second magnifying glass (the one with a red "F") to open the directory, sorted by First Name.
- Click the third magnifying glass (the one with a red "S") to open the directory, sorted by Surname.

See Also

Using the Directory

Sorting the Directory

Searching the Directory within a Single Field

Searching the Directory: Quick Search over Multiple Fields

Dialling from the Directory

Send e-mail to an extension

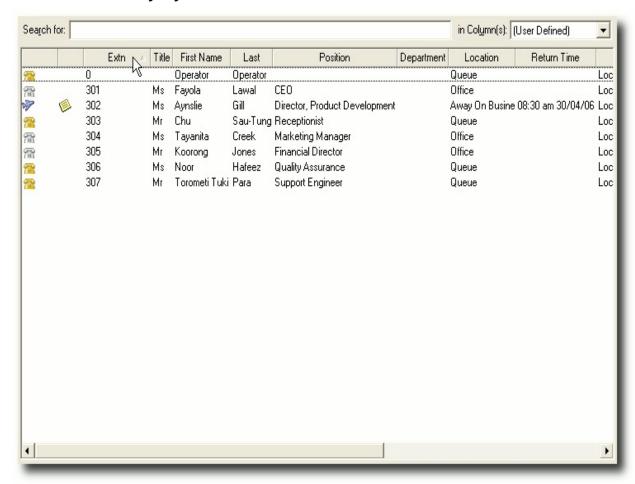
Changing an extension's properties

Open chat window to an extension

Filtering the Directory

Sorting the Directory

Click on the tabs at the top of the directory to sort by field. For example to sort the Directory by extension number, click on the Extn tab.



See Also

Using the Directory

Searching within Company Directory

Searching the Directory within a Single Field

Searching the Directory: Quick Search over Multiple Fields

Dialling from the Directory

Send e-mail to an extension

Changing an extension's properties

Open chat window to an extension

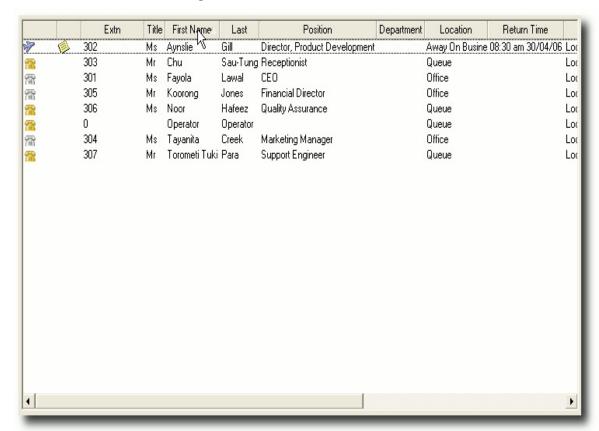
Filtering the Directory

Searching the Directory within a Single Field

In a large Directory, it may take some time to locate a specific extension. IPFX Console allows you to quickly jump to any desired point in the directory without having to use the scroll bars.

To search within a single field:

 Click on the column heading that corresponds to the field you want to search. For example, to search by first name, click on the First Name column heading:



- 2. Using your keyboard, press the first letter or number of the entry that you are looking for. For example, to locate Aynslie Gill's extension in a First Name search you would press "A". To locate the same extension in the Last Name search, you would press "G".
- 3. The IPFX Console will scroll down to the first extension that matches your search.
- 4. In the case of multiple matches, use the arrow keys on your

keyboard to move among the matching extensions.

See Also

Using the Directory

Searching within Company Directory

Sorting the Directory

Searching the Directory: Quick Search over Multiple Fields

Dialling from the Directory

Send e-mail to an extension

Changing an extension's properties

Open chat window to an extension

Filtering the Directory

Searching the Directory: Quick Search over Multiple Fields

In This Section

What is the Quick Search Feature?

Simple Search

Advanced Search

<u>User Defined Search</u> Columns

Search criteria field

See Also

Using the Directory

Searching within Company Directory

Sorting the Directory

Searching the Directory within a Single Field

Dialling from the Directory

Send e-mail to an extension

Changing an extension's properties

Open chat window to an extension

Filtering the Directory

What is the Quick Search Feature?

The Quick Search feature facility enables the operator to search across multiple columns using the search criteria to display all matches.

Below is a list of modifications which have been made to IPFX Console to facilitate the Quick Search.

- Single textbox to be used to enter search criteria
- Display only the rows matching the search criteria
- Ability to search on a single or multiple columns

In This Section

Row Matching

See Also

Searching the Directory:
Quick Search over Multiple
Fields

Simple Search

Advanced Search

User Defined Search

Columns

Search criteria field

Row Matching

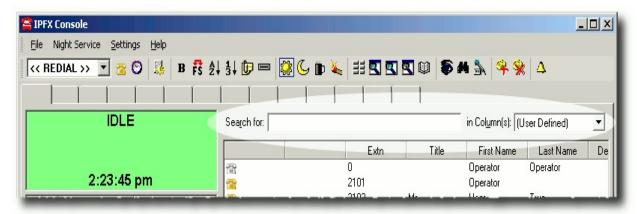
A matching row is deemed to be a row which has a column value which starts with the search criteria. This is not case sensitive.

See Also

What is the Quick Search Feature?

Simple Search

Enter your search criteria into the **Search for** box at the top of the extension directory:



As each key is pressed the rows displayed will update to only show rows matching the search criteria.

Use the drop down list to the right of the search box to tell Console which directory columns to match against your search criteria: First Name, Last Name, Extension etc.

Select the **All** option from the drop-down list to match your criteria against all directory columns.

Select the **User Defined** option to match against <u>multiple columns</u>.

Clearing the search box on a new call

When you answer a call, you can begin typing in the **Search for** box immediately - you do not need to click in the box first.

You may decide what happens to an existing search when a new call comes in.

- 1. Click on the Configuration Icon () on the top tool bar.
- 2. Go to the Quick Search tab
- 3. Select a behaviour from the On a new call drop-down menu:



- Do Nothing: Your existing search text will remain in the Search for box.
- **Highlight Search Text**: Your existing search text will remain in the **Search for** box, but will be highlighted. You can begin typing to over-write the text.
- Clear Search Text: Your existing search text will be erased from the Search for box.

See Also

Searching the Directory: Quick Search over Multiple Fields

What is the Quick Search Feature?

Advanced Search

User Defined Search Columns

Search criteria field

Advanced Search

The advanced search accepts a query syntax which is entered into the search criteria itself. So you can specify which columns to search and for what criteria. Using the Advanced search query will override the column(s) which has been selected to search on.

The syntax of is this is field=value. Each field/value pair is separated by a semicolon.

Below are some examples of an Advanced Search.

Search for anyone whose first name starts with J and Surname starts with M

FN=J;SN=M

Search for anyone in the accounts department

D=Account

Search for a Technician in Sydney

Pos=Tech;Reg=Syd

See Also

Searching the Directory: Quick Search over Multiple Fields

What is the Quick Search Feature?

Simple Search

User Defined Search Columns

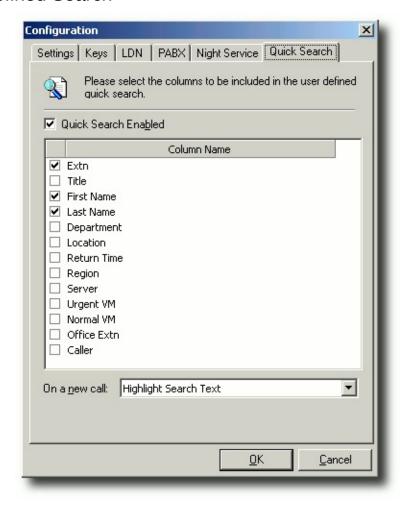
Search criteria field

User Defined Search Columns

In some situations, searching a single column may not be adequate. Likewise, searching all columns may not return the results we require either.

An operator can setup a User Defined search which can include all the common columns that require searching.

- 1. Click on the Configuration Icon () on the top tool bar.
- 2. Go to the Quick Search tab
- 3. Click in the tick boxes all the columns you wish to be included in the User Defined Search



See Also

Searching the Directory: Quick Search over Multiple Fields

What is the Quick Search Feature?

Simple Search

Advanced Search

Search criteria field

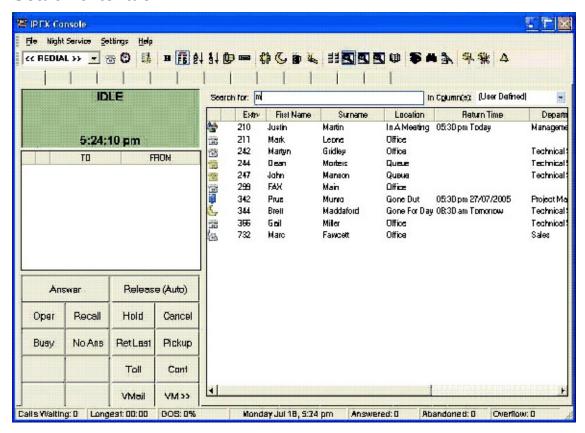
Search criteria field

As data is entered into the search criteria, the extension directory will only display rows matching what has been entered. To go back to viewing the entire extension directory, the search criteria will need to be deleted.

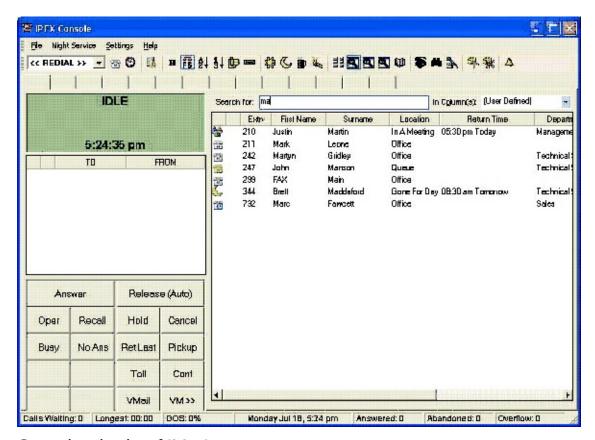
The images below show the results of searching for 'Mar' using the user defined columns of **Extn**, **First Name** and **Surname**.

You can see which rows are displayed as each key is pressed.

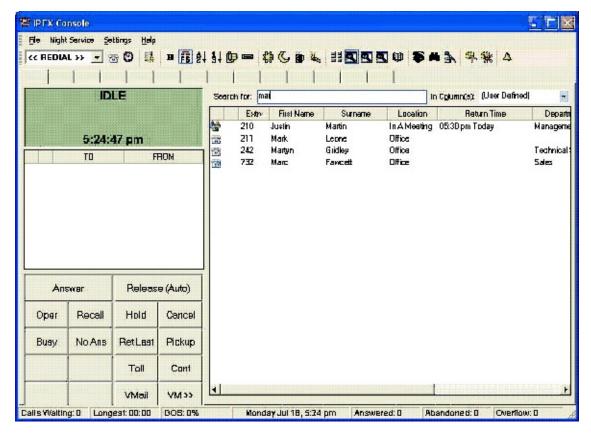
Search criteria of 'M':



Search criteria of 'Ma':



Search criteria of 'Mar':



See Also

Searching the Directory:
Quick Search over Multiple
Fields

What is the Quick Search Feature?

Simple Search

Advanced Search

<u>User Defined Search</u> <u>Columns</u>

In This Section

Shortcut Keys

Shortcut Keys

ESC: Clears the current search criteria and display all rows.

Down Arrow (â): If no row is currently selected, the first row will be selected. If a row is selected, this will move down one row.

Up Arrow (á): If no row is currently selected, the last row will be selected. If a row is selected, this will move up one row.

See Also

Search criteria field

Dialling from the Directory

To dial an extension from the Directory, first ensure you are on the correct extension, then either:

 Press enter on your keyboard and you will be connected with the extension

OR:

 Double click on the highlighted extension with your mouse and you will be connected to that extension.

See Also

Using the Directory

Searching within Company Directory

Sorting the Directory

Searching the Directory within a Single Field

Searching the Directory: Quick Search over Multiple Fields

Send e-mail to an extension

Changing an extension's properties

Open chat window to an extension

Filtering the Directory

Send e-mail to an extension

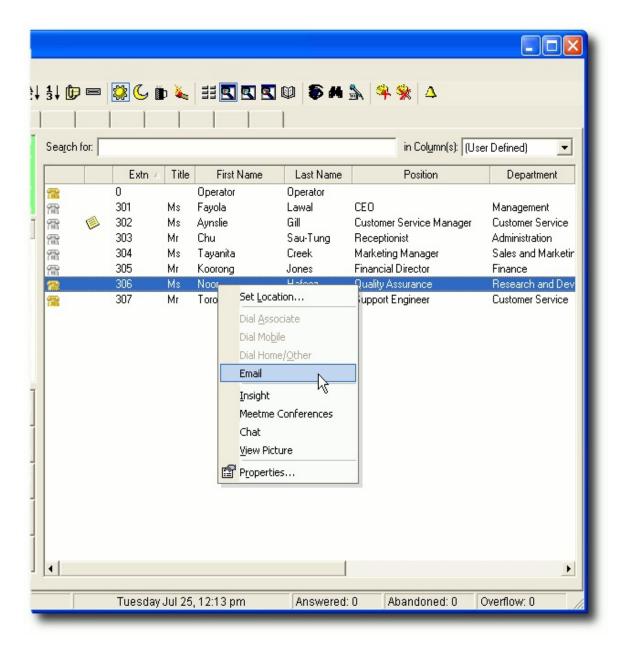
Note: For this function to work the selected extension must have an email address associated to it, and the **Enable Directory Context Menu** option must be turned on in Console's <u>Configuration > Settings Tab</u>.

How to send an E-mail message from the Directory

1. Click on one of the the Directory buttons on the toolbar:



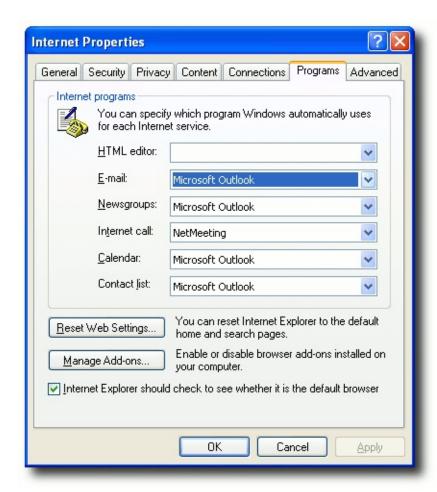
- 2. The Directory will appear.
- 3. Right click on the extension two whom you wish to send an e-mail message to display the context menu:



- 4. Select Email.
- 5. Your default e-mail client will open for you to type in and send your message.

If your default e-mail client does not display, check the following

- 1. Open Start>Control Panel>Internet Options
- 2. The Internet Options Screen appears.
- 3. Click on the Programs tab:



- 4. Select your e-mail client from the drop-down menu.
- 5. Click OK.

See Also

Using the Directory

Searching within Company Directory

Sorting the Directory

Searching the Directory within a Single Field

Searching the Directory: Quick Search over Multiple Fields

Dialling from the Directory

Changing an extension's properties

Open chat window to an extension

Filtering the Directory

Changing an extension's properties

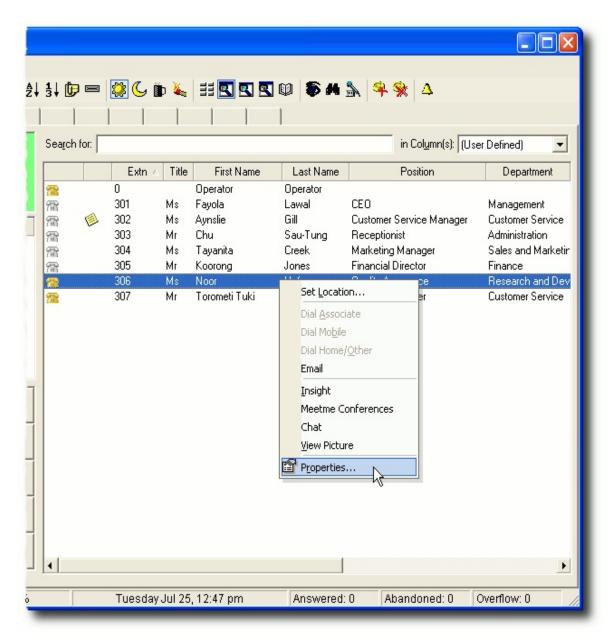
Note: For this function to work the **Enable Directory Context Menu** option must be turned on in Console's <u>Configuration > Settings Tab</u>. Additionally, unless you have Administrator privileges you will only be able to change your own extension's properties.

To change an extension's properties:

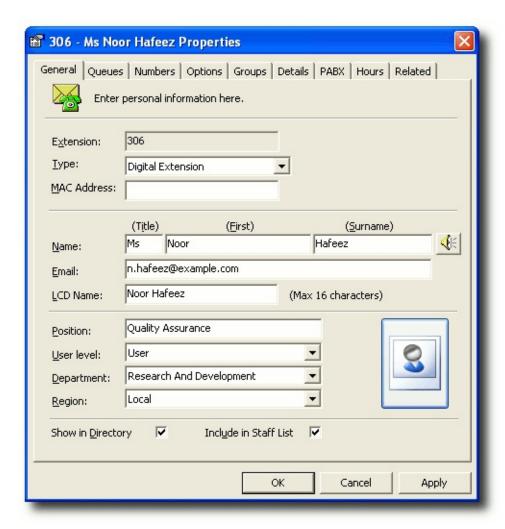
1. Click on one of the the Directory buttons on the toolbar:



- 2. The Directory will appear.
- 3. Right-click on the extension whose properties you wish to change. The context menu will appear:



- 4. Select Properties.
- 5. The selected extension's Properties screen will appear:



- 6. Enter or alter details as required.
- 7. 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

Using the Directory

Searching within Company Directory

Sorting the Directory

Searching the Directory within a Single Field

Searching the Directory: Quick Search over Multiple Fields

Dialling from the Directory

Send e-mail to an extension

Open chat window to an extension

Filtering the Directory

Open chat window to an extension

Chat enables you to chat online with another internal user.

To Chat online

- 1. Click into your Directory from the Main Toolbar.
- 2. Right click on the user you wish to chat with in the Directory listing
- 3. Click Chat.
- The screen below displays.
 Type your chat conversation into the bottom section.
- Click Send.
- 6. An 'Alert' notification will populate the screen of the user you sent your chat to as follows:
- 7. When the user in question replies, you will receive a text reply within your screen as follows:
- 8. You can continue the chat conversation by entering information and clicking the **Send** key.

See Also

Using the Directory

Searching within Company Directory

Sorting the Directory

Searching the Directory within a Single Field

Searching the Directory: Quick Search over Multiple Fields

Dialling from the Directory

Send e-mail to an extension

Changing an extension's properties

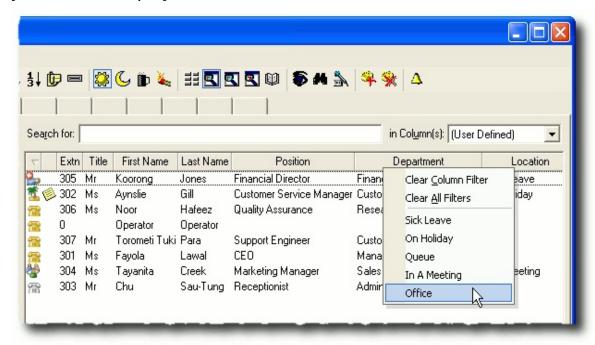
Filtering the Directory

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

Using the Directory

Searching within Company Directory

Sorting the Directory

Searching the Directory within a Single Field

Searching the Directory: Quick Search over Multiple Fields

Dialling from the Directory

Send e-mail to an extension

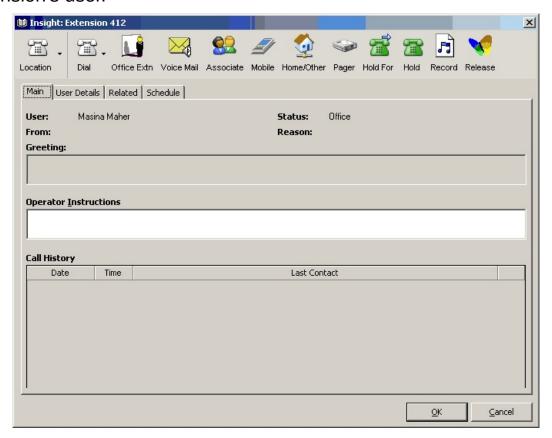
Changing an extension's properties

Open chat window to an extension

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.



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.

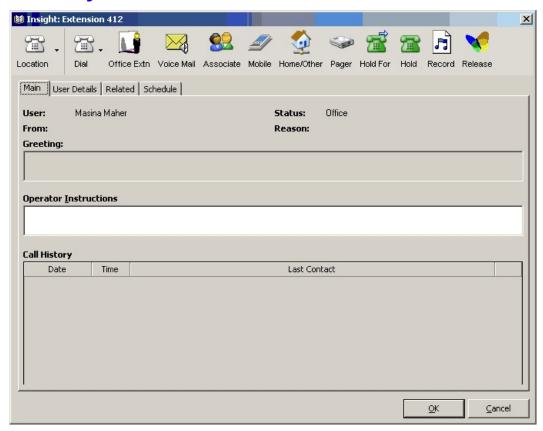
Note Email, Chat and LCD messaging are only available on the IPFX for NEC platform.

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:



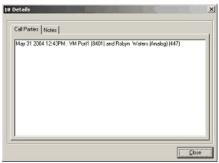
Note Above is an example of the IPFX Insight screen.

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 will display the details screen as shown below.

Call History



This is only visible when on a live call.

See Also

<u>Insight - Viewing Extension</u> <u>Details and Appointments</u>

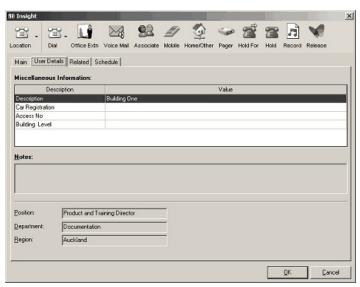
Viewing User Tab of Insight

<u>Viewing Related Tab of Insight</u>

<u>Viewing Schedule Tab of Insight</u>

Viewing User Tab of Insight

Functionality within the User Tab



This Feature

Does This

Miscellaneous Information

Shows miscellaneous information from the Details tab of the user's Properties screen.

Notes Sho

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

<u>Viewing Related Tab of</u> <u>Insight</u>

Viewing Schedule Tab of

Insight

Viewing Related Tab of Insight

Functionality within the Related Tab

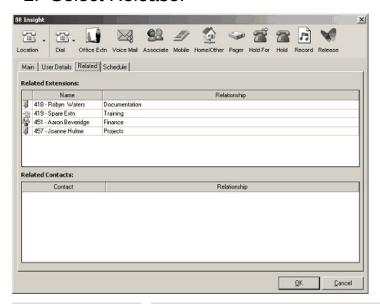
This shows any Internal and/or External Relationships the User has put in place, eg: who the user specifies as the Technical Advisor, Administration Contact, Secretary, Accountant, etc.

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.



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

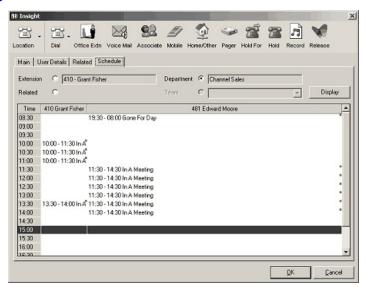
<u>Viewing Main Tab of</u> <u>Insight</u>

Viewing User Tab of Insight

<u>Viewing Schedule Tab of Insight</u>

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

Details and Appointments

Viewing Main Tab of

<u>Insight</u>

Viewing User Tab of Insight

Viewing Related Tab of

Insight

Programming Functions

Customising the Screen Layout

Tab Pages and individual DD Buttons can be set up to suit your company's requirements. Each Tab page has 48 individual programmable DD Buttons. (Based on screen resolution).

See Also

Programming Functions

Customizing the Number of Page Tabs

Setting Up a Single DD Button

Adding Multiple Extensions to DD Tab Pages

Removing a Single DD Button

Function Shortcut Keys

Creating Mailboxes

Deleting Mailboxes

Customizing the Number of Page Tabs

You can custodies the number of Page Tabs available on the IPFX Console screen. The default setting is 14 Tabs.

To add additional Tabs:

- 1. Click the Configuration icon on the top tool bar.
- 2. Ensure you are in the Settings Tab
- 3. Enter the number of Tab pages you want next to 'Extension Tab Count'.

See Also

Programming Functions

Customising the Screen Layout

Setting Up a Single DD Button

Adding Multiple Extensions to DD Tab Pages

Removing a Single DD Button

Function Shortcut Keys

Creating Mailboxes

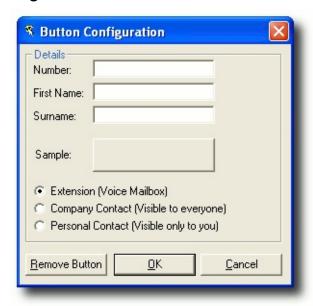
Deleting Mailboxes

Setting Up a Single DD Button

The Direct Dial buttons can be set up to suit your companies' requirements. e.g.: Company extension numbers only or a mixture of Company extension numbers and frequently called External numbers etc.

To add a Internal Extension DD Button

1. Right Click on a blank DD Button.



- 2. Enter the Extension Number you want displayed.
- 3. The name should automatically appear.
- 4. Ensure the correct button type has been selected. i.e. Extension (Voice Mailbox).
- 5. Click OK.
- 6. Repeat as required.

To add a External Number DD Button

- 1. Right click on a blank DD Button.
- 2. Enter the number you want to be able to dial (you do not need to enter 1 or 9 for an outside line).
- 3. Enter the persons name/description.
- 4. Choose whether the contact should be a Company Contact (visible

to everyone) or a Personal Contact (visible only to you).

Note: Company contacts can only be created by an Administrator.

- 5. Click OK.
- 6. Repeat as required.

See Also

Programming Functions

Customising the Screen Layout

<u>Customizing the Number of Page Tabs</u>

Adding Multiple Extensions to DD Tab Pages

Removing a Single DD Button

Function Shortcut Keys

Creating Mailboxes

Deleting Mailboxes

Adding Multiple Extensions to DD Tab Pages

From within the Company Directory, you can add extensions to your Tab Page.

How to add Extension(s) to a DD Tab Page

- 1. Click on the Magnifying Glass icon (Search Company Directory).
- 2. Click on the desired extension number.
- 3. Drag the extension to the appropriate DD Tab.
- 4. Release the mouse button.

To select more than one (1) extension

1. Hold down the **CTRL** key while you click each extension. Keeping holding down the **CTRL** key while you drag the group of extensions to the appropriate DD Tab.

OR:

Select a consecutive range of extensions by clicking on the first extension, holding down the **SHIFT** key, clicking the last extension, then dragging the group of extensions to the appropriate DD Tab.

See Also

Programming Functions

Customising the Screen Layout

<u>Customizing the Number of Page Tabs</u>

Setting Up a Single DD Button

Removing a Single DD Button

Function Shortcut Keys

Creating Mailboxes

Deleting Mailboxes

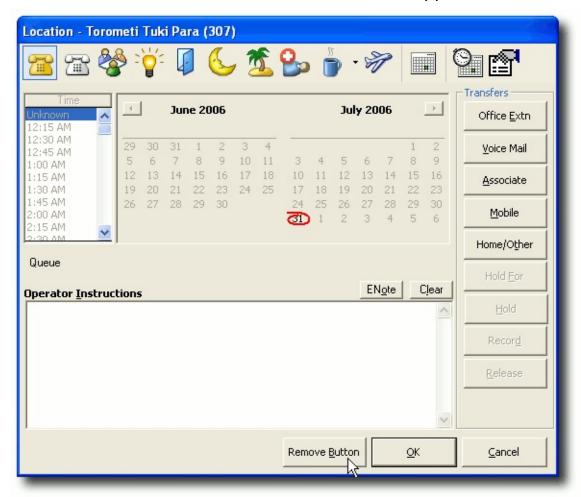
Removing a Single DD Button

Method 1

- 1. Click and hold down the left mouse button over the DD button that you wish to remove.
- 2. Drag the DD button to the empty area of the toolbar to the right of the DD Tabs.
- 3. Release the mouse button.

Method 2:

- 1. Right Click on the DD Button you want to remove.
- 2. The Location screen for the selected extension appears:



3. Click on the **Remove** Button.

See Also

Programming Functions

Customising the Screen Layout

<u>Customizing the Number of Page Tabs</u>

Setting Up a Single DD Button

Adding Multiple Extensions to DD Tab Pages

Function Shortcut Keys

Creating Mailboxes

Deleting Mailboxes

Function Shortcut Keys

Your keyboard's Function keys can be personalized to act as Basic Call handling short cut keys.

For example, **F2** could be programmed to answer an incoming call, **F3** could be programmed to Hold a call and so on.

Note: The **F1** and **F10** keys are not available for use as Console shortcut keys.

In This Section

Function Key Responses:

<u>Programming The Function</u> <u>Keys</u>

See Also

Programming Functions

Customising the Screen

Layout

Customizing the Number of

Page Tabs

Setting Up a Single DD

Button

Adding Multiple Extensions

to DD Tab Pages

Removing a Single DD

<u>Button</u>

Creating Mailboxes

Deleting Mailboxes

Function Key Responses:

Function keys may be programmed with any of the following functions:

- Answer: Answers an incoming call.
- Busy: Answers calls which have been forwarded to operators from a busy extension.
- Cancel: Cancels a call being dialed from the keyboard.
- **Conference:** Sets up a conference call between several parties.
- Dial Previous: Re-dials the last number dialed.
- Hold: Places a call on hold.
- Hold For: Places a call on hold and marks the call for a particular extension. When the extension becomes available, the call is delivered automatically.
- **Hold Announcement:** Places a call on Hold and marks the call for a particular extension. The call remains on hold until recalled by the operator.
- Join: Joins two calls together.
- LDN 1 to 8: Answers a Line Display Number
- **No Answer:** Answers calls which have been forwarded to operators from a non-answering extension.
- Operator: Answers calls which have been dialled directly to the operator number: '0' in New Zealand, '9' in Australia.
- Park: Places a call on a park, from where it can be retrieved from another extension.
- Pick up: Answers a call ringing on another extension.
- Release: Releases a transferred call.
- Release Auto/Manual): Toggles between Automatic and Manual release mode.
- Retrieve Last: Retrieves a transferred call, provided the call has not been answered.
- Search DSS: Displays the console DSS keys; the equivalent of clicking the View DSS Keys button in the toolbar.
- Search Extn: Displays the internal directory, sorted by extension number; the equivalent of clicking on the Search Extension

Directory by Extension button in the toolbar.

- **Search External:** Displays the company directory; the equivalent of clicking on the **Search Company Directory** button in the toolbar.
- Search FN: Displays the internal directory, sorted by first name; the equivalent of clicking on the Search Extension Directory by First Name button in the toolbar.
- Search SN: Displays the internal directory, sorted by surname; the equivalent of clicking on the Search Extension Directory by Surname button in the toolbar.
- Src/Dest: Toggles between two callers. PBX Dependent Feature!
- **Toll Override:** Allows the operator to connect an extensions to a toll-barred number.
- Transfer: Transfers a call to another extension.

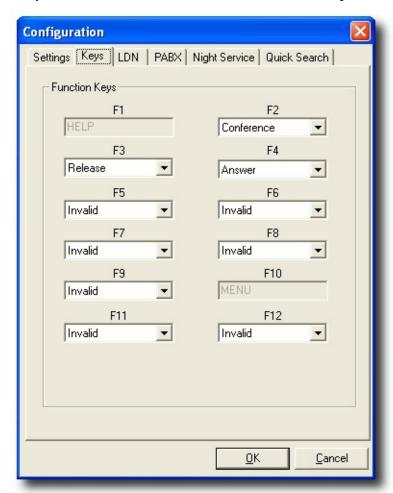
See Also

Function Shortcut Keys

Programming The Function Keys

Programming The Function Keys

- 1. Click the Configuration Icon (Cog/Gear) on the top tool bar.
- 2. Go to the Keys Tab.
- 3. Select the Function key you want to program e.g. F2
- 4. Select the Response you want programmed for that key using the drop-down box. e.g. Answer.
- 5. Click OK.
- 6. Repeat for each individual Function Key as necessary.



See Also

Function Shortcut Keys

Function Key Responses:

Creating Mailboxes

Note: This is a IPFX Console Administrator User Level Feature

To create a new Mailbox with Voicemail

 Click on the Telephone with + Symbol icon (Create Extension/Voicemail mailbox) on the top tool bar. The Create New Mailbox screen appears:



- Enter the new extension number.
- 3. Enter the name of the staff member to whom the new extension belongs.
- 4. Ensure that the **Extension (Voicemail Mailbox)** option is selected.
- 5. Click OK.

See Also

Programming Functions

Customising the Screen Layout

Customizing the Number of Page Tabs

Setting Up a Single DD Button

Adding Multiple Extensions to DD Tab Pages

Removing a Single DD Button

Function Shortcut Keys Deleting Mailboxes

Deleting Mailboxes

Note: This is a IPFX Console Administrator User Level Feature

To delete a Mailbox that is no longer required within Voicemail

- 1. Click on the Telephone with the X Symbol icon (Delete Extension/Voicemail mailbox) on your top tool bar.
- 2. Enter the Extension number you want to Delete.
- 3. Click OK.
- 4. Click **Yes** to confirm you want this Extension Deleted.

See Also

Programming Functions

Customising the Screen Layout

Customizing the Number of Page Tabs

Setting Up a Single DD Button

Adding Multiple Extensions to DD Tab Pages

Removing a Single DD Button

Function Shortcut Keys

Creating Mailboxes

Configuration Settings

To change the settings configured for your IPFX Console, click into the Options icon on the IPFX Phone Control Toolbar.

Options and Settings

	See Also
	Configuration Settings
In This Section	Keys Tab
Auto Action Controls	LDN Tab
<u>Settings</u>	PABX Tab
	Night Service Tab
	Quick Search Tab

Auto Action Controls

Should you want the IPFX Console to popup when the phone rings, you will need to enable the Auto Action Controls.

This Feature Does This

Ring Activate

Click this option if you want the IPFX Console to appear and hide for each call. The slide bar timer will determine the amount of seconds a call will ring for before activating the screen.

Queue Activate

If the IPFX Console is minimized and the Operator is on another call there is no way for the Operator to know when another call has come into the Queue. Click this option if you want the IPFX Console screen to 'Popup' when a queue call is received. The slide bar timer will determine the amount of seconds a call will ring for before activating the screen.

Stay Active

Click this option if you want the IPFX Console to stay active permanently. This means the operator will physically need to minimize the IPFX Console screen, should it be necessary.

See Also

Options and Settings
Settings

Settings

Should you want the IPFX Console to 'Popup' when the phone rings, you will need to enable the Auto Action Controls.

This Feature	Does This
Pop Locations	By selecting Pop Locations, when a caller presses 0 from a Voicemail mailbox for the Operator, the Location of the user from whom the caller has been diverted will automatically populate the screen.
Lock DSS Keys	This enables you to lock the DSS keys on the IPFX Console so that they cannot be moved around.
Bar Auto Release	If this is selected, this stops the Operator from right clicking on the Auto Release button to do either Manual or Auto Releases. Eg: If a Company requires all calls to be announced first, you may wish to lock the Bar on Release to enforce this rule.
Show Time in 24hr Format	This shows the time format in either 12 or 24 hour clock.
Information Console Mode	By selecting this feature, you put the IPFX Console into Information Mode, showing only the DSS keys with no answering or call controls. This is normally used where people only wish to view users extension numbers.
Use LDN Scripting	LDN Scripting allows you to enter a script of how to answer calls, so whenever a call comes into the system, the appropriate script will populate the screen so that the Operator can use this for answering all calls.
Pop Insight	If you select Pop Insight instead of Pop Locations, this will populate IPFX Insight with related contacts - for further information see Viewing a User's Appointments from Insight.
	Insight is a purchasable module; check with your Administrator whether this feature is available on your system.
Beep on Call Waiting	This activates a beep on the computer if a call is waiting/queueing and the Operator is idle.
Beep while on Call	This beeps on the computer if IPFX Console Operator is on a call.
Use Office Number	When you wish to transfer or dial from the IPFX Console, the number used for the transfer or dial will be the office extension number not the actual extension number. This is used when you have virtual extensions that, when dialling from a virtual number, they all route to a specific phone that you wish the call to terminate on.
Enable Directory Context Menu	This toggles the right click in the Directory Listing between bringing up the users Location Screen immediately or providing a Context Menu that shows the normal directory shortcut menu provided in the standard IPFX Clients.
Edit Call Notes	Allows an operator to add notes to a call (see "" on page 12).
Extension Tab Count	Use this option to customize the number of Page Tabs on the IPFX Console Screen.
Password for This Screen (blank = not	Password protects IPFX Console Settings.

required)

Hold Recall

To change the time a Held call will recall back to the IPFX Console.

See Also

Options and Settings
Auto Action Controls

Keys Tab

The Keys tab allows to you assign call control functions to your keyboard's Function keys. For more about programming your function keys, see <u>Function Shortcut Keys</u>.

See Also

Configuration Settings

Options and Settings

LDN Tab

PABX Tab

Night Service Tab

LDN Tab

LDNs are only available for IPFX Console (TAPI only). For Queuing Consoles, please refer to Queue Administration in the IPFX Administrator Guide.

The LDN Tab will be set up when the IPFX Console is installed. The Extension ID relates to an incoming number and the description labels that number. i.e. XYZ Company.

This allows the Operator to identify what number the caller has dialled so they can greet the caller appropriately.

The Answer On Tab allows you to select which Tab will display when the call is presented.

Note LDNs are useful when the Operator answers more than one main number.

Important Note If you are using a Queuing Console, then priorities and descriptions are handled as part of the Queue - see your IPFX Administrator for more details.

See Also

Configuration Settings

Options and Settings

Keys Tab

PABX Tab

Night Service Tab

PABX Tab

This holds information and settings relating to your extension and the way it is configured within the PABX. Altering any of these settings, could result in problems with your extension.

This Tab should not be touched or changed by anyone other than a Qualified Technician or System Administrator.

See Also

Configuration Settings

Options and Settings

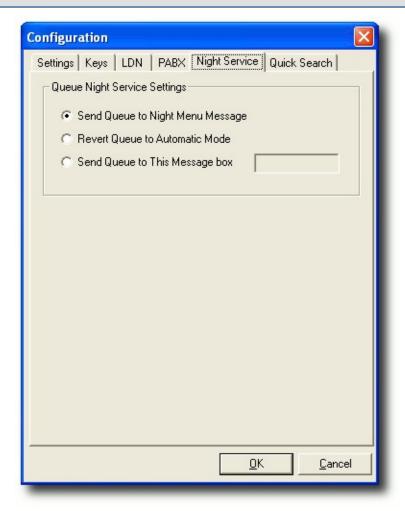
Keys Tab

LDN Tab

Night Service Tab

Night Service Tab

Note: If this Tab is not visible, please see your IPFX Administrator for access rights. Access to the Night Service Tab a User Feature Level for Queue Control.



This setting determines the what happens when you click the toolbar's Night Mode button:

- **Send Queue to Night Menu Message:** Calls entering the operator queue are delivered to the default Night Menu message.
- Revert Queue to Automatic Mode: Places the queue into Automatic mode; the queue will enter an open or closed state according to its defined
- Send Queue to This Message box: Calls entering the operator queue are delivered to the specified message box.

Note: If you are in Night Service when you make the changes, you have to set to Day, then back to Night for this to operate.

See Also

Configuration Settings

Options and Settings

Keys Tab

LDN Tab

PABX Tab

Quick Search Tab

In this tab, you can select the fields that will be matched in <u>Quick Searches</u>.

See Also

Configuration Settings

Options and Settings

Keys Tab

LDN Tab

PABX Tab

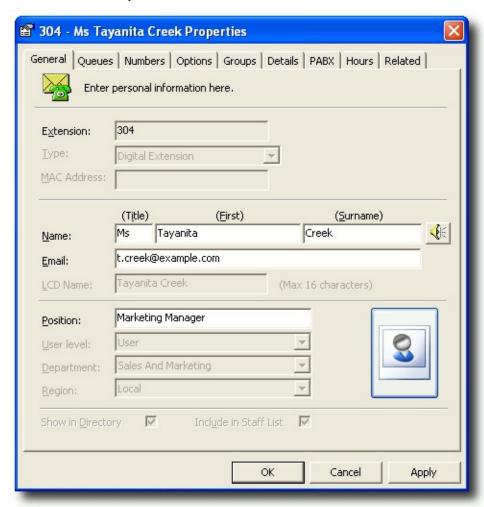
Night Service Tab

Changing your extension's properties

Details Button



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



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

Setting up your mailbox phone numbers

Properties

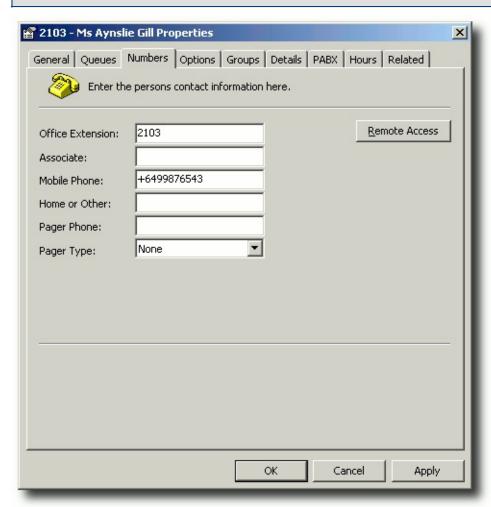
Setting up your mailbox phone numbers

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.

Note: Do not remove or change the Office Extension Number.



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

Properties

Properties

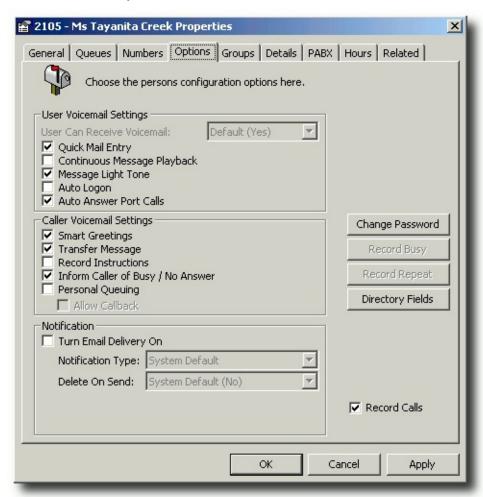
P<u>r</u>operties

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.



User Voicemail Settings

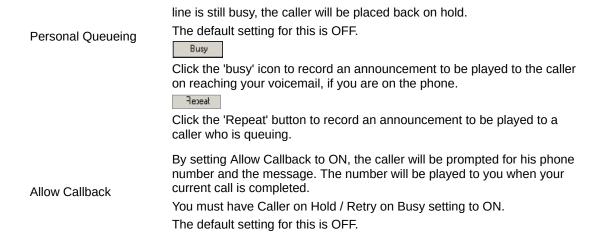


Allows users to listen to their new messages immediately after they have

Quick Mail Entry	entered their password instead of having to listen to the Main Menu 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 Message Playback*	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.
	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

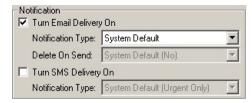
This Feature	Does This
Smart Greetings*	Smart Greetings will inform your caller where you are and your expected return time for all locations other than Office. i.e. 'I'm sorry, John Smith is in a meeting until 3pm' (then your own personal location greeting is played). If you do not use Smart Greetings, 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



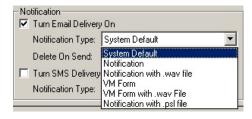
Note: For more information on the features marked with a *, please refer to your IPFX Voicemail (Phone only) User Guide.

Email

Users can be advised by email when they have a voicemail message. Check the *Turn Email Delivery On* box.



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 way 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 .way 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

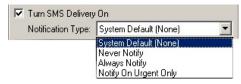
This is if you wish to delete the voicemail message on the voicemail mailbox when you have a rule set up to send it to another folder within your email client. Select from the drop-down menu. Yes/No. The Default is No.

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.



Change Password

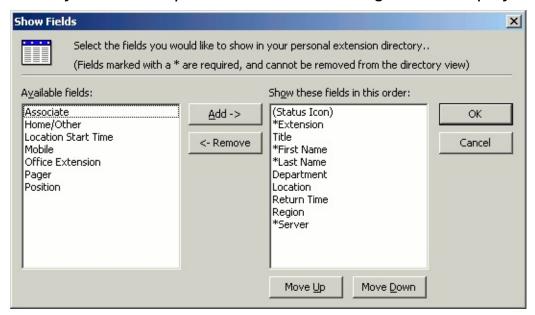
Allows you to change your voicemail mailbox password.

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:



- 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.



Changing your extension's properties

Details Button

Setting up your mailbox phone numbers

Reference Information

Tool Bar Icons

Icon	Function	Description
Various:	Set Location	See <u>Locations and</u> <u>default return times</u> .
0	Pause call delivery	See <u>Pause Call</u> <u>Delivery</u> .
	Options	See <u>Options and</u> <u>Settings</u> .
В	Show text as bold	Toggles the text on DSS keys between regular and bold.
FS	Toggle name display order (on DSS keys)	Toggles the name display on DSS keys between "FirstName Surname" and "Surname, FirstName".
≜ ↓	Sort buttons alphabetically	Sorts DSS keys alphabetically.
1 ↓	Sort buttons numerically	Sorts DSS keys numerically.
(i p	View notes	View and edit Operator Notes.
■ / ■	Operator Voicemail	Check operator voicemail messages
		Manually set Console

्रः	Day Service	to Day Service mode.
C	Night Service	See <u>Night Service</u> <u>Tab</u> .
(Console Unattended	Set Console to Unattended mode. See Taking a Break from the Console.
&	Fire/Emergency	See Leaving the Console during an Emergency.
==	View DSS keys	Shows DSS keys.
E	View directory by extension	Open the internal directory, sorted by extension number.
E	View directory by First name	Open the internal directory, sorted by first name.
E	View directory by Surname	Open the internal directory, sorted by surname
M	View external directory	Open the company's external phone directory.
•	Insight	When a call is diverted to the operator from an extension, this button opens that extension's Insight window. See Insight - Viewing Extension Details and Appointments.

44	Display Call History	Shows the call history.
À	Record System messages.	Record Break and Fire/Emergency messages. Requires Administrator privileges.
*	Telephone & + symbol	Add Extensions/Voicemail mailboxes See Creating Mailboxes.
%	Telephone & x symbol	Delete Extensions/Voicemail mailboxes. See Deleting Mailboxes.
4	Bell	See <u>Using Alarm Bells</u> on the IPFX Console.

See Also

Reference Information

Incoming Call Line Key

Colours

Glossary of Terms and Abbreviations

Operator Message Script

Suggestions

Auto Attendant Script

Suggestions

Incoming Call Line Key Colours

This Icon Means This

Incoming call RINGING at Queue

ACTIVE call

Call QUEUING at IPFX Console

All on HOLD

See Also

Reference Information

Tool Bar Icons

Glossary of Terms and

Abbreviations

Operator Message Script

Suggestions

Auto Attendant Script

Suggestions

Glossary of Terms and Abbreviations

This Abbreviation

Means This

DD Button Direct Dial Button.

DSS Direct Station Selection.

LDN1 First Line Directory Number.

LDN2 Second Line Directory Number (Often shown as a 0800 number).

NO ANS No Answer from that Extension.

RECALL A call that is unanswered by either a person or by Voicemail, will recall back to

the Operator's IPFX Console.

TOLL Toll Over-ride.

Voicemail Automatic Telephone messaging system.

See Also

Reference Information

Tool Bar Icons

Incoming Call Line Key

Colours

Operator Message Script

Suggestions

Auto Attendant Script

Suggestions

Operator Message Script Suggestions

An Operator Recording Script is used in the circumstance when the Operator is preparing what to say in the Operator Overflow, Fire/Emergency, Break, Day Message and Night Message. These Recordings are called Auto Attendant Messages.

Operator Overflow Message.

"Welcome to (Company Name)

Our Operator is attending to another call at present

Please continue holding and your call will be answered as soon as possible.

Thank you"

OR

"Welcome to (Company Name)

Our Operator is attending to another call at present

If you know the extension number of the person you require please dial it now,

For a Staff Directory Press (1)

Or please continue holding and your call will be answered as soon as possible. Thank you"

Operator Break Message.

"Welcome to (Company Name)

Unfortunately our Operator is unable to attend to your call at present If you know the extension number of the person you require please dial it now,

For a Staff Directory Press (1)

Or please hold to leave a message which we will respond to, at the earliest

opportunity. Thank you"

Fire/Emergency Message.

"Welcome to (Company Name)

Unfortunately we cannot attend to your call at present, as we are experiencing a situation that has required us to exit the building. However, please leave your Name, Contact details and a brief message after the tone and we will contact you as soon as we can. Thank you"

OR

"Welcome to (Company Name)

Unfortunately we cannot attend to your call at present, as we are experiencing a situation that has required us to exit the building. However, if you want to leave us a message please press (1) now and you will be able to record your Name, Contact details and a brief outline of your requirements and we will contact you at the earliest opportunity. Thank you."

See Also

Reference Information

Tool Bar Icons

Incoming Call Line Key Colours

Glossary of Terms and Abbreviations

Auto Attendant Script Suggestions

Auto Attendant Script Suggestions

Day Time Auto Attendant Message.

"Welcome to (Company Name)

If you know the extension number of the person you require please dial it now,

For a Staff Directory Press (1)

Or to speak to our operator Press (0)"

Night Time Auto Attendant Message.

"Welcome to (Company Name)

You have called outside our usual business hours of (8.30am) to (5.30pm)

If you know the extension number of the person you require please dial it now.

For a Staff Directory Press (1)

Or to leave an after hours message Press (2)

Thank you"

Note: The Auto Attendant Day and Night Message must be recorded using the Message Administration Menu. To do this refer below:

In This Section

Recording the Auto
Attendant Day Message:

Recording the Auto
Attendant Night Message:

See Also

Reference Information

Tool Bar Icons

Incoming Call Line Key
Colours

Glossary of Terms and Abbreviations

Operator Message Script Suggestions

Recording the Auto Attendant Day Message:

Using your phone at reception

- 1. Access your Voicemail mailbox in the usual way (The Default Mailbox extension number is 0#)
- 2. From the Main Menu Press 9
- 3. Press 2 to Record the Day Message
- 4. Now follow the instructions as given by VoiceMail.

See Also

Auto Attendant Script Suggestions

Recording the Auto Attendant Night Message:

Recording the Auto Attendant Night Message:

Using your phone at reception:

- 1. Access your Voicemail mailbox in the usual way (The Default Mailbox extension number is 0#)
- 2. From the Main Menu Press 9
- 3. Press 3 to Record the Night Message
- 4. Now follow the instructions as given by Voicemail.

See Also

Auto Attendant Script Suggestions

Recording the Auto Attendant Day Message:

TAPI Mode

Information in this section only applies to the IPFX Console running in TAPI mode.

Answer key colours

This Colour	Means This
Black	NORMAL Status
Red	Extension is BUSY Status
Yellow	Extension is NOT ANSWERING Status
Green	Extension has a Call Forward to the Operator
Blue	Call has Recalled back to Operator

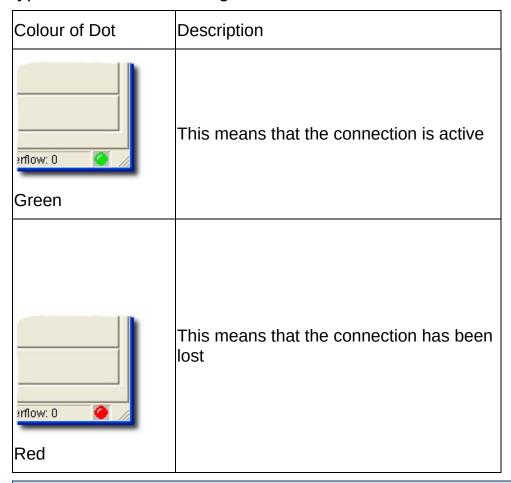
See Also

TAPI Mode

TAPI Console Connection

TAPI Console Connection

If you have a NEC PABX and your phone has a TAPI Adaptor that connects your phone to your PC, your IPFX Console will display whether the computer and telephone adaptor are communicating, with an LCD type dot on the bottom right corner of the IPFX Console.



Note: If the connection is lost, please check the TAPI cable at the back of the phone and where it joins the PC. Also check the power (small black cable) that goes into the phone and at the power outlet.



Suppressing Voice Capture



PBX Dependent Feature!

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.
- 2. 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.

FAQs

"What do I do if I am in the middle of dialling a number on my computer keyboard and I decide not to call now?"

Click the Cancel button on your IPFX Console. This will take your LCD Screen back to the Green Idle status.

"Do I have to Press Release to transfer calls when answering several calls in a row?"

Only if the Release setting is on Manual. The Release (Auto) function saves you the trouble of having to release each call. If you chose not to use this function then you will have to release each individual call prior to answering the next incoming one.

"What happens if I transfer a caller to an extension that is busy or is not answered?"

If an extension has Voicemail, then (in most cases) a Voicemail greeting will answer the call. If the extension does not have Voicemail, then the call will return to your IPFX Console as a Recall.

"What happens if I transfer a call to an extension with Voicemail and I want to retrieve that caller to provide other options?"

If an extension is answered by Voicemail, then press the star key three times on the telephone (***) and the call will be returned to you. You can then proceed as normal.

"What if I transfer a call to the wrong extension?"

A. If the call hasn't been answered or gone into Voicemail, you can click the Retrieve Last (Ret Last) button and the call will be returned to you. You can then proceed as normal.