# **IPFX Live Toolbar**

Product version 4.3 SP4



**About This Guide** 

# Who This Guide Is For

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

See Also

About This Guide

**Typographical Conventions** 

Getting Help

# **Typographical Conventions**

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

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

Formatting convention	Type of Information
Triangular Bullet(Ø)	Step-by-step procedures. You can follow these instructions to complete a specific task.
Special Bold	Items you must select, such as menu options, command buttons, or items in a list.
Emphasis	Use to emphasize the importance of a point or for variable expressions such as parameters.
CAPITALS	Names of keys on the keyboard. for example, SHIFT, CTRL, or ALT.
KEY+KEY	Key combinations for which the user must press and hold down one key and then press another, for example, CTRL+P, or ALT+F4.
	Information that applies to the IPFX Director platform only.
CCM	Information that applies to the IPFX for CallManager platform only.
NEC	Information that applies to the IPFX for NEC platform only.

#### See Also

About This Guide Who This Guide Is For Getting Help

# **Getting Help**

Press F1 within any IPFX screen for online product help.

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

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

Who This Guide Is For

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# What is IPFX Live Toolbar?

IPFX Live Toolbar is a computer-based version of an IPFX Contact Centre wallboard.

IPFX Live Toolbar is a powerful, easy to use configuration utility which allows you to see queue statistics at a glance, offers the functionality of dialling and transferring calls, changing your location, and viewing other internal extensions, IPFX Contact Centre Queues and Agents.

IPFX Live Toolbar is a floating application, which means that it can appear in front of all other active windows.



You can move the IPFX Live Toolbar anywhere on your screen by clicking and dragging the IPFX Live Toolbar around your screen. When you close and reopen IPFX Live Toolbar it will appear in the same place that you left it.

This guide explains how to use the IPFX features in the **IPFX Live Toolbar** and Windows System Tray.

# **Before You Begin**

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

- 1. Dial your voicemail mailbox number (check with your Network Administrator if you do not know the number)
- 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 #

9. Press 1 to Listen to your greeting; or

Press 2 to Re-record

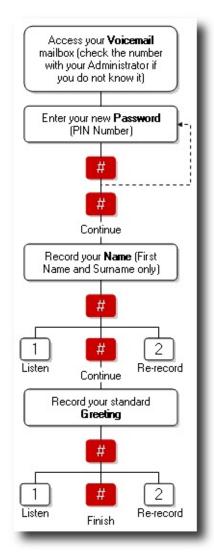
10. Press # to Finish and Hang Up (when satisfied with your greeting)

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



# **Starting IPFX Live Toolbar**

# To start the IPFX Live Toolbar application:

- 1. Click on the IPFX Live Toolbar link in the Start menu: Start > All Programs > IPFX > IPFX Live Toolbar.
- 2. The IPFX Live Toolbar toolbar will appear:

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From left to right these icons represent:

Location, Directory, View Queues, Dial, Send to Voicemail, Send a Message, Record, Worktime, Reports, Options.

**Note:** IPFX Supervisor Agent and IPFX Administrator will be able to view the Configuration icon

Using The IPFX Live Toolbar

# **Using locations**

In This Section
What are locations?
Setting your location in IPFX Live Toolbar
Returning from a location

Setting another extension's location

Entering Operator Instructions

Editing your Location Settings in Live Toolbar

Changing your extension's properties

**Call Profiles** 

See Also

Using The IPFX Live <u>Toolbar</u> **Directory** Queues Dial Send to Voicemail Send a message Record Work Time **Configuration Reports Display Screen Properties** Insight - Viewing Extension **Details and Appointments** Suppressing Voice Capture

# What are locations?

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

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

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

	See Also
	Using locations
	Setting your location in IPFX Live Toolbar
	Returning from a location
In This Section	Setting another extension's
Locations and default return times	Iocation Entering Operator Instructions Editing your Location Settings in Live Toolbar
	<u>Changing your extension's</u> properties <u>Call Profiles</u>

### Locations and default return times

Location	Default return	time
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Break Codes: declaring a specific type of break

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Queue (Yellow phone)

**Note:** The Queue location is only available if the Call and Contact Centre module has been purchased.

Office (White phone)

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.

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

1 hour

Do Not Disturb or Prime

1 hour Note: The Prime Time module must be purchased separately.

Gone Out

Gone For Day

<u>7</u>

On Leave

Sick Leave

🍺 On A Break

کری Away On Business Beginning of business, the next day.

Beginning of business, the next day.

Beginning of business, the next day.

15 minutes.

Beginning of business, the next day.

# Setting your location in IPFX Live Toolbar

To set or change your location, open the **Location screen** by clicking on the **Location** 

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

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

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

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



**Note:** Your IPFX Administrator can add and edit break codes. button on the IPFX Live Toolbar:



# **Returning from a location**

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

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

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

			has expire location no	
22	2	?	*	
Office	Queue	Other	Later	

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

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

### See Also

**Using locations** 

What are locations?

Setting your location in IPFX Live Toolbar

Setting another extension's location

**Entering Operator Instructions** 

Editing your Location Settings in Live Toolbar

Changing your extension's properties

Call Profiles

# Setting another extension's location

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

	See Also
	Using locations
	What are locations?
In This Section	<u>Setting your location in</u> IPFX Live Toolbar
Setting another extension's location from the Directory	Returning from a location
using Live Toolbar	Entering Operator
Setting a location for	Instructions
multiple extensions	Editing your Location Settings in Live Toolbar
	<u>Changing your extension's</u> properties
	Call Profiles

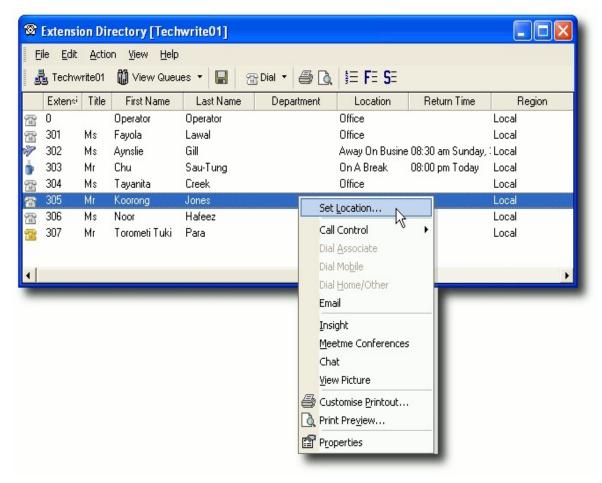
# Setting another extension's location from the Directory using Live Toolbar

You can change any extension's location from the Directory:

1. Click on the Directory button on the toolbar.



2. The Directory screen will appear:



3. Right-click on the extension whose location you want to set and select Set Location from the context menu.

The Location screen will appear:

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Time 8:00 AM	•		Mar	ch 2	006			0		Ар	ril 20	06		
8:15 AM	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
8:30 AM 8:45 AM	27	28	1	2	3	4	5						1	2
9:00 AM	6	7	8	9	10	11	12	3	4	5	6	7	8	9
9:15 AM	13	14	15	16	17	18	19	10	11		B		15	16
9:30 AM	20	21 28	22	23	24	25	26	17 24	18	19	20	21	22	23 30
9:45 AM 10:00 AM	27	20	29	30	31			24	25 2	26	27 4	28 5	29 6	7
10:00 AM								1	2	0	4	0	0	1
ick Leave till Friday April 1 <sup>,</sup> Operator Instructions	4, 200	)6 at	8:30	AM									Cle	ear
														~

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

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



## Setting a location for multiple extensions

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

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

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

3. Select Set Location...

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

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Time 11:00 AM	~	•		Mar	ch 2	006					Ар	ril 20	06		Þ
11:15 AM 11:30 AM 11:45 AM		<u>Mon</u> 27 6	Tue 28 7	Wed 1 8	<u>Thu</u> 2 9	Fri 3 10	Sat 4 11	<u>Sun</u> 5 12	Mon 3	Tue 4	Wed 5	Thu 6	Fri 7	Sat 1 8	<u>Sun</u> 2 9
12:00 PM 12:15 PM 12:30 PM 12:45 PM		13 20 27	14 21 28	15 22 29	16 23 30	17 24 31	18 25	19 26	10 17 24	11 18 25	12 19 26	13 20 27	14 21 28	15 22 29	16 23 30
1:00 PM 1:15 PM	~	140							1	2	3	4	5	6	7
n A Meeting till 1 Iperator Insti		orii 18	, 200	16 aC	11:30	) дічі									ear
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- 4. Click a location button to set a new location for the selected extensions.
- 5. Click OK.

The Set Multiple Locations screen appears:



6. Click Yes.

All the selected extensions will now show the new location.



## <u>Toolbar</u>

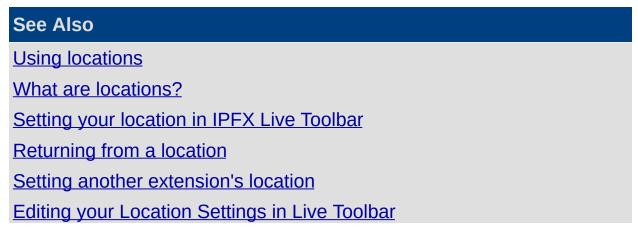
# **Entering Operator Instructions**

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

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

Location - Aynslie Gi	II (30	2)												
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Time 8:00 AM	•		Mar	ch 2	006					Ар	ril 20	06		
8:15 AM 8:30 AM	<u>Mon</u> 27	Tue 28	Wed 1	Thu 2	Fri 3	Sat 4	Sun 5	Mon	Tue	Wed	Thu	Fri		Sun 2
8:45 AM 9:00 AM 9:15 AM 9:30 AM 9:45 AM 10:00 AM 10:15 AM	6 13 20 27	20 7 14 21 28	8 15 22 29	9 16 23 30	10 17 24 31	4 11 18 25	5 12 19 26	3 10 17 24 1	4 11 78 25 2	5 12 19 26 3	6 13 20 27 4	7 14 21 28 5	1 8 15 22 29 6	2 9 16 23 (1) 7
Away On Business till Sund Operator Instructions	ay Apr	il 30,	2006	5 at 8	3:30	AM								ear
Meeting VIP clients in Singa	apore ·	- dire	ct en	quirie	es ab	iout t	he K4	5 acco	ount (	to Fay	yola.			<
										<u>о</u> к		9	<u>ance</u>	

## Click OK.



Changing your extension's properties Call Profiles

# **Editing your Location Settings in Live Toolbar**

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

To access your Location Settings, click on the Location icon in the Live Toolbar.

## To edit your location settings:

1. Start from your location screen:

Location - 301														
🖀 🗃 😤 i	j-	ł	C	5	Ø	5	2	0	•	A	2	0		
Time Unknown 12:15 AM	4		Mar	ch 2	006					Ap	ril 20	06		
12:30 AM 12:45 AM 1:00 AM 1:15 AM 1:30 AM 1:45 AM 2:00 AM 2:15 AM	27 6 13 20 27	28 7 14 21 28	1 8 15 22 29	2 9 16 23 30	3 10 17 24 31	4 11 18 25	5 12 19 26	3 10 17 24 1	4 11 18 25 2	5 19 26 3	6 13 20 27 4	7 14 21 28 5	1 8 15 22 29 6	2 9 16 23 30 7
Office Operator Instructions														ear
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- 3. The Location Settings screen appears:

Diversion After Busy or No Answer Immediately Divert To: Voice Mail		Normal Messages function Vo Notification Urgent Messages enable	Note: Message waiting lights function independently of your notification settings. If supported by your PABX you can enable or disable this feature using Preference Settings from	
Greetings Standard Office Busy Name Caller Transfer Keys Operator Operator Associate Mobile Phone Home/Other Pager Service	Record Record Record Record		ain Menu.	

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

The Location Settings options are described below.

## Diversion

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



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

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

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

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

## Greetings

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

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

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

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

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

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

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

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

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

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

Greetings	
Standard	Record
C Office	Record
Busy	Record
Name	Record

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

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

## **Caller Transfer Keys**

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

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

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

#### to you:

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

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

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

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

### Notifications of new Messages

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

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

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

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

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

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

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

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

Notifications can be restricted to specific times and days:

Notification Times     All Hours     Busives: Hous     Calon     ✓ Monday     ✓ Toesday     Toesday     Toesday     To Mida     ✓ Thursday     ✓ Toesday     ✓ Toesday     ✓ Toesday     ✓ Satucday     ✓ Satucday     ✓ Sunday			
All Hours	(24 hours a da	y, 7 days a week)	
	8.00am to 5.30	)pm Monday to Friday	
Business Hours	hours to adher	changed to suit your business. You can a e to the local time zone or the CTServer dney, but your local time zone is in New eturn times.	timezone, eg: Main
Custom Hours	Actual days/tim	nes you want to be notified.	
Server Times	your region set	es are based on the CTServer time whic tings as denoted in the Caution Note. Fo s, please see your Administrator.	
		See Also	
		Using locations	
		What are locations?	
		<u>Setting your location in</u> IPFX Live Toolbar	
In This Section		Returning from a location	
Prime Time Tab		Setting another extension's location	

Entering Operator Instructions Changing your extension's properties Call Profiles

## Prime Time Tab

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

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

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

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

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

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

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

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

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

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

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

### Never tab

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

## Urgent tab

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

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

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

### Always tab

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



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

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

## See Also

Editing your Location Settings in Live Toolbar

Changing your extension's properties

## **Details Button**

<u>D</u>etails

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

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

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

#### Name

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

#### Email

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

Voicemail messages to be sent to your email client.

## Image

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

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

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

## **Viewing Queue Properties**

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

r	30	7 - Mr	Torometi Tuki	Para Pro	perties			3	×
G	General Queues Numbers Options Groups Details PABX Hours Related Enter default queue access information here.								
	Cal								
		Queue	Description	Access	Skill	Start Time		Work Time	
		401	Support Queue	Automa 👻	9 🔻	Instant 👻	Instant	▼ Default ▼	411
We	ork	time:	De	fault	-				
AL	ito i	Answer (	Queue Calls: 🔲 (	after 0	seco	onds.			
						1 1 		0% lin	
					Ok		Cancel	Apply	

	See Also
	<u>Changing your extension's</u> properties
	Details Button
In This Section	<u>Setting up your mailbox</u> phone numbers
Changing Work Time	Properties
Auto Answer Queue Calls	Groups Tab
Personal Queue Priority	

Viewing Site Specific Details PABX Tab Hours Related

## Changing Work Time

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

🗳 301 - Ms Fayola Law	al Propertie	s			
General       Queues       Numbers       Options       Groups       Details       PABX       Hours       Related         Image: Comparison of the second					
Call		-1.0			
Queue Descriptio		Skill None 🗸	Start Time		Work Time Default 👻
Work time:	Default	-		Add / Remo	ove Queues
Auto Answer Queue Calls: Personal Queue Priority:	Default None 2 Seconds 5 Seconds 10 Seconds 15 Seconds 20 Seconds 30 Seconds	, eco ; ; ;	onds. · ·	· · ·	0%
		0		Cancel	Apply

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

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

#### See Also

Viewing Queue Properties

Auto Answer Queue Calls Personal Queue Priority

## Auto Answer Queue Calls

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

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

Select the checkbox for Queue calls to be Automatically Answered.

See Also
Viewing Queue Properties
Changing Work Time
Personal Queue Priority

## **Personal Queue Priority**

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

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

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

#### See Also

Viewing Queue Properties

Changing Work Time

Auto Answer Queue Calls

## Setting up your mailbox phone numbers

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

## To enter your own contact numbers

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

	-	e Office Extension Num
2103 - Ms Aynsli	e Gill Properties	×
General Queues	Numbers Options Groups Details	PABX Hours Related
Enter th	e persons contact information here.	
Office Extension:	2103	Remote Access
Associate:		
Mobile Phone:	+6499876543	
Home or Other:		
Pager Phone:		
Pager Type:	None	
· • • • • • • • • • • • • • • • • • • •		
	ОК	Cancel Apply

3. Edit your phone details as required.

**Note:** Do not prefix your outside phone numbers with an outside line number, eg: 1 or 0. Do not enter spaces, dots, gaps or dashes when entering your phone numbers. And if networked with another site in

another country, ensure you enter the number with the country and area code, i.e. +6493571218.

See Also

Changing your extension's properties

**Details Button** 

**Viewing Queue Properties** 

**Properties** 

Groups Tab

Viewing Site Specific Details

PABX Tab

Hours

**Related** 

#### **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.

🖀 2105 - Ms Tayanita Creek Properties	×			
General Queues Numbers Options Groups Details PAB	K Hours Related			
User Voicemail Settings User Can Receive Voicemail: Default (Yes) Quick Mail Entry Continuous Message Playback Message Light Tone Auto Logon Auto Logon Auto Answer Port Calls				
Caller Voicemail Settings Caller Voicemail Settings Smart Greetings Transfer Message Record Instructions Inform Caller of Busy / No Answer Personal Queuing Allow Callback	Change Password Record Busy Record Repeat Directory Fields			
Notification Turn Email Delivery On Notification Type: System Default Delete On Send: System Default (No)	☑ Record Calls			
OK Cancel Apply				

#### **User Voicemail Settings**

**This Feature** 

**Does This** 

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

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

## Caller Voicemail Settings

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

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

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

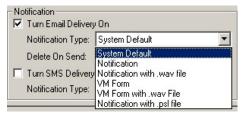
#### Email

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

Check the Turn Email Delivery On box.

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

Select Notification Type from the drop-down menu.



## System Default

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

#### Notification

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

#### Notification with .wav file

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

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

## VM Form

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

## VM Form with .wav file

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

## Notification with .psl file

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

## Delete on Send

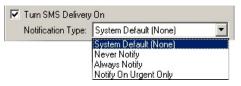
This is if you wish to delete the voicemail message on the voicemail mailbox when you have a rule set up to send it to another folder within your email client. Select from the drop-down menu. Yes/No. The Default is No.

## 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:

Show Fields		×
Select the fields you wo	are required, and cannot be removed from the directory view)         Show these fields in this order:         Add ->         (Status Icon)         *Extension         Title         *First Name         *Last Name         Department         Location         Return Time         Region         *Server	
	Move <u>Up</u> Move <u>D</u> own	

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

#### **Record Calls**

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

See Also
Changing your extension's

properties

**Details Button** 

Viewing Queue Properties

Setting up your mailbox phone numbers

Groups Tab

Viewing Site Specific Details

PABX Tab

Hours

**Related** 

#### **Groups Tab**

In This Section

Personal Voicemail

**Distribution Groups** 

Personal Contact Groups

#### See Also

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

**Details Button** 

Viewing Queue Properties

Setting up your mailbox phone numbers

**Properties** 

Viewing Site Specific Details

PABX Tab

<u>Hours</u>

**Related** 

## **Personal Voicemail Distribution Groups**

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

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

🖀 304 - Ms Tayanita Creek Properties		
General Queues Numbers Options Groups Deta	ils   PABX   Hour	s Related
Personal voice mail distribution		
050 - Management	Create	<u>Play/Record</u>
	<u>C</u> hange	Save
	Delete	
Personal <u>c</u> ontact groups	Create Change Delete	
Wildcards		
	Create	
	Change	
	Delete	
OK	Cancel	Apply

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

💱 Personal Voicema	ail Distribution Group	X
General		
Personal Voic	remail Distribution Group Details	
<u>N</u> umber (050-099):	050	
Description:	Test Group	
<u>Available Extensions:</u>	Group Extensions:	-
0 - Operator Operato 410 - Grant Fisher 411 - Tony Hartigan 412 - Masina Maher 413 - Tony test2 450 - Roy Bates 451 - Neil Gibson 452 - Natalia Bell 453 - Grant Petersen 454 - Craig Carr 456 - Sharon Brodie 457 - Joanne Hulme 458 - Joanne Hulme 458 - Joanne Hulme 458 - Joanne Price 459 - Andrew Richard 476 - Andrew McBeat	ds	
	OK Cancel	

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

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

## **To Change The Members In A Personal Distribution Group**

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

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

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

## **To Delete A Personal Voicemail Distribution Group**

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

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

## See Also

<u>Groups Tab</u>

Personal Contact Groups

## **Personal Contact Groups**

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

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

## **To Create your own Personal Contact Groups**

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

📸 418 - R	obyn Waters Properties	×
General	Queues Numbers Options Groups Details PABX Hours Related	1
U	Personal voice mail distribution groups.	
	Create Change Delete Play/Record	
麗	Personal contact groups. Test grp  Create Change Delete	
•	Wildcards New Plymouth Customers Test (( T Create Change Delete	
	OK Cancel Apply	

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

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

Contact Group Properties
Extension: 418 Description:
Contacts Extensions Wildcards
Personal Contact
Company Contact
OK Cancel

## **To Create a Personal Contact**

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

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

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

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

## Adding a Personal Contact to a Contact Group

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

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

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

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

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

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

🔀 Select Personal Contacts					x
General					
Select Personal Contacts					
Available:	>>		One - Home (0 Vest - Office (		143)
Sharon Brodie - Home (+64 0693571: Sharon Brodie - Mobile (+64 0219226 Sharon Brodie - Office (+64 0235711 Testing One - Mobile (025123456) Testing One - Office (09 345 6789) Tim Smith - Home (09 479 1000) Tim Smith - Mobile (021 1231234)	> < <<				
Tim Smith - Office (09 3456789) Wendy West - Home ((09) 412 9674) Wendy West - Mobile (0274 455595) WendyTest - Home (4121234)				1	
	(	Ж	Cancel		

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

Click OK.

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

tension:	418				
scription:	test grp				
ontacts E	tensions   Wilde	ards ]			
		Personal	Contact		
home (479 1					
√endyTest	(579 6443)				
				Greate	Select
		Company	y Contact	Greate	Select
		Company	v Contact	Greate	Select
		Company	v Contact	<u>C</u> reate	Select
		Company	Contact	Greate	Select

## Adding Extensions to your Contact Group

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

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

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

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

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

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

## Adding Wildcards to your Personal Contact Group

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

tension:	418	
escription:	test grp	
Conkacts   B	Extensions Wildcards	
	Wildcard	
New Plymo	uth Customers Test (06*)	

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

The Contact Group Wildcard Properties Screen displays.

• Enter the Description and Wildcard details as required.

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

• Click OK.

## To Add an existing Wildcard to your Group

Click the Wildcards Tab from the Contact Group Properties screen.

• Click the **Select** button.

The Select Wildcards screen displays.

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

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

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

## See Also

Groups Tab

Personal Voicemail Distribution Groups

## **Viewing Site Specific Details**

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

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

**Description:** the field name.

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

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

Editing a Value

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

## Window.

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

#### See Also

Changing your extension's properties

Details Button

Viewing Queue Properties

Setting up your mailbox phone numbers

Properties

<u>Groups Tab</u>

PABX Tab

<u>Hours</u>

<u>Related</u>

#### PABX Tab

## PBX Dependent Feature!



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

305 - Mr Koorong	Jones Properties	2
General   Queues   Num	bers Options Groups Details PABX Hours Related	
Enter phone	information here.	
DDI:		
Outbound CLID Type:	DDI	
Outbound CLID:		
Forward	Rgboot Extn	
Forward <u>B</u> usy:	51 Reset Extn	
Forward <u>N</u> o Answer:	51	
Forward <u>T</u> imeout:	20	
Forward <u>N</u> U:	51	
(Number Unobtainable) def	aults to No Answer if not set	
<u>R</u> oute Level:	International	
	OK Cancel Apply	_

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

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

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

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

## Hours

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

The Hours Tab displays the screen below.

🗃 305 - Mr Koorong J	ones Proper	ties			×
General Queues Numbe	General Queues Numbers Options Groups Details PABX Hours Related				
Extension-specifi	Extension-specific Business Hours				
Use setting from:	Company	•			
<u>S</u> tart Time:	08:30:00	-			
<u>E</u> nd Time:	17:30:00	-			
					_
		OK	Cance	el Apply	

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

## **To Change Settings**

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

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

#### See Also

Changing your extension's properties

Details Button Viewing Queue Properties Setting up your mailbox phone numbers Properties Groups Tab Viewing Site Specific Details PABX Tab Related

## Related

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

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

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

## **Related Extensions**

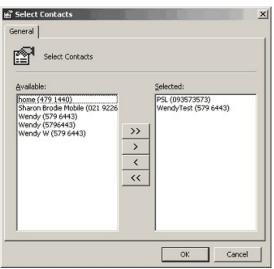
Click the **Select** button to display the **Select Extensions** screen.

General Select Extensions		×
Available: 110 - Grant Fisher	Selected:	
	ОК Са	ancel

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

#### **Related Contacts**

Click the Select button to display the Select Contacts screen.



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

Click OK.

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

# **Call Profiles**

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

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

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

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

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

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

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

## **To view Call Profile Settings**

1. Click the **Location** icon.

The Location screen will appear:

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

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

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

#### Adding a New Call Profile

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

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

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

301 - Location P	rofile Setti	ngs				
Profiles						
Description	Priority	Contact Groups	<u>S</u> ettings			
Primetime Never	6	Settings		Relevant	Locations	
Primetime Urgent	7	✓ Play Location G	Greetina	Office		
Primetime Always	8		file Greeting Record	🗌 In A Me	eeting	
Customers	7			Prime T	ïme	
General business	3		e Greeting Record	Gone C		
Family	9	(Only applies t	o Office location)		· · · · · · · · ·	
Managers Profile	0			On Holi		
		Normal Notifica	ation			
		C Urgent Notifica	ition		On Business	
		Priority 7				
				Validity T		
		Caller Transfer	Keys	C All Hou	rs 🖲 Business	Hours C Custom
		Key 0 Operato	r	Day	Start	End
		Key 1 No Tran	nsfer 💌	Monday	▼ 08:30	▼ 17:30
		Key 2 No Tran		Tuesday	▼ 08:30	▼ 17:30 ▼
		Key 2 No Tran	nsfer 👤	Wednesda	n <mark> 🔻</mark> 08:30	▼ 17:30 ▼
		Key 3 No Tran	nsfer 💌	Thursday	▼ 08:30	▼ 17:30
		Kaud III T		Friday	▼ 08:30	▼ 17:30
		Key 4 No Tran	nsfer 💌			
L		Default Voicema	ail 🔻 lie	Add	Remove	
Add Delete	Сору				Kelliovi	
				<u>o</u> k		el <u>A</u> pply

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

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

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

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

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

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

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

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

#### Add the Settings/Properties to your Call Profile

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

301 - Location P Profiles	rofile Setti	ngs	
Description	Priority	Contact Groups Settings	
Primetime Never	6	Settings Relevant Locations	
Primetime Urgent	- 7		
Primetime Always	8	To A Machine	
Customers	- 7	Play Caller Profile Greeting Record Prime Time	
General business	3	Personal Queue Greeting Record Gone Out	
Family	9	(Only applies to Office location)	
Managers Profile	0	🗌 On Holiday	
		Normal Notification     Sick Leave     On A Provide	
		_ OT A break	
		C Urgent Notification Away On Business	
		Priority 7 Validity Times	
		Caller Transfer Keys	
		Key 0 Operator Day Start End	
		Key 1 No Transfer  Monday  08:30  17:30	
		Tuesday v 08:30 v 17:30 v	
		Key 2 No Transfer Vednesda; • 08:30 • 17:30 •	
		Key 3 No Transfer V Thursday V08:30 V 17:30 V	
		Friday v 08:30 v 17:30 v	
		Key 4 No Transfer	
AddDelete	Сору	Default Voicemail	
		OK Cancel Apply	

#### Settings



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

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

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

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

(You must record an individual profile greeting).

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

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

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

Caller Transfer Keys

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

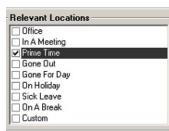
Change the **Caller Transfer Keys** that you want the caller to use.

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

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

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

#### Locations



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

Validity Times

• All Hours	Business Hou	urs C Custom
Day	Start	End
Add	Remove	

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

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

#### See Also

**Call Profiles** 

Adding a New Call Profile

# Directory

This section explains the options that are available when you click on the Directory icon in Live Toolbar.

## What is the Directory?

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

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

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

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

# **Dialing from the directory**

# To dial from your Directory Listing

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



The Directory will appear:

8	Extensio	n Dire	ctory [Demose	rver]			
E	ile <u>E</u> dit	<u>A</u> ctio	n ⊻iew <u>H</u> elp				
1	Demose	erver	🛍 View Queue	s • 🖬 🗃	Dial 🔹 🎒 🛕	i≡ F≡ S≡	
	Extensio	Title	First Name	Last Name	Department	Presence	Return Time
1	2101		Operator	Operator		Office	
B	2102	Ms	Fayola	Lawal	Management	Office	
7	2103	Ms	Aynslie	Gill	Customer Service	Away On Busine	: 08:30 am Friday, 26
3	2104	Mr	Chu	Sau-Tung	Administration	Queue	
1	2105	Ms	Tayanita	Creek	Sales and Marketin	On Holiday	08:30 am Friday, 25
留留	2106	Mr	Koorong	Jones	Administration	Office	
1	2107	Ms	Noor	Hafeez	Research and Dev	Office	
-	2108	Mr	Torometi Tuki	Para	Customer Service	Queue	
-							
	_	_					

2. Double-click on the extension you wish to dial.

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

or

Right-click on the extension you wish to dial.

A shortcut menu will appear:

				Set Presence	
				Call Control 🔹 🕨	Dial
				Dial <u>A</u> ssociate	Answer
Extension Di	ectory [Demos	erver]		Dial Mo <u>b</u> ile	<u>H</u> ang Up
<u>File Edit A</u> d				Dial <u>H</u> ome/Other	Blind Transfer
	<ul> <li>View Queu</li> </ul>	1		Email	Supervised Transfer
gg Demoserve				Insight	Complete Transfer
Extensio Titl	e First Name	Last Name		Meetme Conferences	Cancel Transfer
2101	Operator	Operator	9	<u>S</u> end an Instant Message	Hold
2102 Ms	Fayola	Lawal		<u>V</u> iew Picture	Resume
2103 Ms 2104 Mr	Aynslie Chu	Gill Sau-Tung	e	Customise Printout	Queue Hold
2105 Ms	Tayanita	Creek	R		Queue Resume
2106 Mr	Koorong	Jones	r S	<sup>1</sup> Properties	Hold For
2107 Ms	Noor	Hafeez		research and pey once	Diclaus
2108 Mr	Torometi Tuki	Para	0	Customer Service Queue	<u>Pickup</u> Conference

Click Call Control > Dial..., or Dial Associate, Dial Mobile or Dial Home/Other as required.

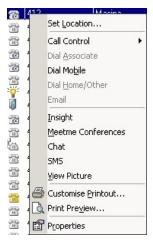
# See Also Directory What is the Directory? Dialling Other Available Numbers Chat Send an Email message from the Directory Extension Properties View Extension Images Customized Printout Print Preview Customizing the Directory in your IPFX Client Filtering the Directory Company Directory Personal Directory

# **Dialling Other Available Numbers**

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

## To dial another number associated with an extension

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



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

#### See Also

**Directory** 

What is the Directory?

Dialing from the directory

<u>Chat</u>

Send an Email message from the Directory

Extension Properties

View Extension Images

**Customized Printout** 

Print Preview

Customizing the Directory in your IPFX Client

Filtering the Directory

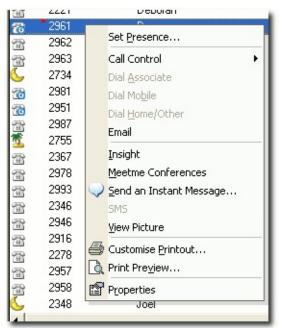
Company Directory
Personal Directory

# Chat

Chat enables you to chat online with another internal user.

# **To Chat online**

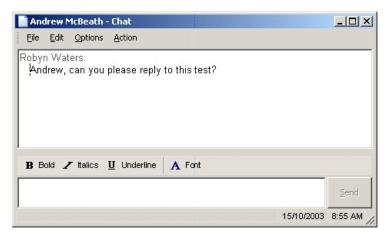
- Click into your Directory from the Main Toolbar.
- Right click on the user you wish to chat with in the Directory listing



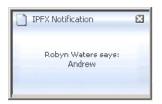
Click Chat.

The screen below displays.

	And	rew N	1cBeath -	Chat			
	Eile	Edit	Options	Action			
Г							
L							
L							
L							
L							
	вв	old 🥒	ttalics	Underline	A Font		
A	ndre	w, ca	n you ple	ease reply to	this test?		
					•		<u>S</u> end
						15/10/2003	8:55 AM



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



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



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



Dialing from the directory

Dialling Other Available Numbers

Send an Email message from the Directory

**Extension Properties** 

View Extension Images

**Customized Printout** 

Print Preview

Customizing the Directory in your IPFX Client

Filtering the Directory

**Company Directory** 

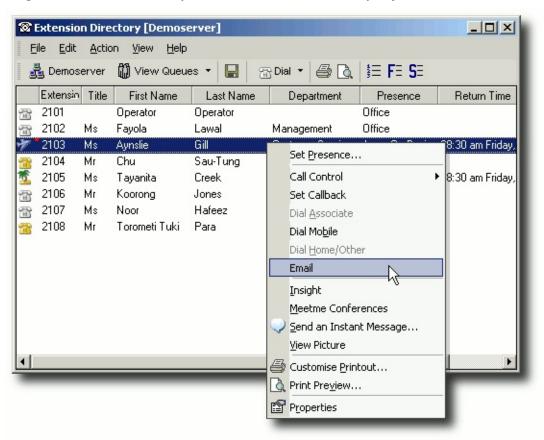
Personal Directory

# Send an Email message from the Directory

## How to send an Email message from the Directory

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

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



#### 3. Select Email.

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

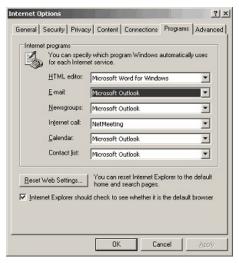
**Note:** In the IPFX Console client the 'Enable Directory Context Menu' in the Configuration\Settings Tab must be turned on.

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

1. Open Start\Control Panel\Internet Options

The Internet Options Screen displays.

2. Select the Programs tab as shown below.



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

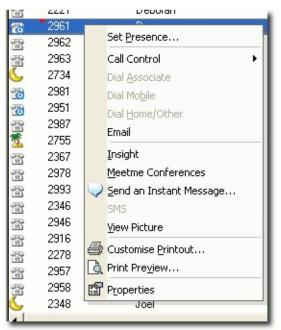
- 3. Use the drop-down menus if any changes are required.
- 4. Click OK.

See Also Directory What is the Directory? Dialing from the directory Dialing Other Available Numbers Dialing Other Available Numbers Chat Extension Properties View Extension Images View Extension Images Customized Printout Print Preview Customizing the Directory in your IPFX Client Filtering the Directory Company Directory Personal Directory

## **Extension Properties**

## To change the extension properties

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



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

Enter	personal informatio	n here.			
E <u>x</u> tension:	418	<u>Type:</u>	Digital Exte	ension	-
<u>T</u> enant:	1				
MAC Address:					
	(Title)	( <u>F</u> irst)		( <u>S</u> urname)	
<u>N</u> ame:	Ms Angie		W	ilson	
<u>E</u> mail:	angie.wilson@pe	rform-sol.com	1		
LCD Name:	Angie Wilson		(Max 16	characters)	
Position:	Communications I	Manager		Show in Directory	R
— <u>U</u> ser level:	Administrator		-	Incl <u>u</u> de in Staff Lis	t F
Department:	(none)		-		
<u>R</u> egion:	Auckland		•	<u>Imag</u>	je

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

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

#### See Also

<u>Directory</u>

What is the Directory?

Dialing from the directory

**Dialling Other Available Numbers** 

<u>Chat</u>

Send an Email message from the Directory

View Extension Images

**Customized Printout** 

**Print Preview** 

Customizing the Directory in your IPFX Client

Filtering the Directory

Company Directory

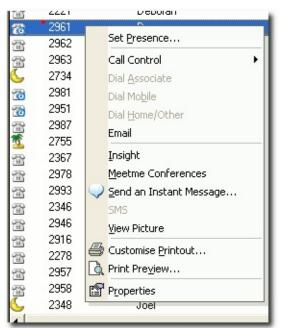
Personal Directory

## **View Extension Images**

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

# **Click into your Directory from the Main Toolbar.**

• Right click on the user you wish to view.



Select View Picture.

The user's picture displays.



# To embed your Image

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



 This allows you to embed a small picture of yourself into the Call Alert popup, so that when you call other users they get a picture of you as well as your details. By selecting this Image button, you can browse to find in which directory your image resides.



## See Also

Directory

What is the Directory?

Dialing from the directory

**Dialling Other Available Numbers** 

<u>Chat</u>

Send an Email message from the Directory

**Extension Properties** 

**Customized Printout** 

Print Preview

Customizing the Directory in your IPFX Client

Filtering the Directory

**Company Directory** 

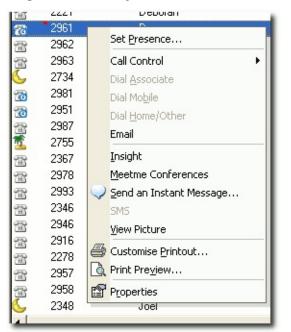
Personal Directory

# **Customized Printout**

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

## **To Customize a Directory Printout**

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



Select Customize Printout...

🗃 🖬 🖾 Preylem 🏙	Print 🖸	Apply *	Z Add Elber					
Extension		Column	Openator			Value		
Z FistNane								
Z Last Name								
2 Department	11							
Location	1							
Return Time	1							
Mabile								
Region								
7 Server	4							
	Extension	First Name	Last Name	Department	Location	Return Time	Mobile	Region_
	0	Operator	Operator		Office			
	410	Gnant	Fuher	Channel Sales	Office		021757600	Aucklary
	411	Tony	Hartigan	Service	Queue			Aucklary
	412	Matina	Maher	Financial	Office			Aucitlan
	413	Danian	Coventry	C++	Office			Aucilian
	414	Mark.	Walker	VB	Office		021 21 66 041	Aucklan
	415	Gienn	Nacdonald	Quality Assurance	Office		0211664346	Aucklan
	416	Don	MacKenzie	VB	Office		0212532975	Aucklan
	418	Robyn	Waters	Documentation	Office		021542050	Aucklan
	419	Kylie	Shipley	Project Nanagement	Gone Out	01:00 pm Tamorow	021412409	Aucklan
	450	Roy	Bate:	Service	Queue			Aucklan
	451	Neil	Gibsan	Financial	Office		021620295	Aucklary
	452	Natalia	Bel		Office		0211615755	Aucklane
	453	Grant	Peterten	Quality Assurance	Office		025922691	Aucillan
		Cusio	CAL	C++	Office			division.

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

The bottom right hand side of the screen will display your required settings and you can view the field contents. If you wish to reselect, do so and click Apply again.

## To Add a Filter to your Customized Printout

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

				Z Add Elker					
Extension		Column Operator Value							
	Fast Name	12		•					
Ý	Last Name								
Ý	Department								
×	Location								
×	Return Time								
	Mobile								
	Region								
2	Server	1							
		Extension	First Name	Last Name	Department	Location	Return Time	Mobile	Region_
		0	Operator	Operator		Office			
		410	Gnant	Fuher	Channel Sales	Gone Out	01:00 pm Today	021757600	Aucklere
		411	Tony	Hartigan	Service	Queue			Aucklan
		412	Matina	Maher	Financial	Office			Aucklan
		413	Danian	Coventry	C++	Office			Aucillan
		414	Mark.	Walker	VB	Office		021 21 66 041	Aucklan
		415	Gienn	Nacdonald	Quality Assurance	Office		0211664346	Aucklan
		416	Don	MacKenzie	VB	Office		0212532975	Aucklan
		418	Robyn	Waters	Documentation	Office		021542050	Aucklan
		419	Kylie	Shipley	Project Nanagement	Gone Out	01:00 pm Tamorow	021412409	Aucklan
		450	Roy	Bates	Service	Queue			Aucklan
		451	Neil	Gibsan	Financial	Office		021620295	Aucklary
		452	Natalia	Bel		Office		0211615755	Aucklan
		453	Grank	Peterten	Qually Assurance	Office		025922691	Aucillan
	Nove Up Mave Down	112	Cusio	CAL	C++	Office			division.

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

#### This Feature

#### **Does This**

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

ter Laite		Louise	Arbo The	10.00	1.0.0.0	Gener		
	e Bigutheat		2444160		Augine			
	Change Market		Doll on Take	0.000	designed			
			a contra contra	10.000				
				No bold int				
			Other Description					
			and the second	10.00				
				in second				
	Cash Accesso							
		Office		00100000				
	Denke	Othe						
	Genia	College .						
				-				
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				SCHOOL 4				
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#### See Also

Directory

What is the Directory?

Dialing from the directory

**Dialling Other Available Numbers** 

<u>Chat</u>

Send an Email message from the Directory

**Extension Properties** 

View Extension Images

**Print Preview** 

Customizing the Directory in your IPFX Client

Filtering the Directory

**Company Directory** 

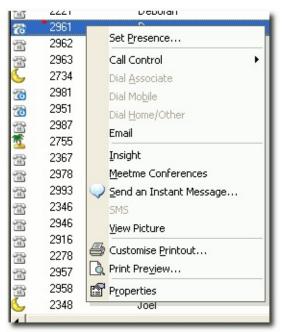
Personal Directory

## **Print Preview**

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

## **To preview a Directory Printout**

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



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

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464	248	Ston	Pareces.	Office		00903036		AALBNERS		
49	Notella	6-8		Othe		0014045705		ALCONTROL		
10	5491	749.041	Charle Astremote	Office		02562591		AREASH STOL		
44	Conty	Can	Cas.	Office				ALL NO. THE		
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P	Julea	P.4.0	Center	Office				ALLEYTER		
10	Autor	74400	Gente	Cellos				ALL BUTTO		
-	Pad .	Intel (Self-seal)		Cellar Cellar				Addition Theory Inc.		
<u>6</u> -	Circles.	Courtey	NB Kara	Critical Inc.				And Boy Trees		
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1473	UT.M.	COATE THE		080			A43263	ALBORT		

#### See Also

**Directory** 

What is the Directory?

Dialing from the directory

**Dialling Other Available Numbers** 

<u>Chat</u>

Send an Email message from the Directory

**Extension Properties** 

View Extension Images

**Customized Printout** 

Customizing the Directory in your IPFX Client

Filtering the Directory

**Company Directory** 

Personal Directory

# **Customizing the Directory in your IPFX Client**

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

## To customize your Directory view

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

Show Fields	Show Fields									
Select the fields you would like to show in your personal extension directory (Fields marked with a * are required, and cannot be removed from the directory view)										
Available fields: Show these fields in this order:										
Access Number Associate Birthday Building Location Home/Other Location Start Time Mobile Office Extension Pager	Add ->       (Status Icon) *Extension       OK         <- Remove									
	Move Up Move Down									

#### 9. Click Ok

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

#### restart.

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

#### See Also

Directory

What is the Directory?

**Dialing from the directory** 

Dialling Other Available Numbers

<u>Chat</u>

Send an Email message from the Directory

**Extension Properties** 

View Extension Images

**Customized Printout** 

**Print Preview** 

Filtering the Directory

Company Directory

Personal Directory

# **Filtering the Directory**

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

## **To Filter an Extension**

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

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

## **To Remove Filters**

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

See Also
Directory
What is the Directory?
Dialing from the directory
Dialling Other Available Numbers
<u>Chat</u>
Send an Email message from the Directory
Extension Properties
View Extension Images
Customized Printout

Print Preview Customizing the Directory in your IPFX Client Company Directory Personal Directory

## **Company Directory**

#### See Also

**Directory** 

What is the Directory?

Dialing from the directory

Dialling Other Available Numbers

<u>Chat</u>

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Extension Properties

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Personal Directory

#### In This Section

What is the Company Directory?

Dialling from your Company Listing

Transferring a Call to the Company Directory

Ending the Call

#### What is the Company Directory?

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

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

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

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

## See Also

Company Directory

Dialling from your Company Listing

Transferring a Call to the Company Directory

Ending the Call

#### **Dialling from your Company Listing**

## **To dial from your Company Directory**

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

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

or

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

A short cut menu will appear.



#### Click Dial.

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

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

#### See Also

Company Directory

What is the Company Directory?

Transferring a Call to the Company Directory

Ending the Call

#### Transferring a Call to the Company Directory

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

1. Right-click on the speed dial number.

The short cut menu will appear:

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

#### 2. Click Transfer.

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

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

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

#### See Also

Company Directory

What is the Company Directory?

**Dialling from your Company Listing** 

Ending the Call

#### **Ending the Call**

## To end the call

Hang up the phone,

or

Click Hang up on the top toolbar.

or

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

See Also

Company Directory

What is the Company Directory?

**Dialling from your Company Listing** 

Transferring a Call to the Company Directory

# **Personal Directory**

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

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

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

Personal Directory		
Description         Office         Mc           Image: Set State         52498996         52498996           Image: Jim Jones         09 3577569         021 8655           Image: Set		Home 09 6546655
		See Also
		Directory
		What is the Directory?
		Dialing from the directory
In This Section		Dialling Other Available
Accessing Personal Directory		<u>Numbers</u> <u>Chat</u>
Dialling from your Persor Listing	<u>nal</u>	Send an Email message from the Directory
Transferring a Call		Extension Properties
Ending the Call		View Extension Images
Adding / Editing a New Contact		Customized Printout Print Preview
		Customizing the Directory in your IPFX Client
		Filtering the Directory
		Company Directory

#### **Accessing Personal Directory**

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

#### 3. Click on **Personal Directory**.

The Personal Directory will appear.

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

#### See Also

Personal Directory

**Dialling from your Personal Listing** 

Transferring a Call

Ending the Call

Adding / Editing a New Contact

#### **Dialling from your Personal Listing**

# To dial from your Personal Listing

Double-click on the speed dial number you require.

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

or

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

The shortcut menu will appear:

Persona	l Direct	ory 💡				
Descriptio	n	Offi	св	Mobile		Home
💶 Joe Blogs		5249898				
🖅 Jimkon	nul office	00.0550	90	021005050	00 0540055	
🖭 SallyJo	Dial Offic Dial Mobile Dial Home Transfer Hangup		89	021 556835		
	New Conta Edit Conta Delete Cor	ct				

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

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



#### Transferring a Call

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

## To transfer a call

• Right-click on the speed dial number.

The shortcut menu will appear.

Persona	l Direct	ory 🚽				
Descriptio	n	Offic	в	Mobile		Home
💷 Joe Bloge		5249898				
💷 Jm. cn=		00.05505	90	021005050	00 0540055	
🖭 SallyJo	Dial Offic Dial Mobile Dial Home Transfer Hangup		89	021 556895		
	New Conta Edit Conta Delete Cor	ct				

#### 2. Click Transfer.

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

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

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

#### See Also

Personal Directory

Accessing Personal Directory

Dialling from your Personal Listing

Ending the Call

Adding / Editing a New Contact

#### **Ending the Call**

## To end the call

Hang up the phone

or

• Click Hang up on the top toolbar

or

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

See Also

Personal Directory

Accessing Personal Directory

**Dialling from your Personal Listing** 

Transferring a Call

Adding / Editing a New Contact

#### Adding / Editing a New Contact

## **To Add a new Contact**

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

## **To Edit an existing Contact**

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

#### See Also

Personal Directory Accessing Personal Directory Dialling from your Personal Listing

Transferring a Call

Ending the Call

# Queues

This section explains the options available when you click on the Queue icon on the IPFX Live Toolbar.

## What is a Queue?

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

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

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

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

#### See Also

<u>Queues</u>

Viewing Queues

Viewing Queue Agents and Call Flow

Viewing Queue Calls

Queue Pickup

Last Agent to Log out of Queue Notification

Queue Hold

**Queue Control** 

**Queue Properties** 

# **Viewing Queues**

## **To view Queues**

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

🔏 IPFX Live Desktop -	[Ext	ension	301]							
🖀 . 🖂 🝹	<u> </u>		<b>m</b> 72	3. 1		. 🗐		) 🖪		<b>b</b>
Location Voice Mail Ser	nd [	Directory	Queues Dial	Wor	rk Time	Cor	ntact Reco	ord Rep	orts Config	guration
General	Q	ueue	s [Techwrit	te01]						
		Queue	Description	Mode	Status	Calls	Longest	Agents	Answered	Abandone
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Ŵ	300	Operator Queue	Manual	OPEN	0	00:00	2	0	
Directory	Ŵ	401	Support Queue	Auto	OPEN	0	00:00	1	0	
<u>~</u>										
<u> </u>										
Operator Operator (0)										
-	•									F
							14/09/06		19:35	
	-	_			_	_				

Across the top of the queues are the Column Headers.

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

A description of the columns is set out below.

#### Queue

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

#### Description

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

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

a customer is calling from.

#### Mode

Mode indicates whether the queue is automatically or manually opened.

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

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

Queues will stay in manual mode until reset to auto.

#### **Status**

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

#### Calls

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

#### Longest

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

#### Agents

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

#### Answered

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

#### Abandoned

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

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

#### Other

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

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

#### GOS

Current (GOS) Grade of Service Level for queue.

#### Server

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

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

# Viewing Queue Agents and Call Flow

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

Oueue Neme

Double click on the queue required.

Agents=1		Calls=0 [00:00]		Calls Max=1 [00:02]	G05=0%	6	Ans=6	5	Abn=0	-	Queue Statisti
T Extr	First name	Last name	Location	Time	Answered	Avg Talk	Access	Skill	Entry Time	Entry Count	
gg 457	Joanne	Hulme	Office		0	00:00	Auto	1	Instant	Instant	D
G 453	Grant	Petersen	Office		0	00:00	Auto	9	Instant	Instant	11
3 458	Joanne	Price	Office		4	01:14	Auto	9	Instant	Instant	
<b>7</b> 476	Andrew	McBeath	On Holida	y 08:30 am 28/04/2003	0	00:00	Auto	9	Instant	Instant	82 - 29
B 459	Andrew	Richards	Office		0	00:00	Auto	9	Instant	Instant	Agent
@ 452	Natalia	Bell	Office		0	00:00	Auto	2	20 Secs	3	≻Information
@ 413	Greg	Weeks	Office		0	00:00	Auto	9	Instant	Instant	
@ 411	Tony	Hartigan	Office		2	01:30	Auto	9	Instant	Instant	
\$ 414	Duncan	Miler	Office		0	00:00	Q Pickup	None	Never	Never	
@ 450	Roy	Bates	Office		0	00:00	Q Pickup	None	Never	Never	
6 415	Glenn	Nacdonald	Queue		0	00:00	Auto	None	Instant	Instant	17

Top Segment<br/>of QueueShows all Agents (and their extensions), Location<br/>of each Agent, the Calls answered by each Agent,<br/>Average Talk time and Agent status.

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

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

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

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

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

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

Queue Name

**Queue Statistics** 

Agent Information

Viewing Queues

Viewing Queue Calls

Queue Pickup

Last Agent to Log out of Queue Notification

Queue Hold

**Queue Control** 

Queue Properties

#### Queue Name

Shows the Queue Name for quick reference.

## See Also

Viewing Queue Agents and Call Flow

Queue Statistics

Agent Information

#### **Queue Statistics**

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

#### Agents

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

#### Calls

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

#### Calls Max

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

#### GOS

Current Grade of Service level for the queue.

#### Ans (Answered)

Number of calls answered since the queue opened.

#### Abn (Abandoned)

Number of calls that have been abandoned from the queue.

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

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

#### Other

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

#### See Also

Viewing Queue Agents and Call Flow

Queue Name

Agent Information

#### **Agent Information**

#### Extension

The agent's extension.

#### **First Name**

The agent's first name.

#### Last Name

The agent's last name.

#### Location

The agent's current location setting.

#### **Return Time**

The time the agent is due to return.

#### Answered

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

## Avg Talk

The average talk time for each call.

#### Access

The level assigned to the agent for queuing.

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

#### Skill

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

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

#### **Entry Time**

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

#### **Entry Count**

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

# See Also

Viewing Queue Agents and Call Flow

Queue Name

**Queue Statistics** 

# **Viewing Queue Calls**

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

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

or

Bottom

Double-click the queue you want to view.

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

Agents=2		[00:00] 0=als]	(	alis Max=1 [00:15]	G05=0%		Ans=3		Abn=0		Other=0	
Extra	First name	Lastname	Location	Time	Answere	Avg Tal	Access	Skill	Entry Time	Entry (	Count	
459	Andrew	Richards	Queue		0	00.00	Auto	9	Instant	Instant		
458	Joanne	Price	Office		0	00:00	Auto	9	Instant	Instant		
453	Grant	Petersen	Gone Out	12:00 pm Today	0	00:00	Auto	None	Never	Never		
476	Andrew	McSeath	Queue		1	10.51	Auto	9	Instant	Instant		
窗 457	Joanne	Huime	Office	-	0	00:00	Auto	1	Instant	Instant		_ Queue
@ 414	Duncan	Miler	Office		0	00:00	Q Pickup	1	Instant	Instant	1 7	
413	Greg	Weeks	Office		2	06:52	Auto	9	Instant	Instant		Agents
<b>雷</b> 452	Nataña	Bell	Office		0	00:00	Auto	2	20 Secs	3		
\$ <sup>450</sup>	Ray	Bates	Office		D	00:00	Q Pickup	None	Never	Never	1	
•												
Queue	e Calls											Custo me
	idn Subje	ct	Caller		Status Qu	eue Time	Ring Time	Tak Tine	Trunk 1	Type		Calls
41	3 Voice I	fal Support	97736	00	Answered 00	07 (	10:01	01:34	tili q	ueue Call	ſ	Queuing

All Calls Queuing including:

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

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

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

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

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

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

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

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

#### **Queue Calls**

#### Extension

The extension of the agent who has answered the call.

This will only show if the call has been answered.

## Subject

The queue name that the caller came through.

## Caller

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

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

#### **Status**

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

#### **Queue Time**

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

## **Ring Time**

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

#### Talk Time

The length of conversation time.

#### Wrapup Time

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

## Trunk

The trunk line the call came in on.

## Туре

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

## See Also

Viewing Queue Calls

Document Queuing

How a Callback presents itself to an Agent

#### **Document Queuing**

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

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

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

nts=2 o	£4	Calls=1 [	01:01]		Calls Max:	=3 [06:27]			GO5=50%			Ans=13
Extrv	First name	Last name	Location	Ret	um time	Answered	Avg Talk	Aco	ess Ski	Entry Time	5	
2247	John	Manson	Office			0	00:00	Auto	5	Instant	Inst	ant
2249	Malik	Hussain	Queue			4	00:06	Auto	9	Instant	Inst	ank
2250	Matthew	Moore	Office			0	00:00	Auto	9	Instant	Inst	ant
2252	Anthony	Pengue	Queue	<u>.</u>		9	00:05	Auto	5	Instant	Inst	ant
E-tr	0.4		Calar		Chakus	Oneres	Time Dise	T	Tall, Tau	Network Time	Teach	7
Extr	Sub		Caler Anthory.Pengue@	ipfx.com	Status	Queue 01:01	Time Ring 00:00	) Time	Talk Time 00:00	Wrapup Time	Trunk	Queue Email

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

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

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

In order for an agent to receive e-mail or fax messages, the agent must

be enabled in the appropriate media tab of the **Queue Properties > Agents Tab** screen.

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

See Also

Viewing Queue Calls

Queue Calls

How a Callback presents itself to an Agent

#### How a Callback presents itself to an Agent

#### This is an Additional Module

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

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

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

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

Current Calls				X
Contact View Delete Ha	ka barangup <sup>™</sup> My Voice Ma	il 🔪 • Listen Start	Work Time Options	-
🕨 Play 🗸 Accept 🗙 Delete	🕂 Reschedule Da	te Today 🔽 Time	5:45 PM 🝷 🗸	
From: Harry Potter	Reason: AQ1 - Ca	allback Queue	Queue Time: 01:23	
Caller	Status		Duration	
🛒 Harry Potter	Answered 00:3	36		
Wrapup codes:				
System	Code 🗠 🔤		Description	
				Apply

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

The correct procedure for handling callback calls is either:

Accepting the callback, or

 $\bigcirc$  Rescheduling the callback for a later time.

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

#### See Also

Viewing Queue Calls

**Queue Calls** 

**Document Queuing** 

# Queue Pickup

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

## To pick up and transfer a call

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

Û

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

vgents=2		[00:00] 0=als]	(	alis Max=1 [00:15]	G05=	1%	Ars=3		Abn=0	Other=	0	
Extra	First name	Lastname	Location	Time	Ansee	red Avg Ta	k Access	Skill	Entry Time	Entry Count	1.3	
459	Andrew	Richards	Quoue		0	00.00	Auto	9	Instant	Instant	_	
458	Joanne	Price	Office		0	00:00	Auto	9	Instant	Instant		
453	Grant	Petersen	Gone Out	12:00 pm Today	0	00:00	Auto	None	Never	Never		
476	Andrew	McSeath	Quoue		1	10.51	Auto	9	Instant	Instant		
窗 457	Joanne	Huime	Office	-	0	00:00	Auto	1	Instant	Instant		Queue
@ 414	Duncan	Miler	Office		0	00:00	Q Pickup	1	Instant	Instant		-
413	Greg	Weeks	Office		2	06:52	Auto	9	Instant	Instant		Agents
<b>雷</b> 452	Nataña	Bell	Office		0	00:00	Auto	2	20 Secs	3		
\$\$ 450	Roy	Bates	Office	-	0	00:00	Q Pickup	None	Never	Never		
•												
Queue	Calls											Custo me
Ex	dn Subje	ot	Caler		Status	Queue Time	Ring Time	Tak Tine	Trunk	Type		Calls
<b>b</b> 40	3 Valce 1	fall Support	97736	00	Answered I	0:07	00:00	01:34	uh (	Queue Call		Queuing

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

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

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

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

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

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

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

# Last Agent to Log out of Queue Notification

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



**Note** Please ensure you do not leave the queue unattended while it is open.

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

# Queue Hold

You can place a call on queue hold. This holds the call within the queue for other agents in the queue to view.

Double click to take the call if required.

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

## **Queue Control**

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

## To open a Queue

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

The shortcut menu will appear:



2. Click Queue Control.

The Queue Control options will appear.

Call Control		<u> </u>	
Queue Control	•		Ogen
Properties	_	00	Forward to Queue
	_	۲	Forward to Message
			Reset

#### Open

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

This will set the queue to manually open.

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

#### **Forward to Queue**

You can forward a queue to another queue.

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

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

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

#### **Forward to Message**

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

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

#### Reset

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

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

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

## **Queue Properties**

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

## To view a Queue's Properties

1. Right-click on the required queue.

The shortcut menu will appear.

2. Click Properties...

The Queue Properties screen will appear:

402 - Project M	anagement Propertie	5	
0-2	Schedules Announceme Queue Information.	ents   Priority/GOS   Al	arms   Notes   Pref Agents   Wildcards   Holidays   Permissions
Details Queue <u>N</u> umber: De <u>s</u> cription: Queue Gr <u>o</u> up: Wrapup Folder:	402 Project Management Default	Ienant 1	Options       Virtual Queue:           Eorce wrapup codes:           Use Password:           Use Qriginal Queue Priorities
Queue Adjustmer Queue/Tim Priority Max		Customer Priority	Extension No Answer Return to Queue after <sup>10</sup> seconds. © Temporary Logout for <sup>10</sup> seconds. © Permanent Logout
			OK Cancel

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

See Also
Queues
What is a Queue?
Viewing Queues
Viewing Queue Agents and Call Flow

Viewing Queue Calls

Queue Pickup

Last Agent to Log out of Queue Notification

Queue Hold

Queue Control

# Dial

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

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

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

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

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

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

or

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

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

## Dial/Making an Outbound Call

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

Hangup

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

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

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

When you hangup the icon reverts to show 'on hook'. 🖀

or

1. Click on the Dial Icon.

The Dial screen will appear:

② Dial		
required for exte	number you want to o mal numbers.	dial. No prefix is
Djal	Dial	⊥ Cancel
	<u>N</u> iai	Cancer

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

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

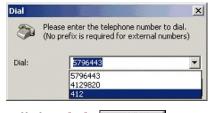
See Also Dial Recently Dialled Numbers Answering a Call Hangup/Completing a Call Transferring a Call Complete Transfer

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

## **Recently Dialled Numbers**

#### To dial a recently dialled number

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



4. Click Dial.

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

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



#### See Also

<u>Dial</u>

Dial/Making an Outbound Call

Answering a Call

Hangup/Completing a Call

Transferring a Call

Complete Transfer

Cancel Transfer

<u>Hold</u>

<u>Resume</u>

Queue Hold

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

## **Answering a Call**

S

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

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

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

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





## Hangup/Completing a Call

#### To hangup/complete a call

• Click on the Hang up button.

6

The call is now terminated.

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

2

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

## **Transferring a Call**

#### To transfer a call

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

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

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

The Transfer screen will display.

@ Transfer		×
Please enter the nu prefix is required for Transfer to	mber you want to tra external numbers.	ensferto. No
	Iransfer	Cancel

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

3. Enter the number and click Transfer.

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

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

your PABX until their conversation is terminated.

See Also

Dial

Dial/Making an Outbound Call

**Recently Dialled Numbers** 

Answering a Call

Hangup/Completing a Call

Complete Transfer

Cancel Transfer

<u>Hold</u>

<u>Resume</u>

Queue Hold

Queue Resume

Hold For

<u>Pickup</u>

<u>Monitor</u>

Intrude

#### **Complete Transfer**

#### **To complete the Transfer**

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

Answer	
<u>D</u> ial	
<u>H</u> ang up	
<u>B</u> lind Transfei	r
Supervised Ti	ransfer
C <u>o</u> mplete Tra	nsfer
C <u>a</u> ncel Transl	fer
Hold	
<u>R</u> esume	
Queue Hold	
Q <u>u</u> eue Resun	ne
Hold <u>F</u> or	
Pickup	
<u>⊂</u> onference	
Monitor	
Intrude	

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

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

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

## **Cancel Transfer**

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

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

## Hold

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

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

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

#### To put a caller On Hold

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

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

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



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

### Resume

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

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

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

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

## Queue Hold

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

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

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

### To put a caller On Queue Hold

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

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

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

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

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

## **Queue Resume**

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

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

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

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

## **Hold For**

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

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

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

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

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

#### To put a caller on Hold For

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

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

2. Select **Hold For** and enter the extension number of the person you wish to place the caller on hold for.

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

#### See Also

Dial

Dial/Making an Outbound Call

**Recently Dialled Numbers** 

Answering a Call

Hangup/Completing a Call

Transferring a Call

Complete Transfer

Cancel Transfer

<u>Hold</u>

<u>Resume</u>

Queue Hold

Queue Resume

<u>Pickup</u>

**Monitor** 

Intrude

## Pickup

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

## To pickup a ringing phone

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

Call	Control -
	<u>D</u> ial
	Answer
	Hang up
	Blind Transfer
	Supervised Transfer
	Complete Transfer
	Cancel Transfer
	Hold
	<u>R</u> esume
	Queue Hold
	Queue Resume
	Hold <u>F</u> or
	Pickup
	Conference
	Monitor
	Intrude

A screen will appear.

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

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

See Also
Dial
Dial/Making an Outbound Call
Recently Dialled Numbers
Answering a Call

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

### Monitor

#### To Monitor the conversation of another party

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

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

The Monitor screen displays.

Please	e enter the extension to	monitor.
Monitor:	312	•
	Monitor	Cancel

2. Enter the extension number and click **Monitor**.

This enables you to monitor the conversation of another party.

The Default settings for this feature are:

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

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

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

#### See Also

Dial

Dial/Making an Outbound Call

**Recently Dialled Numbers** 

Answering a Call

Hangup/Completing a Call

Transferring a Call

Complete Transfer

Cancel Transfer

<u>Hold</u>

<u>Resume</u>

Queue Hold

Queue Resume

Hold For

<u>Pickup</u>

Intrude

#### Intrude

Note This feature requires IPFX Administrator privileges.

#### To Intrude on a call

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

<u>A</u> nswer
<u>D</u> ial
<u>H</u> ang up
<u>B</u> lind Transfer
Supervised Transfer
Complete Transfer
C <u>a</u> ncel Transfer
Hold
<u>R</u> esume
<u>Q</u> ueue Hold
Q <u>u</u> eue Resume
Hold <u>F</u> or
Pickup
<u>C</u> onference
Monitor
Intrude

The Intrude screen displays.

Intrude		×
Please enter	r the extension to	Intrude.
Intrude: 418	8	•
	Intrude	Cancel

2. Enter the extension number and click Intrude.

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

The Default settings for this feature are:

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

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

Tip for the IPFX Director platform only: If you wish to speak privately

with a supervisor who has silently intruded on your call, press \*3 on your phone's keypad to place the outside caller on Hold. Press \*3 again to take the outside caller off Hold.

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

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

Warning!

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

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

See Also

<u>Dial</u>

Dial/Making an Outbound Call

Recently Dialled Numbers

Answering a Call

Hangup/Completing a Call

**Transferring a Call** 

**Complete Transfer** 

Cancel Transfer

<u>Hold</u>

**Resume** 

Queue Hold

Queue Resume

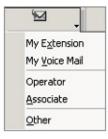
Hold For

<u>Pickup</u>

## <u>Monitor</u>

## Send to Voicemail

Click on the Send to Voicemail icon to display the drop-down menu.



If a call is ringing at your extension, you can select/highlight the call and click on the Send to Voicemail Icon. The caller will now be sent to voicemail and will listen to your greeting.

If a caller is showing as 'In Voicemail', select/highlight the call, then click on the Icon 'My Extension'. This will retrieve the call out of your Voicemail and will start ringing on your extension.

**Note:** This will still work even if you have a Location selected. You can also send a call to any other number.

Send a message

### What is "Sending a Message?"

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

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

Sending a voicemail Message is similar to sending a group email, however the message will seem more personal and the interpretation of it will be much more accurate.

See Also	
Send a message	
Sending a Message	

#### Sending a Message

#### To send a message

1. Click on the  $\operatorname{Misend}$  button on the toolbar.

The Send a New Message screen will appear:

Voicema	il Message 🛛 🤇	) SMS Message	(	🖲 Em	ail	
o						
xtensions:			_	Distrit	oution Gro	
Extn	First Name 🕢		4	8	Group	Description
451	Aaron	Beveridge			000	ALL
476	Andrew	McBeath			001	Service
418	Angie	Wilson			002	Development - VB
419	Anna	Riley			003	Development - C++
499	Auckland	Service Fax				
454	Craig	Carr				
474	Damian	Coventry				
482	Danielle	Drylie				
463	Demo	SoftPhone				
461	Demo	One				
413	Development	Testing				
481	Edward	Moore				
487	Enrico	de Klerk				
410	Grant	Fisher				
478	Irek	Timergazi				
416	Jason	Cullum				
417	Jason C	Softphone				
458	Joanne	Price				
457	Joanne	Hulme				
420	Keren	Schade				
472	Kevin	Plumpton				
471	Kevin	PlumptonSoftphone				
488	Mark	van Dijk	-	8		
		•				

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

#### To send a Voicemail message

Select the Voicemail Message checkbox.

#### **Extensions / Distribution Groups**

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

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

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

#### Subject

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

#### When

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

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

#### Options

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

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

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

#### Controls

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



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

and listen to the message before you send it.

Play

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

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



To send the message, click on the Send button.

Send

#### To Send an SMS Message

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

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

#### **To Send an Email**

Same as SMS, but for Email.

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

See Also

Send a message

What is "Sending a Message?"

## Record

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

#### What is Record?

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

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

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

See Also

Record

Recording Criteria

Recording a Conversation

Stop Recording a Conversation

## **Recording Criteria**

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

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

#### **Recording a Conversation**

#### To record a conversation

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



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

(red)

See Also

Record

What is Record?

Recording Criteria

Stop Recording a Conversation

#### **Stop Recording a Conversation**

#### To stop recording a conversation

1. Click the **Recording** icon.

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

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

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

See Also
Record
What is Record?
Recording Criteria

**Recording a Conversation** 

## Work Time

#### What is Work Time?

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

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

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

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

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

#### **Adding Work Time**

#### **To Add Work Time**

1. Click the Work Time icon on the toolbar.



A drop-down box will appear.

Clear work time
Add 3 <u>0</u> 5econds
Add <u>1</u> Minute
Add <u>2</u> Minutes
Add <u>3</u> Minutes
Add <u>4</u> Minutes
Add <u>5</u> Minutes
Custom work time

2. Click the Work Time required.

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



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

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

Work time until 11:36 am Today

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

#### See Also

Work Time

What is Work Time?

Custom Work Time

Clear Work Time

Setting default Work Time

#### **Custom Work Time**

#### **To set Custom Work Time**

1. Click the Work Time icon on the toolbar.



A drop-down box will appear:

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

2. Click Custom work time.

The Custom Work time dialog will appear:

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

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

Your location will change to show work time.



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

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

Work time until 11:36 am Today

See Also

Work Time

What is Work Time?

Adding Work Time

Clear Work Time

Setting default Work Time

#### **Clear Work Time**

#### **To Clear your Work Time**

1. Click the **Work Time** icon on the toolbar.



A drop-down box will appear.

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

#### 2. Click Clear work time.

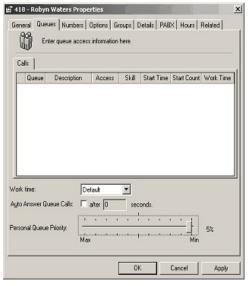
Your Location will change back to your previous setting.

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

#### Setting default Work Time

#### To set default Work Time

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



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

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

#### See Also

Work Time

What is Work Time?

Adding Work Time

**Custom Work Time** 

**Clear Work Time** 

# Configuration

**Note** This feature only available if an IPFX Administrator or IPFX Supervisor Agent license is purchased. For instructions to use this feature, please refer the separate IPFX Administrator Guide.

# Reports

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

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

# **Display Screen**

IPFX Live Toolbar allows up to 20-Character Display Options.

The examples below refer to the IPFX Wallboard (Hardware) character limitations.

**Note** The model numbers reflect the character length of the board, i.e. 210BHR = 10 character; 215BHR = 15 character, etc

Examples of 10-Character Display Options are shown below:

@ 🏂 🍉 🚫 5718 100%04

Queue number, GOS & Agents logged in

🛞 🏂 🍉 🚫 5718 100%

Queue number & GOS

🛞 🎯 🚫 5718 Call00

Queue number & Calls Waiting

🐼 🏂 🏹 🚫 5718 🏼 Agnt00

Queue number & Agents logged in

중 2 2 5718 C00∆00

Queue number, Calls waiting & Agents logged in

🛞 🎒 🍉 🚫 00 : 00 : 00

Longest Call Waiting

Examples of 15-Character Display Options are shown below:

ga 🚰 📷 📢 5718100%00:00:00

Queue number, GOS & Longest call waiting

፼ 🎯 🚱 📢 5718 00 00:00:00

Queue number, Calls Waiting & Longest call waiting

🛞 🎯 🔯 5718 100% CSR=00

Queue number, GOS & Agents logged in

An Example of 20-Character Display Options is shown below:

፼ 월 ፼ 🐼 5718 100% 02 00:00:0

Queue number, GOS, Agents logged in & Longest call waiting

# **Properties**

To configure the IPFX Wallboard (Hardware), you will need to right-click within the IPFX Live Toolbar and select Options to open the IPFX Live Toolbar Properties screen.

#### **General Tab**

🗃 IPFX Live Toolbar Properties 🛛 🛛 🔀			
General Queues Templates			
IPFX Live Toolbar Board Setup.			
<u>Display LED Box</u> Enable LED Board Com <u>P</u> ort: Settings: Board Type: Max ⊆haracters:	Always On Top Com 1 9600,n,8,1 Single Line Red (Chipset BC) 20		
Manual Message:	Send		
	OK Cancel		

#### This Feature Does This

Display LED Box	By clicking in the checkbox, this will enable the Wallboard component of the Toolbar to display on your PC Client.
Enable LED Board	By clicking in the checkbox, this will enable all data to be sent to a Call and Contact Centre wallboard. For the purposes of the IPFX Live Toolbar, this should not be checked.
Com Port	A Call and Contact Centre IPFX Live Toolbar would be connected to a computer via their Com Port. This setting would be changed to reflect which Com Port the IPFX Live Toolbar is attached to. This setting is not required for the IPFX Live Toolbar.
Settings	A com port can be configured with different settings based on the requirements of the Wallboard. Default settings are: 9600,n,8,1. This setting is not required for the IPFX Live Toolbar.
Board Type	If a Call and Contact Centre IPFX Live Toolbar is being used, the Board Type should be changed to reflect the correct IPFX Live Toolbar. This setting is not required for the IPFX Live Toolbar.
Max Characters	This is the maximum number of characters that can be sent to the Wallboard. Please note that this will be dependant on the number of characters that is supported on your physical Wallboard.

Always on Top	This enables the Live Toolbar to display on top of all other windows.	
Manual Message	A 20-digit manual message can be typed and sent to the IPFX Contact Centre IPFX Live Toolbar. This will stay on the wallboard for the length of the Transition time sent. The message will only be shown once. To send again, click on the Send button.	
	Note The message will only be shown on the local IPFX Live Toolbar.	
Send	Enables you to send the Manual Message above to the Wallboard display.	
See Also		

Properties

Queues Tab

Templates Tab

#### **Queues Tab**

📽 IPFX Live Toolbar Propert	ties 🛛 🔀	
General Queues Templates		
Queues to display.		
Select the gueues to display.		
✓ 300 - Operator Queue		
✓ 401 - Support Queue		
Beep On Queue <u>W</u> arning: 🦳		
Beep On Queue <u>A</u> lert: 🕅		
	OK Cancel	

All queues that are set up on the CT Server can be selected to show on the IPFX Live Toolbar. To select a queue, click in the checkbox next to the queue name/number. To clear a queue from the display, click in the checkbox to clear the 'tick'.

This Feature	Does This		
Beep on Queue Warning	Queue Warning alarms are set within the Queue Properties. By clicking on the checkbox, the PC will beep when the queues reach the time/quantity set.		
Beep on Queue Alert alarms are set within the Queue Properties. By clicking on the checkbox, the PC will beep when the queues reach the time/quantity set.			
See Also			
Properties			
<u>General Tab</u>			
Templates Tab			

#### **Templates Tab**

FIPFX Live Toolbar Properties	
General Queues Templates	
Queue information to display.	
Active Templates:	
✓ Template 1	New
	Edit
	Delete
	Move Up
	Move D <u>o</u> wn
Template transition time:	
5 seconds	
ОК	Cancel

#### In This Section

Adding a New Template

Editing a Template Field

Deleting a Template Field

Deleting a Template

Changing the Order of the Templates

Changing the Transition Time of the Templates

See	Also

Properties

General Tab

Queues Tab

#### Adding a New Template

• Click on the **New** button.

You will need to enter a name for the template. This should help you distinguish it from other templates.

New Template	×
Enter a name for this template.	OK Cancel
New Template	

• Click OK.

1

• The Template form will appear.

ſem	plate	e Tot	al Ca	all Co	unt					-			1						2
x	x	x	x	х	x	x	x	x	x										
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
	nsert I	ield	]											(	ЭK		(	Cance	sl

Click on Insert Field

A drop-down box will appear with the Display Fields available, i.e.

Insert Field
(Text)
Abandon Count
Agents Logged In
Answer Count
Calls Queueing
Grade Of Service
Longest Queue Time
Queue Description
Queue Number

This Field	Does This
(Text)	This allows you to add your own text or spaces.
Abandoned Count	Abandoned Count is the quantity of calls that have abandoned the queue before they are answered.
Agents Logged In	Quantity of agents logged into the queue.
Answer Count	Quantity of calls answered for the day.
Calls Queuing	Quantity of calls waiting in the queue to be answered.
	The Grade of Service (GOS) allows IPFX Contact Centre

Grade of Service	managers to view real time, productivity and efficiency of their queues.
Longest Queue Time	The length in seconds of the call that has been waiting in the queue the longest.
Queue Description	Name of Queue as set up by the IPFX Administrator.
Queue Number	Number of Queue as initially set up by the IPFX Administrator.

**Note** The Template cannot be customised for each queue. However, multiple templates can be set up to show more information for each queue.

 Select the field required. The Template will insert the field and required spaces.

Tem	plate	e Tol	tal Ca	all Co	unt		5		38						in the second				×
	U	U	U	v															
lo.	<u>n</u>	n,	0	-															
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
	nsert l	field												(	ЭK		(	Cance	1

To add a space between the Fields, click on the Text option.

• Click OK.



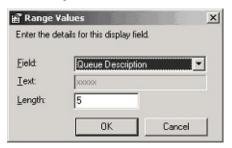
#### **Editing a Template Field**

#### From the Properties Screen/Templates Tab -

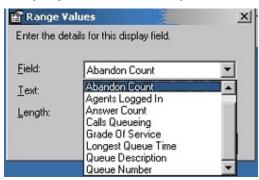
- 1. Select your required template.
- 2. Click Edit
- 3. The Template screen displays.



- 4. Right click on the field you want to change and select from the dropdown menu. i.e. Insert, Edit, Delete or Clear All
- 5. When you select Insert or Edit, the Range Values form will appear.



6. Display the Field drop-down menu as shown in the screen below.



7. If the chosen field is 'Text', enter your requirements in the 'Text' field as shown in the screen below.

🖀 Range V	alues 🔀
Enter the de	ails for this display field.
<b>F</b> . 14	
<u>F</u> ield:	(Text)
<u>T</u> ext:	xxxxx
Length:	5
	OK Cancel

8. Change the length to suit your requirements as shown in the screen below.

Enter the de	alues tails for this display field.	×
<u>F</u> ield:	Queue Number	•
<u>T</u> ext:	XXXXX	
Length:	I	
	ОК	Cancel

- 9. Click OK.
- 10. The Template will now reflect the new length.

Tem	plate	e Tol	al Ca	all Co	unt		10000			2.22			12			102	8		×
X	X	X	Х	5	X	X		9	10		10	12	14	15	16	17	18	19	20
_	4	2	_*	3	0		0	9	10		14	15	14	15	10	11	10	15	20
[] In	sert ]	Field	1											0	)K		(	ance	1

11. Click **OK** to complete the Template,

# See Also Templates Tab Adding a New Template Deleting a Template Field Deleting a Template Changing the Order of the Templates Changing the Transition Time of the Templates

#### Deleting a Template Field

To delete a field from the template, right click on the field and select **Delete.** 

The remaining fields will 'shuffle' across to reflect the deletion.

See Also
Templates Tab
Adding a New Template
Editing a Template Field
Deleting a Template
Changing the Order of the Templates
Changing the Transition Time of the Templates

#### **Deleting a Template**

Select the Template that you want to delete.

Click on the **Delete** button.

You will be prompted to confirm if you want to delete the Template.

Delete Te	mplate		11	E.	×
Q	Are you sure	you want	to delete	Total Call	Count.
	Yes	No		Cancel	]

Click Yes to delete, or No to cancel.

**Note** If the template you deleted was the only Active Template, you will need to select another template by clicking in the checkbox next to the template required.

#### See Also

**Templates Tab** 

Adding a New Template

Editing a Template Field

Deleting a Template Field

Changing the Order of the Templates

Changing the Transition Time of the Templates

#### **Changing the Order of the Templates**

If you are utilising more than one template, you can change the order they display on the IPFX Live Toolbar.

Select the template you want to change and click on the Move Up or Move Down buttons. The template will change accordingly.

See Also
Templates Tab
Adding a New Template
Editing a Template Field
Deleting a Template Field
Deleting a Template
Changing the Transition Time of the Templates

#### **Changing the Transition Time of the Templates**

The templates can be changed to scroll per queue and template at a time specified by you.

1. Click on the drop-down box below Template Transition Time.

IPFX Live Toolbar Properties	
General Queues Templates	
Queue information to display.	
Active Templates:	
✓ Template 1	New
	Edit
	Delete
	Move Up
	Move D <u>o</u> wn
Template transition time: 5 seconds	
ОК	Cancel

- 2. Select the time that you want.
- 3. Click **OK** to complete.
- 4. Each queue and template selected will now scroll at this specified transition time.



Deleting a Template Changing the Order of the Templates

# Insight - Viewing Extension Details and Appointments

**Note:** This feature is only available if the IPFX Productivity Max module has been purchased.

Insight allows a user to divert calls to the IPFX Console Operator or a Call and Contact Centre Agent. When the call diverts through to the agent/operator assigned, the following screen appears, so that the agent can view specific instructions from - and information about - the extension's user.

😻 Insight: E	xtension	412										X
2.	<b>m</b> .			<u>8</u> 2		<u></u>		7	2	5	<b>V</b>	
Location	Dial	Office Extn	Voice Mail	Associate	Mobile	Home/Other	Pager	Hold For	Hold	Record	Release	
Main Use	er Details	Related Sci	nedule									
User:	Masina	Maher				Status:	Office					
From:						Reason:						
Greeting:												
1												
Operator ]	Instructi	ons										
Call Histor	y											
Date		Time				Last Cont	act					
-											_	
										<u>O</u> K	⊆a	ncel

**Example** A staff member is out of the office, and has set up their IPFX voicemail system to allow callers to be diverted to the Operator. A customer calls the staff member's phone, listens to the voicemail greeting and - following the greeting's instructions - presses 0 to speak with the Operator.

When the Operator answers the call, the staff member's Insight screen appears on the console. The Operator can immediately see any Operator

Instructions left by the staff member. With this information the Operator is better equipped to deal with the customer's call.

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

#### Functionality from the top toolbar

- The Location can be changed from this point.
- Full Call Control is available (see Call Control (see "Call Control" on page 1)).
- Calls can be sent to:
  - The User's Office Extension/Associate.
  - Mobile.
  - Home or Other Number Listed.
  - Pager Number.
- A call can be put on 'Hold'.
- A call can be put on 'Hold For' another extension.
- A call can be Recorded into the voicemail of the Users extension.
- You can release the call you have on line.

### Viewing Main Tab of Insight

#### **Functionality within the Main Tab:**

😻 Insight: E	xtensior	n 412										×
2.	2.			<u>8</u> 2		<u></u>		7	7	5	1	
Location	Dial	Office Extn	Voice Mail	Associate	Mobile	Home/Other	Pager	Hold For	Hold	Record	Release	
Main Use	er Details	Related Sch	nedule									
User: From: Greeting:	Masina	Maher				Status: Reason:	Office					
												—
Operator ]	Instructi	ons										—
Call Histor	r <b>y</b>											
Date	•	Time				Last Cont	act					
										OK		ncel

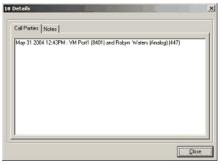
#### **Note** Above is an example of the IPFX Insight screen.

This Feature	Does This
User	Name of the User who has forwarded the calls.
From	CLI of the Caller.
Status	What Location the user is in.
Reason	Reason for the Call.
Greeting	If the user would like you to answer the phone in a specific manner, they can write the script here. This is an IPFX for NEC feature only.
LCD	Send an LCD Display message to a user's phone. This is an IPFX for NEC feature only.
Chat	Enables you to chat with the extension. This is an IPFX for NEC feature only.
Clear	Clears all LCD Message sent. This is an IPFX for NEC feature only.
Operator Instructions	This displays any operator instructions the user has left for you.
	This displays the history of the caller (both internal and external), eg: Customer A

has called in three times over the last week.

This feature will also display any Call flow and/or notes from extensions within the company for each call if you place your cursor over the \_\_\_\_\_. This will display the details screen as shown below.

Call History



This is only visible when on a live call.

#### See Also

Insight - Viewing Extension Details and Appointments

Viewing User Tab of Insight

Viewing Related Tab of Insight

Viewing Schedule Tab of Insight

#### **Viewing User Tab of Insight**

#### **Functionality within the User Tab**

	<b>B</b> . <b>I</b>	1				٩					1	
cation Di	al Offic	e Extn	Voice Mail	Associate	Mobile	Home/Other	Pager	Hold For	Hold	Record	Release	
Main User De	etails Relat	ed   Sc	hedule									
Miscellaneou	s Informati	on:										
De	escription		12				Value					1
Description			Building (	ne								
Car Registration	n			0.0								
Access No												
Building Level												
lotes:												
	Product	and Tra	aining Direct	or								
Position	Product		-	of C								
Position Department: Begion		antation	-	Dr								
Position: Department:	Docume	antation	-	or								

#### This Feature

#### **Does This**

Miscellaneous Information	Shows miscellaneous information from the Details tab of the user's Properties screen.
Notes	Shows information from the Notes field of the Details tab of the user's Properties screen.
Position	User's Position.
Department	User's Department.
Region	Region where the User is located.

#### See Also

Insight - Viewing Extension Details and Appointments

Viewing Main Tab of Insight

Viewing Related Tab of Insight

Viewing Schedule Tab of Insight

#### **Viewing Related Tab of Insight**

#### Functionality within the Related Tab

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

#### To transfer a call in Insight

- 1. Select Dial button for Call Control.
- 2. Select Blind or Supervised Transfer depending on your requirements.
- 3. To Cancel the transfer, select Call Control and Cancel.

#### or

- 1. Double Click on the Related Extension/Contact to transfer the call.
- 2. Select Release.

Insight					
ation Dial Office	Inthe Voice Mail Associate	Mobile Home/Other	and the second		Release
Hain User Details Related	Schedule				
Name		Rek	stionship		
418 - Robyn Waters	Documentation				
8 419 - Spare Extn	Training				
451 - Aaron Beveridge	Finance				
457 - Joanne Hulme	Projects				
elated Contacts:					
Contact		Re	lationship		
				<u>O</u> K	Cancel

#### **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

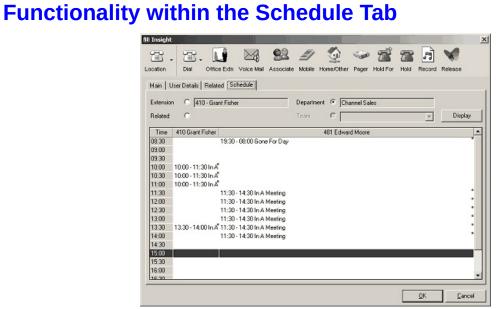
Insight - Viewing Extension Details and Appointments

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

Viewing User Tab of Insight

Viewing Schedule Tab of Insight

#### **Viewing Schedule Tab of Insight**



This Feature	Does This
Extension	Displays scheduled appointments for the selected extension
Related	Displays scheduled appointments for the selected extension and related extensions.
Department	Displays scheduled appointments for all extensions in the selected extension's department.
Team	Displays scheduled appointments for the selected extension's team.
Display	Refreshes the display view of the Appointments.
•	If you place your cursor over this red dot, the contacts appointment details will display.

# **Note** If your appointment does not have a 'key word' specified, the appointment will not display in the Schedule Tab.

#### See Also

Insight - Viewing Extension Details and Appointments

Viewing Main Tab of Insight

Viewing User Tab of Insight

Viewing Related Tab of

Insight

# **Suppressing Voice Capture**

#### 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.

DIR

#### 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.

#### See Also

Using The IPFX Live Toolbar

**Using locations** 

Directory

<u>Queues</u>

<u>Dial</u>

Send to Voicemail

Send a message

Record

Work Time

**Configuration** 

**Reports** 

**Display Screen** 

**Properties** 

Insight - Viewing Extension Details and Appointments