IPFX for Lotus Notes

Product version 4.3 SP4



Introduction

IPFX for Lotus Notes is a powerful, easy to use configuration utility, designed to allow you to operate all facets of your personal voicemail mailbox mailbox and Call and Contact Centre facilities from within your email client.

IPFX for Lotus Notes allows you to centralize your communication tools, by merging your email client and voicemail mailbox into one. Listening to your messages is now made easy by placing them into your email client's In Box. This allows you to double-click on a voicemail message to hear it either via your multimedia speakers on your PC or via your telephone.

IPFX for Lotus Notes allows you to view your location and other internal extensions, including Call and Contact Centre queues and agents (if these are applicable).

Before you use IPFX for Lotus Notes, you need to set up your personal voicemail mailbox. For instruction on how to do this, please see **First Time Set Up Of Voicemail** (see "" on page 6).

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

- **Introduction**
- Getting Help
- **Phone limitations**

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.

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See Also

Introduction

Typographical Conventions

Phone limitations

Phone limitations

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

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

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

• Dialling directly from the Client.

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

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

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

See Also	
Introduction	
Typographical Conventions	
Getting Help	

Before You Begin

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

- 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

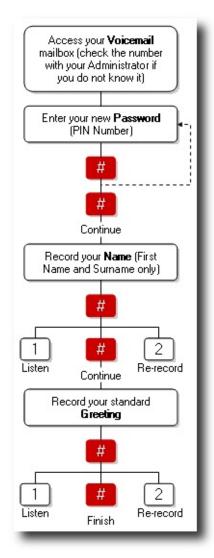
10. Press # to Finish and Hang Up (when satisfied with your greeting)

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



How to Start

Security Warning - Windows XP SP2

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



To use your IPFX product, you must:

- Select Unblock this program.
- Click OK.

See Also

How to Start Password Verification

Password Verification

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

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

Password Verification	×
Please enter an extension number password that is valid.	and
Extension: 418	
Password:	
Save Password	
<u>O</u> K <u>C</u> ancel	

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

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

To change your saved Password:

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

WARNING If you **Save** your password, anyone with access to your computer will be able to open the IPFX product.

See Also

How to Start

Security Warning - Windows XP SP2

Using locations

In This Section

What are locations?

Setting your location in IPFX for Lotus Notes

Returning from a location

Setting another extension's location using the Directory

Setting a location for multiple extensions

Entering Operator Instructions

Editing your Location settings

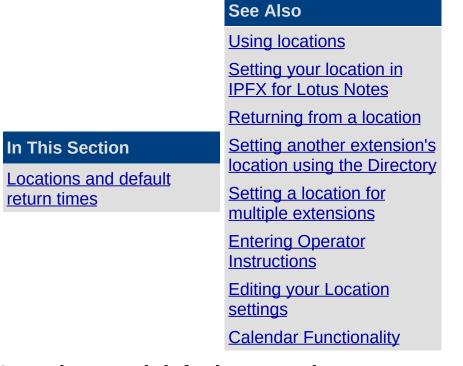
Calendar Functionality

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.



Locations and default return times

Location

Default return time

Break Codes: declaring a

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.

Mage Strength Strengt

1 hour

Do Not Disturb or Prime

Gone Out

6

Gone For Day

 On Leave

Sick Leave

) On A Break

Away On Business

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

1 hour

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.

specific type of break

On some systems, you may be able to set your location to a specific type of break using the **On a Brea**k 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.

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

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



Note: Your IPFX Administrator can add and

edit break codes.

Setting your location in IPFX for Lotus Notes

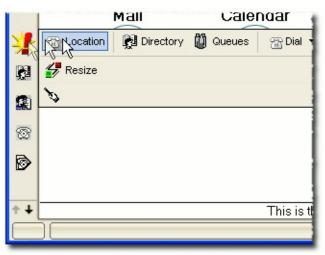
To set or change your location:

- 1. Open the Location screen by either
 - clicking the Location button in the bookmarks sidebar:



or

• opening the IPFX toolbar and clicking the Location button



2. The Location screen for your extension will appear:

Time nknown 2:15 AM]	Mar	ch 2	006					Ap	ril 20	06		•
2:30 AM 2:45 AM :00 AM :15 AM :30 AM :45 AM :00 AM :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
erator Instruc	tions												Cle	ear 💧

- 3. Click on the specific **Location** icon that corresponds to your availability.
- 4. The IPFX system has been set up to recognize the standard working hours of your company or department. It will estimate when you are likely to return to your desk. You can over-ride the default return time by selecting a specific return time from the list at the left of the Location screen. If you will be away for an extended period (for example, on holiday or away on business) select the date of your return from the calendar at the right of the screen.
- 5. Click **OK** to save your new location.

See Also
Using locations
What are locations?
Returning from a location
Setting another extension's location using the Directory
Setting a location for multiple extensions

Entering Operator Instructions Editing your Location settings Calendar Functionality

Returning from a location

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

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

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

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

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

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

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Setting another extension's location using the Directory

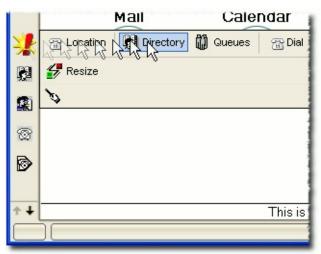
To change any extension's location from the Directory:

- 1. Open the directory by either
 - clicking the **Directory** button in the bookmarks sidebar



or

opening the IPFX toolbar and clicking the **Directory** button



2. The Directory screen will appear:

© ⊟			r <mark>ectory [Tech</mark> n <u>V</u> iew <u>H</u> elp								
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	Extensi	Title	First Name	Last Name	Depar	tmen	t	Location	Re	eturn Time	Region
8	0		Operator	Operator			1	Office			Local
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	301	Ms	Fayola	Lawal			1	Office			Local
7	302	Ms	Aynslie	Gill			1	Away On Busir	ie 08:30	am Sunday,	: Local
ġ.	303	Mr	Chu	Sau-Tung				On A Break	08:00	pm Today	Local
8	304	Ms	Tayanita	Creek			1	Office			Local
77 77	305	Mr	Koorong	Jones			Set L	ocation N			Local
8	306	Ms	Noor	Hafeez				-			Local
-	307	Mr	Torometi Tuki	Para			Call C	Iontrol	° •		Local
							Dial <u>A</u>	Associate			
. [Dial N	10 <u>b</u> ile			
•	_	_			_		Dial <u>H</u>	<u>l</u> ome/Other			•
-							Email			_	
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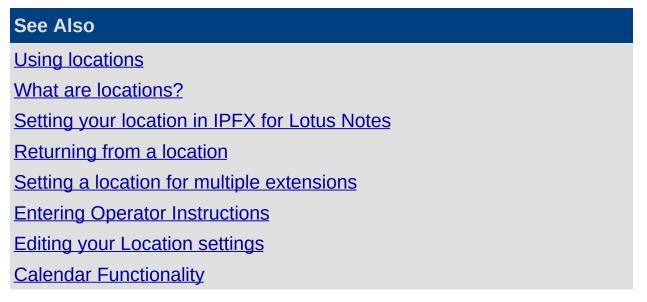
3. Right-click on the extension whose location you want to set and select **Set Location** from the context menu.

The Location screen will appear:

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

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

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



Setting a location for multiple extensions

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

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

	Extensi		Title	Queues 🔹 🔚 First Name	Last Name	Departm		- Location	Return Time	Regio
	0			Operator	Operator		(Office		Local
	301	Ms		Fayola	Lawal			Office		Local
•	302	Ms		Aynslie	Gill		1	Away On Busine	08:30 am Sunday,	, : Local
	303	Mr		Chu	Sau-Tung		(Office		Local
	304	Ms		Tayanita	Creek	Set Loca	ation			Local
	305	Mr		Koorong	Jones					Local
	306	Ms		Noor	Hafeez	Call Con	ntrol	1 P		Local
:	307	Mr		Torometi Tuki	Para	Dial <u>A</u> ss	ociate			Local
						Dial Mob	oile			Ī
	_	_	_		_	Dial <u>H</u> on	ne/Othe	r 🗖		-
						Email				
						Insight				
						Meetme	Confer	ences		
						Chat				
						View Pic	ture			
						🞒 Customi	ice Print	out		

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		×
11:15 AM	<u></u>	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
1:30 AM		27	28	1	2	З	4	5	89					1	2
11:45 AM		6	7	8	9	10	11	12	3	4	5	6	7	8	9
12:00 PM	-	13	14	15	16	17	18	19	10	11	12	13	14	15	16
12:15 PM 12:30 PM		20	21	22	23	24	25	26	17	(18)	19	20	21	22	23
12:30 PM		27	28	29	30	31			24	25	26	27	28	29	30
1:00 PM		1.00							1	2	3	4	5	6	7
1:15 PM	V														
n A Meeting till T)perator Instr		oril 18	, 200)6 at	11:30) AM									ear
															_
															V

- 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.



Setting your location in IPFX for Lotus Notes

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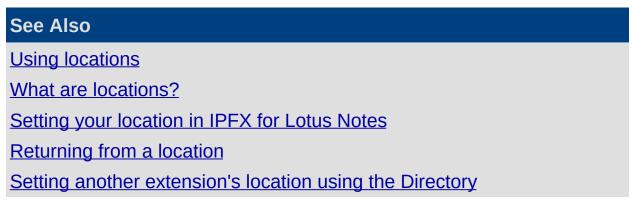
Entering Operator Instructions

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	Mon	Tue	Wed	Thu	Fri	Sat		Mon	Tue	Wed	Thu	Fri	Sat	
8:30 AM 8:45 AM 9:00 AM 9:15 AM 9:30 AM 9:45 AM 10:00 AM 10:15 AM	27 6 13 20 27 ay Apr	28 7 14 21 28 ril 30,	1 8 15 22 29	2 9 16 23 30 6 at 8	3 10 17 24 31	4 11 18 25	5 12 19 26	3 10 17 24 1	4 11 25 2	5 12 19 26 3	6 13 20 27 4	7 14 21 28 5	1 8 15 22 29 6	2 9 16 23 ¶ 7
Operator Instructions													Cle	ear
Meeting VIP clients in Sing	apore	- dire	ect er	quiri	es ab	out t	he K4	5 acco	ount t	o Fay	yola.			<
									9	<u>0</u> K		9	ance	

Click OK.



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Editing your Location settings

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

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

To edit your location settings:

1. Start from your location screen:

Location - 301														
) ⁻ 🍄 🖃 🖀	j-	ł	C	5	Ø	5	2	0	•	H	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
										<u>0</u> K			ance	1

- 3. The Location Settings screen appears:

Diversion After Busy or No Answer Immediately Divert To: Voice Mail		Notifications of New Messages Notifications Normal Messages No Notification No Notification Urgent Messages Same As Normal	
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 C Business Hours C Business Hours C Duzon ✓ Monday ✓ Touesday ✓ Touesday ✓ Touesday ✓ Toursday ✓ Toursday ✓ Toursday ✓ Toursday ✓ Studay ✓ Studay ✓ Studay 	
All Hours	(24 hours a day, 7 days a week)
	8.00am to 5.30pm Monday to Friday
Business Hours	These can be changed to suit your business. You can also select your business hours to adhere to the local time zone or the CTServer timezone, eg: Main Server is in Sydney, but your local time zone is in New Zealand - this affects your location return times.
Custom Hours	Actual days/times you want to be notified.
Server Times	Notification times are based on the CTServer time which will be dependant on your region settings as denoted in the Caution Note. For more information on Server settings, please see your Administrator.
	See Also
	Using locations
	What are locations?
	Setting your location in
	IPFX for Lotus Notes
In This Section	Returning from a location
Prime Time Tab	Setting another extension's
Try Mobile First	location using the Directory

Setting a location for multiple extensions

Entering Operator Instructions

Calendar Functionality

Prime Time Tab

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

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

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

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

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

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

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

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

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

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

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

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

Never tab

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

Urgent tab

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

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

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

Always tab

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



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

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

See Also

Editing your Location settings

Try Mobile First

Try Mobile First

The 'Try Mobile First' feature allows a caller to ring through to a mobile number before going to internal voicemail (or another diversion option).

How to Enable 'Try Mobile First'

- 1. Ensure your mobile number is set in your extension properties screen.
- 2. Open the Presence settings screen that corresponds to the presence state for which you wish to enable Try Mobile First..
- 3. Click in the **Try Mobile First** box.

Note: You must check the **Try Mobile First** box for each Location you require this feature to operate.

4. Click in the **Ask Caller Name** box if you wish the caller to be asked to record their name.

When **Try Mobile First** is selected, the system will ring the mobile number via a supervised transfer. The caller will hear the announcement "Please hold while I transfer your call".

- If the mobile is answered, the mobile user can choose to accept or decline the call:
- "To accept this call press the # (hash) key now. Otherwise please hang-up now".
- If # is pressed, the system completes the transfer and connects the caller.
- If # is not pressed, or the mobile is not answered, the system cancels the transfer and follows the 'Divert To' option set under the 'Diversion' section within Locations Settings.
- If the Ask Caller Name option is set, the caller will be asked "May I say who is calling please?"
- The system will then advise the caller to hold while it attempts the mobile number.
- In this case, on answering the call the mobile user will be told "This is a call from [caller's name].

 To accept this call press the # key now. Otherwise please hang-up now".

Try Mobile First works in the following situations:

- When the user is in a Location which has the Try Mobile First option set.
- When an Operator transfers a call to an extension which has the Try Mobile First option set.

Try Mobile First will not work in the following situations:

- When the extension's owner uses the PC client's Send to Voicemail function to divert the incoming call to voicemail.
- When an Operator transfers a call to a user's Voicemail, via the Console Client.
- When an Operator sends a Voicemail to a user, via the Console Client.

See Also

Editing your Location settings

Prime Time Tab

Calendar Functionality

Your Voicemail Locations function is linked to your Lotus Notes Calendar.

You can enter appointments into your Calendar and your voicemail will automatically set your Location Profile at the time of the appointment.

This Process will identify key words that can be used in either your appointment "subject" or "location" fields.

If you enter any of the following Key Words in either the 'subject' or 'location' fields, your location will be automatically set.

- "Meeting"
- "Prime Time"
- "Gone out"
- "Gone for Day"
- "On Holiday"
- "Sick"
- "On a break"
- "Away on business"

Note: These key words are NOT case sensitive.

The Start and End times specified in your appointment setting will also be utilised.

IPFX for Lotus Notes bookmarks

On the side toolbar of your email client is where you will find the IPFX for Lotus Notes Bookmarks, i.e.



- र्याण्यवर्य
- Location
- Extension Bar

IPFX Mail Manager Toolbars

The top toolbar displays your **Phone Control** options and the bottom toolbar display your **Extension Shortcuts** (providing you set these up):

See Also
IPFX for Lotus Notes bookmarks
Directory
Queues
Location
Extension Bar

Directory

By clicking on the **Directory** Bookmark, a new screen will open allowing you to see the location of all extensions at a glance. You can sort each column in ascending or descending order by clicking on the column header.

You can also dial extensions by either double-clicking on the extension or highlighting and clicking the **Dial** button on the toolbar.

See Also	
IPFX for Lotus Notes bookmarks	
IPFX Mail Manager Toolbars	
Queues	
Location	
Extension Bar	

Queues

In a IPFX Contact Centre environment, you can quickly take a look at the queue statistics by clicking on the **Queues** Bookmark. Once the Queue Summary form is open, you can double-click on a particular queue to find more detailed queue information.

Note IPFX Call Centre Express does not show this view to users, only IPFX Supervisor Agents and IPFX Administrators.

See Also

IPFX for Lotus Notes bookmarks

IPFX Mail Manager Toolbars

Directory

Location

Extension Bar

Location

A quick and easy way to change your location

- 1. Click on the Location Bookmark and the Location form will open.
- 2. Click on your location, the time and date you will be returning and click **OK**.

Your location is now set.

See Also	
IPFX for Lotus Notes bookmarks	
IPFX Mail Manager Toolbars	
Directory	
Queues	
Extension Bar	

Extension Bar

Click on the Extension Bar to view your Extension Shortcut Bar.

The Extension Shortcut Bar enables you to select queues or extensions that you view regularly to appear in your Shortcut list without viewing the entire Directory.

See Also
IPFX for Lotus Notes bookmarks
IPFX Mail Manager Toolbars
Directory
Queues
Location

Voicemail Messages

What is Voicemail?

Voicemail is where messages left on your phone are displayed in IPFX for Lotus Notes.

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

See Also		
<u>Voicemail Messages</u>		
Listening to New Messages		
Remote Voicemail Access		

Listening to New Messages

Your Voicemail messages will be delivered to your email client's In Box (only if notification settings are set under Location Settings).

Voicemail messages will be titled "voicemail from..." and the name of the person or a phone number if detected. They will also have one or two speaker icons depending on the type of notification you have chosen.

Double-click on the Voicemail Message to open.

The custom form shown below will open and your message can be played via your multimedia speakers on your PC or via your telephone.

In This Costion	See Also
In This Section	<u>Voicemail Messages</u>
<u>Voicemail Playback</u> Controls	What is Voicemail?
	Remote Voicemail Access

Voicemail Playback Controls

(auto)	Play on Open	The message will immediately start playing when you open your voicemail form.
(auto)	Multimedia	The message will play back through your PC speakers instead of the phone.
	Play	This will Play the currently selected message.
	Pause	This will Pause the message you are currently listening to.
	Stop	This will Stop the message you are currently listening to.
•	Rewind	This will Rewind the message in pre- determined second intervals.
•	Fast Forward	This will Fast Forward the message in pre-determined second intervals.
	Save	This allows you to save the voicemail message as a .wav file.
	Wave	Creates a file that can be played over multimedia. (It can be forward externally, as well)
\$	Forward	Forward a message internally within the Company.
24	Reply	Reply to a message received from someone internally.
3	Phone	Dial the caller who left you a message.
0 <u>0002</u> 0003	Slide Bar	This allows you to select a position to start listening from.
Volarse Level	Adjusted Volume	This will allow you to increase the Playback volume of your message. (Note They must also have <clvm> for it to work).</clvm>

See Also

Listening to New Messages

Remote Voicemail Access

In This Section	
	See Also
Saving money by	See AISU
specifying Remote Access	Voicemail Message
numbers	What is Voicemail?
Clearing Voicemail	Listening to New

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

<u>les</u>

?

<u>Messages</u>

Saving money by specifying Remote Access numbers

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

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

To set up Remote Access numbers

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

ocation - 2103	* -		_	- 221	_	_) ,,				C] In Settir
Unknown 12:15 AM 12:30 AM 12:45 AM 1:00 AM 1:15 AM 1:30 AM 1:45 AM 2:00 AM 2:15 AM	◀ 30 6 13 20 27	31 7 14 21 28	1 8 15 22 29	nber 2 9 16 23 30	3 10 17 24	4 11 18 25	5 12 19 26	4 11 18 25 1	5 12 19 26 2	6 13 20	7 14 21 4	1 8 15 22	2 9 16 23 30 6	3 10 17 24 31 7
✓ Indefinite Operator Instructions	Office	•						-		<u>o</u> k	1	(ear A

Click the Location Settings button.

Diversion After Busy or No Answer Immediately Divert To: Voice Mail	Notifications of New Messages Notifications Normal Messages No Notification No Notification Image: No Notification Image: Note in the image
Greetings Greetings Greetings Greetings Greetings Greetings Greetings Greetings	Same As Normal using Preference Settings from the Main Menu. Notification Times Image: All Hours Image: All Hours Image: Business Hours Image: Dustom Image: Business Hours Image: Dustom Hours Image: Business Image:

3. The Location Settings window appears:

Click the **Phone Numbers** button.

4. The Phone Numbers window appears:

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

Click the **Remote Access** button.

5. The Remote Access window appears:

	1	1	-
Number		Auto Login	11
			_
	Remove		
bbA			

Click the **Add** button.

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

Number	Auto	Login	
)998765432	[
Add Rer	iove		

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

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

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

- 1. Call your organisation's backdoor number from a phone that you have set up as a Remote Access number .
- 2. If you hear a ringing tone, *hang up*: you have no new voicemail messages.
- 3. If the call connects immediately, you have new messages. Enter your password (if prompted).
- 4. You now have access to your voicemail messages.

See Also

Remote Voicemail Access Clearing Voicemail Messages when you are Offsite

Clearing Voicemail Messages when you are Offsite

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

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

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

3. The voicemail system will announce your name.

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

The voicemail system will ask you to enter your password.

Enter your password.

4. You now have access to your voicemail messages.

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

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

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

The voicemail system will ask you to enter your password.

Enter your password.

4. You now have access to your voicemail messages.

See Also

Remote Voicemail Access

Saving money by specifying Remote Access numbers

Popup Screen

Alerts

In This Section

Call alerts

Location Notification alerts

Popup Screen Options

See Also

Popup Screen

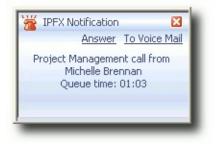
Activating the Popup Call Screen

How to replace a Call Screen with a Call Alert

How to resize your Popup Screen

Call alerts

When **Call Alerts** is checked in the **Popups** tab of your **CTI Options**, the following screen will appear when you receive a call and/or your Location is set to Office or Queue:



If receiving a call, you can do one of two actions:

- Click **Answer** (or pick up the ringing phone) to talk to the caller; or
- Click To Voicemail to send the caller immediately to your Voicemail mailbox.

Note If you do not do either of these actions, the caller will go to Voicemail after the set period

If your Location is set so that incoming calls go immediately to Voicemail, the following screen will appear to let you know a call has arrived and has been sent to Voicemail:

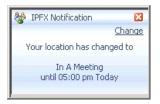


If you wish to talk to the caller, you simply click on **Retrieve** to pull them out of Voicemail.



Location Notification alerts

If you have Location Notification Alerts checked in the Popups tab of your CTI Options, a similar popup screen appears every time your Location changes:



You can click **Change** to alter your Location from this window.

See Also	
<u>Alerts</u>	
Call alerts	
Popup Screen Options	

Popup Screen Options

There are several options available to customize your popup screens. The following covers each Icon from left to right.

This Feature	Does This
Contact	Create a new contact or show you the details of a recognized caller. 1. If you have no calls in the Calls Popup, click on the Contact button to create a new contact The New Contacts screen will appear. Enter the contact details and click OK . The New Contact will reside in your Personal Contacts List. 2. If you have calls in the Calls Popup, click on the Contact button to display the properties of the currently selected Caller (if the Caller is not recognized, the New Contacts screen will appear). Note Options in this section are specific to the Application you are using. For further information please refer to
	Directory Integration.
View	 Allows you to view your- current calls, missed calls, answered calls, and outgoing calls. Maximum setting is 10. Note Changing the view selection also changes the name of the screen, i.e. selecting missed calls, changes the name of the screen to Missed Calls.
Delete	This deletes any calls in your View folder.
Dial	Click on the down arrow at the right of the Dial button to display this dropdown menu. This is the same menu as shown on the top tool bar. You can carry out any of the functions listed from this menu.
My Voicemail	If a call is ringing at your extension, you can select/highlight the call and click on the My Voicemail Icon. The caller will now be sent to voicemail and will listen to your greeting. If a caller is showing as 'In voicemail', select/highlight the call, then click on the Icon 'My Extension'. This will retrieve the call out of your Voicemail and will start ringing on your extension. Note This will still work even if you have a Location selected. You can also send a call to any other number.

	You can listen to a call in voicemail by selecting/highlighting the call and clicking on the icon. You can end it by placing the handset back in the cradle.			
Listen	Note If you wish to listen to a call in Voicemail and then retrieve it, you must hangup your phone before retrieving the call from Voicemail. This is active for NEC and IPFX only.			
	into your voicemail	s you to record your current telephone conversation directly I box where it can be replayed. The Record Icon will be Blue g and will turn Red when recording.		
Record	Note Recording of telephone conversations without consent from all parties involved is ILLEGAL. Please refer to your Privacy Act Laws.			
Work Time	This is used if the Contact Centre module is installed. It allows agents to finish off paperwork etc. before the next queue call is presented to their phone. You can use any of the preset times or select Custom Set Time to set your own time. Displays a drop-down menu of the following:			
	This Feature	Does This		
	Call Information	Allows Caller Information to be displayed in Popup Screen.		
	Call List	Displays a list of calls for your extension.		
	Wrapup Codes	Displays Wrapup Codes for selection when a call is finished (if applicable).		
	Auto Select Wrapup Folder	Displays the wrapup folder for the active call state (ie. outbound, incoming, queue)		
	Notes	Displays a screen to enter any relevant notes.		
	Use Alert Notification	Displays Incoming calls in your 'Toast' Popup.		
	Show on Outbound	Allows Screen to popup when outbound calls are made.		
Options	Show On Incoming	Allows Screen to Popup when a call is Incoming.		
	Show on Wrapup	Show Screen Popup on Wrapup.		
	Hide on Release	Allows Screen to disappear upon hangup.		
	Hide on Wrapup	Allows Screen to disappear upon hangup.		
	Beep on New Call	Incoming call will beep via Multimedia Speakers.		
	Show Queue	Shows the length of time that the call has spent in the		

Time	queue.
Always on Top	Ensures Pop Screen always displays on top of any other open screens.
Show button Captions	Displays captions under the buttons on the Pop Screen Menu Bar.
Large Icons	Resizes the icons on the toolbar.

See Also

<u>Alerts</u>

Call alerts

Location Notification alerts

Activating the Popup Call Screen

Activating the IPFX for Lotus Notes Popup Call Screen allows users to see Caller Identification and also use the Wrapup feature in a Call and Contact Centre environment.

To activate the Popup Call Screen

- 1. Select the **CTI Options** tab in the top toolbar of your email client.
- 2. The IPFX for Lotus Notes Options Screen will appear.
- 3. Tick the checkbox beside the Popup Call Screen to enable it.
- 4. Click OK.

A Pop Screen will display advising you to restart Lotus Notes for changes to take effect.

The Popup screen will now be minimized in your System Tray in the bottom right hand corner of your screen (as your location icon).

Whenever you receive a call, the Popup Call screen will display.

The call displays as a ringing phone (i.e. a red phone) and, when answered, the icon will turn yellow and show 'off hook'.

Information displayed here allows you to see the **Caller ID**, Status of the Call and the duration of the current status.

Note: Caller ID is only shown if enabled on your system. If not, 'Unknown Caller' will be displayed. A name will be displayed if the Caller ID matches an entry that is in your Personal/Company Contacts or is an internal caller.

	See Also	
In This Section	Popup Screen Alerts	
Callers in Voicemail	How to replace a Call	
<u>Open a Popup screen</u>	Screen with a Call Alert How to resize your Popup	
	<u>Screen</u>	

Callers in Voicemail

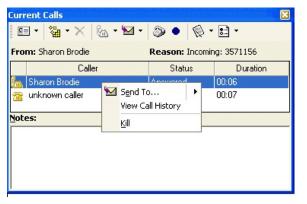
If you are already on a call and a second call appears, you are able to see the Caller ID information (Name/Description will appear if they are in your Contacts).

🗉 • 🖓 • 🗙	🗟 • 🖾 • 🔊	•	:: •
From:	Reason:	Outgoing	
Caller	Status	Duration	
6	Answered	00:06	
쪐 Robyn Waters	In Voice Mail	00:02	

The status of the call will also be shown (i.e. In Voicemail).

To View the Call History of your Caller

1. Right-click on the Caller within your Screen Pop.

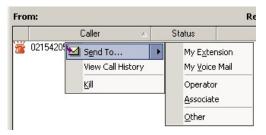


2. Click View Call History to see the Caller History.

Call History	25			
Date	Time		Last Contact	
26 May 2005	10:56	VM Port1 (8401)		۲
26 May 2005	10:54	VM Port1 (8401)		۲
25 May 2005	08:12	VM Port1 (8401)		۲
21 May 2005	13:35	VM Port1 (8401)		۲
17 May 2005	20:21	VM Port1 (8401)		۲
16 May 2005	13:05	VM Port1 (8401)		<u>eeeeee</u>
07 May 2005	12:22	VM Port1 (8401)		۲
07 May 2005	12:19	VM Port1 (8401)		

Note If you place your cursor over the 'i' in the right hand corner of this view call history form, you can view where the Caller has been transferred to and from for this particular call.

If you select **Send To..** the menu shown below displays.



Select where you want to send the call.

See Also

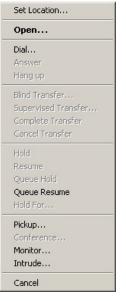
Activating the Popup Call Screen

Open a Popup screen

Open a Popup screen

To Open the popup Screen

- 1. Double-click the Location icon in your Windows System Tray; or
- 2. Right-click on the Popup Screen icon in the System Tray. The following menu will display (this menu is the same as that displayed on the Call Control icon on your Phone Control Toolbar):



You can operate any of the Call Control functions displayed on this menu.

Click **Open** to open the Call Screen.

Note Call Control options are active depending on your phone state.

For information on Call Control functionality, refer to Call Control.

See Also

Activating the Popup Call Screen

Callers in Voicemail

How to replace a Call Screen with a Call Alert

To replace the Call Screen with a Call Alert

- 1. Select the CTI Options Tab (n.b. in IPFX Live Desktop, right-click on the top toolbar and click **Options**).
- 2. Check the **Call Alert** checkbox.

Note When both Popup call screen and Call Alerts boxes are checked, Call Alerts is the default popup screen.

3. Click OK.

The popup call screen will be minimized in your System Tray in the bottom right-hand corner of your screen, and displays as the current Location icon.

See Also	
Popup Screen	
<u>Alerts</u>	
Activating the Popup Call Screen	
How to resize your Popup Screen	

How to resize your Popup Screen

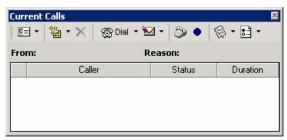
If you wish to change the size of your Popup Screen:

- 1. Place the mouse over the bottom right hand corner of the Popup Screen to enable the resize icon. (The mouse pointer changes to a double pointed arrow).
- 2. Click, hold and drag to the desired size.

If you wish to change the location of your Popup Screen:

• Highlight the title bar and drag to your preferred location.

This is where your Screen Pop will now populate your screen.



Note If your call popup populates your screen and then you open another window in Outlook, e.g. Tools/Options, and then click on email options within the options screen to open a second level window, the call popup will display but you cannot click on items in the call popup while outlook forms are open.

See Also

Popup Screen

<u>Alerts</u>

Activating the Popup Call Screen

How to replace a Call Screen with a Call Alert

Wrapup Codes

Wrapup codes can be used to categorize each call for reporting and business analysis.

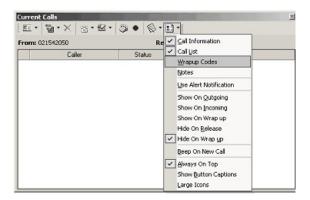
Wrapup codes can be applied to incoming calls, outgoing calls, queue calls, callback, queue emails and queue faxes.

The idea is to select a Wrapup code or codes that best describes the nature of the call.

How to View Wrapup Codes

To view Wrapup codes -

- 1. Click on the **Options** button on the Call Screen screen toolbar.
- 2. Select Wrapup Codes as shown on the screen below.



See Also

Wrapup Codes

How to use Wrapup Codes

Wrapup Folders

How to Use Notes

How to use Wrapup Codes

If you have selected to view Wrap codes, the Call Screen appears with the Wrapup codes panel open as shown in the screen below.

Current Calls			×
	• 🕲 • 🕲	<u></u> .	
То:		Reason: Outgoing	
Caller 🗠	Status	Duration	
14867012	Answered	00:21	
			I
			I
			I
Wrapup codes:			
🖃 💼 System	Code	Description	
Outgoing 03	00 Tran	isferred Calls	
🗄 💼 Queue 📃 03	D1 Mob	ile Calls	
Incoming			
Notes:			
Enter a note here			
·			Analy I
			Apply

You can apply a Wrapup code(s) during or just after a call.

- Check the box or boxes of the codes that most accurately reflect the nature of your call.
- Click Apply.

Supervisors/Administrators can create Wrapup codes.

Supervisors/Administrators can 'force' Wrapup codes at a Queue level or at an Agent level.

When Wrapup codes are 'forced' each agent must select a Wrapup code or codes before the next queue call can be delivered.



Wrapup Folders

To ensure the correct wrapup folders display when an incoming, outgoing or queue call is received you must tick **Auto Select Wrapup Folder** on your popup screen's options menu:



Wrapup folders are visible from the popup screen. The screen below shows the Wrapup folder that corresponds with the call type on the left side of the screen. In this case, it is an Outgoing call so the Outgoing Wrapup folder is automatically showing:

Current Calls			×
🖭 • 🖓 • 🗙 🕼 • 🗠 • 🛛] • 🖉 🌔 🕲	<u>.</u>	
To:		Reason: Outgoing	
Caller 🛆	Status	Duration	
ki 14867012	Answered	00:21	
Wrapup codes:			
🖃 🖳 System	Code	Description	
Outgoing 030	10 Tran	sferred Calls	
📄 🕀 🛄 Queue 👘 🔲 030	11 Mobi	ie Calls	
Incoming			
Notes:			
Enter a note here			
			Apply

Note IPFX Administrator and IPFX Supervisor Agents can allocate Wrapup codes to a relevant Wrapup code folder.

See Also

Wrapup CodesHow to View Wrapup CodesHow to use Wrapup CodesHow to Use Notes

How to Use Notes

If you have **Notes** checked on the Call Screen Options menu, a **Notes** section will display below the Wrapup codes section on the Popup Screen as shown on the screen below.

Current Calls			×
■・ 镭・× 嘘・≌・	۰ 🖉 🕲	<u>.</u>	
To:		Reason: Outgoing	
Caller 🗠	Status	Duration	
14867012	Answered	00:21	
Wrapup codes:			
E 📴 System	Code	Description	
Outgoing 03	00 Tran	nsferred Calls	
	D1 Mob	ile Calls	
Notes:			
Enter a note here			

The screen above is displayed with Wrapup codes and Notes enabled.

- Select the required Code(s), then
- Enter your notes in the Notes section. Notes are where additional information can be entered by the user regarding the current call. They will then be attached to that call and any agent can view these notes by right clicking on the active call to 'View Call History'.
- Click Apply.

Note Do not click Apply until you have completed both sections. The Apply function does not reappear which means you will not be able to complete further information.

See Also

Wrapup Codes

How to View Wrapup Codes

How to use Wrapup Codes

Wrapup Folders

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.

E <u>x</u> tension:	304				
<u>T</u> ype:	Digital Extension	~			
MAC Address:					
	(Title)	(Eirst)	(<u>S</u> ur	name)	
<u>N</u> ame:	Ms Tayanita		Creek		4 E
<u>E</u> mail:	t.creek@example.c	om			
LCD Name:	Tayanita Creek	((Max 16 charact	ers)	
Position:	Marketing Manager				
<u>U</u> ser level:	User		-	0	
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
Setting up your mailbox phone numbers
Properties
Viewing Queue Properties
Groups Tab
Viewing Site Specific Details
PABX Tab
<u>Hours</u>
Related

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.

6	Numbers Options Groups Details	PABX Hours Related
Office Extension: Associate: Mobile Phone: Home or Other: Pager Phone: Pager Type:	2103 +6499876543 None	<u>R</u> emote Access

3. Edit your phone details as required.

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

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

See Also

Changing your extension's properties

Details Button

Properties

Viewing Queue Properties

Groups Tab

Viewing Site Specific Details

PABX Tab

Hours

Related

Properties

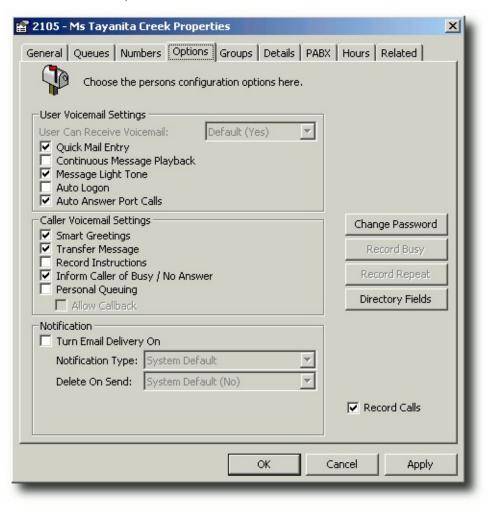
Properties

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

You can set Voicemail and email options here.

How to Set Up your Voicemail mailbox Options

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



User Voicemail Settings

This Feature

Does This

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

Quick Mail Entry	entered their password instead of having to listen to the Main Menu Options: (i.e. 1 to Listen to Messages, 2 to Send a Message, 3 to change Locations etc.). The default setting for this is ON.
	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.
	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.

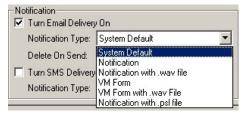
Email

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

Check the Turn Email Delivery On box.

Notification Votification Image: Constraint of the second seco			
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.

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

Change Password

Allows you to change your voicemail mailbox password.

Directory Fields

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



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

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

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

Record Calls

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

See Also

Changing your extension's properties

Details Button

Setting up your mailbox phone numbers

Viewing Queue Properties

Groups Tab

Viewing Site Specific Details

PABX Tab

Hours

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.

_	Image: State of the state								
	Call Queue Description Access Skill Start Time Start Work Time ✓ 401 Support Queue Automative 9 ✓ Instant ✓ Default ✓								
W	ork tim	ne:	De	fault	–				
Auto Answer Queue Calls: after seconds. Personal Queue Priority: Max Min									
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	<u>Properties</u>
Auto Answer Queue Calls	<u>Groups Tab</u>

Personal Queue Priority	<u>Viewing Site Specific</u> <u>Details</u>
	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 Lawal Properties 🛛 🛛 🔀								
General Queues Numbers Options Groups Details PABX Hours Related Image: Comparison of the second								
Call Queue Description Access Skill Start Time Start Work Time								
401 Support Queu				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	econds.	· · ·	0%				
		ок	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

Groups Tab

In This Section

Personal Voicemail

Distribution Groups

Personal Contact Groups

See Also

Changing your extension's properties

Details Button

Setting up your mailbox phone numbers

Properties

Viewing Queue Properties

Viewing Site Specific

<u>Details</u>

PABX Tab

Hours

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 Details PABX Hours Related							
Personal <u>v</u> oice mail distribution							
050 - Management	Create	Play/Record					
	⊆hange	<u>S</u> ave					
	Delete						
Personal contact groups							
	Create						
	Change						
	Delete						
Wildcards							
	Create						
	Change						
	Delete						
1							
ОК	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 Voicemail Distribution Group							
General							
Personal Voicemail 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	
Ø	Personal voice mail distribution groups. Image Delete Play/Record	
R	Personal contact groups. test grp <u>Cr</u> eate <u>Change</u> <u>Delete</u>	_
•	Wildcards New Plymouth Customers Test ((Create Change Delete	_
-	OK Cancel Apply	

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

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

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 contact information here.								
Address <u>b</u> ook:	Address book: Personal Contacts							
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	xtensions Wildca	ards		
		Personal C	Contact	
home (479 1				
√endyTest	(579 6443)			
				<u>G</u> reate <u>S</u> el
		Company (Contact	<u>Greate</u> Sel
		Company (Contact	
		Company (Contact	<u>Greate</u> Sel
		Company (Contact	<u>C</u> reate <u>S</u> el

Adding Extensions to your Contact Group

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

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

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

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

III Select Extensions		
General Select Extensions	<u>S</u> elected:	_
0 - Operator Operator 410 - Grant Fisher 411 - Tony Hartigan 412 - Masina Maher 413 - Tony test2 414 - Mark Walker 450 - Roy Bates 451 - Neil Gibson 452 - Natalia Bell 453 - Grant Petersen 454 - Craig Carr 456 - Sharon Brodie 457 - Joanne Hulme 458 - Joanne Price 459 - Andrew Richards 472 - Kevin Plumpton	 415 - 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	up Wildcard Properties	×
General		
Conta	ct Group Wildcard Details	
<u>E</u> xtension:	456	
Description:	New Plymouth Customers	
<u>W</u> ildcard:	06*	
	ОК	Cancel

• Click OK.

To Add an existing Wildcard to your Group

Click the Wildcards Tab from the Contact Group Properties screen.

• Click the **Select** button.

The Select Wildcards screen displays.

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

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

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

See Also

Groups Tab

Personal Voicemail Distribution Groups

Viewing Site Specific Details

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

do fue for	s Groups Details PABX Hours Related
eneral Queues Numbers Uption	s Groups Details PABX Hours Helated
Miscellaneous Information	L
Description	Value
Access No	
Birthday	
Building Location	
Car Registration	
	Add Doloto Critoria
Notes:	Add Delete Criteria
<u>I</u> otes:	Add Delete Criteria
<u>v</u> otes:	Add Delete Criteria
<u>d</u> otes:	Add Delete Criteria
Lotes:	Add Delete Criteria
<u>d</u> otes:	Add Delete Criteria

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

Setting up your mailbox phone numbers

Properties

Viewing Queue 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
eneral Queues Num	bers Options Groups Details PABX Hours Related
Enter phone	information here.
DDI:	
Outbound CLID Type:	DDI
Outbound CLID:	
Forward	R <u>e</u> boot 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.

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

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

See Also

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

Setting up your mailbox phone numbers

Properties

Viewing Queue Properties

<u>Groups Tab</u>

Viewing Site Specific Details

<u>Hours</u>

Related

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	305 - Mr Koorong Jones Properties								
General Queues Numbe	Seneral Queues Numbers Options Groups Details PABX Hours Related								
Extension-specifi	c Business Hou	rs							
Use setting from:	Company	•							
<u>S</u> tart Time:	08:30:00	-							
End Time:	17:30:00	-							
		ОК	Cancel	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 Setting up your mailbox phone numbers Properties Viewing Queue Properties Groups Tab Viewing Site Specific Details PABX Tab Related

Related

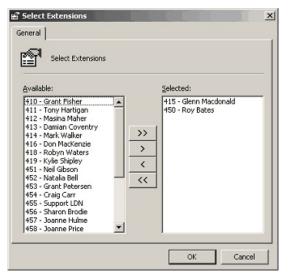
The Related Tab enables a user to detail any internal or external contacts that they wish to use for reference if they are not available to take a call.

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.

Relationship

Related Extensions

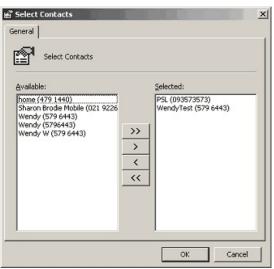
Click the **Select** button to display the **Select Extensions** screen.



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
Setting up your mailbox phone numbers
Properties 100
Viewing Queue Properties
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	§ :∀́:						}	٦	•			9		
Inknown 2:15 AM]												F
2:30 AM 2:45 AM :00 AM :15 AM :30 AM :45 AM 2:00 AM 2:15 AM	27 6 13 20 27	28 7 14 21 28	1 8 15 22 29	2 9 16 23 30	3 10 17 24 31	4 11 18 25	5 12 19 26	3 10 17 24 1	4 11 18 25 2	5 19 26 3	6 13 20 27 4	7 14 21 28 5	1 8 15 22 29 6	2 9 16 23 30 7
fice perator Instruc	tions												Cle	ear
														~

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

Profiles							
Description	Priority	Contact G	roups <u>S</u> etting	IS			
Primetime Never	6	Setting	s		-Relevant Lo	ations	
Primetime Urgent	7	1000	Location Greeting		Office		
Primetime Always	8		Caller Profile Greeting	Deserved	🗌 In A Meetin	ng	
Customers	7				Prime Time		
General business	3		onal Queue Greeting		Gone Out		
Family	9	(Only	y applies to Office loc	ation)	Gone For D		
Managers Profile 👘	0				On Holiday		
		Norm	al Notification		On A Break	c .	
		C Urger	nt Notification		Away On B		
		Priority	7		u b bu re		
			,		Validity Time		
		Caller T	ransfer Keys		C All Hours	Business Ho	urs 🔿 Custom
		Key O	Operator	225	Day	Start	End
		Key 1	No Transfer	-	Monday 👻	08:30 🗸	17:30 👻
					Tuesday 💌	08:30 🗸	17:30 👻
		Key 2	No Transfer	-	Wednesda; 🔻	08:30 💌	17:30 💌
		Key 3	No Transfer	-	Thursday 🔻	08:30 🗸	17:30 💌
					Friday 💌	08:30 🗸	17:30 💌
		Key 4	No Transfer	-			
		Default			Add	Remove	1
Add Delete	Copy	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	Settings					
Primetime Never	6	Settings		_	-Relevant L	ocations —		
Primetime Urgent	7	Play Location	Greeting		Office			
Primetime Always	8		ofile Greeting Reco	rd	🗌 In A Mee	ting		
Customers	7	Personal Que	_	Prime Time	10121			
General business	3		ra					
Family	9	(Only applies	to Office location)		Gone For	· · · ·		
Managers Profile	0				Sick Leav			
		Normal Notifi			On A Bre	ak		
		C Urgent Notifi	cation		🗌 Away On	Business		
		Priority 7			- Validity Tin	nes		
		Caller Transfe	r Keys			Business	s Hours C Cus	tom
		Key 0 Opera	tor		Day	Start	End	
		Key 1 No Tr	ansfer 🔻	-	Monday	▼ 08:30	▼ 17:30	-
				-	Tuesday	▼ 08:30	▼ 17:30	•
		Key 2 No Tr	ansfer 🚬	1	Wednesday	▼ 08:30	▼ 17:30	-
		Key 3 No Tr	ansfer 💌	-	Thursday	▼ 08:30	▼ 17:30	-
		Kould No. To		- 1	Friday	▼ 08:30	▼ 17:30	-
		Key 4 No Tr	ansfer					
L		Default Voice	mail	7	Add	Remov	e	
Add Delete	Сору	170000						
					<u>o</u> k		el <u>A</u> p	ply

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.

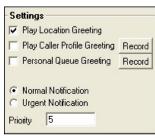
See Also
Call Profiles
Add the Settings/Properties to your Call Profile

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	rofile Setti	ngs				×
Profiles						
Description	Priority	Contact Groups	Settings			
Primetime Never	6	Settings		- Relevant Loc	ations	
Primetime Urgent	7	Play Location Gr	eetina	Office		
Primetime Always	8	Play Caller Profil		🗌 In A Meetin	g	
Customers	7			Prime Time		
General business	3	Personal Queue		Gone Out		
Family	9	(Only applies to	Office location)	Gone For D	ay	
Managers Profile	0			On Holiday		
		Normal Notificati	ion	On A Break		
		C Urgent Notificati	ion	Away On B		
		Priority 7		Validity Time	5	
		Caller Transfer K	eys	C All Hours	Business Hor	urs C Custom
		Key 0 Operator		Day	Start	End
		Key 1 No Trans	fer 💌	Monday 💌	08:30 💌	17:30 💌
				Tuesday 💌	08:30 💌	17:30 💌
		Key 2 No Trans	fer 💌		08:30 💌	17:30 🔻
		Key 3 No Trans	fer 💌			17:30 🔻
				Friday 💌	08:30 💌	17:30 👻
		Key 4 No Trans	fer 💌			
Add Delete	Copy	Default Voicemail	•	Add	Remove	
			[<u>0</u> K	<u>C</u> ancel	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 pre-

recorded 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 T	ransfer 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

Relevant Locations
Office
In A Meeting
✓ Prime Time
Gone Out
Gone For Day
🗌 On Holiday
Sick Leave
🗆 On A Break
Custom

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

Validity Times

Validity Times	C Business Hours	C Custom
Day	Start	End

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

What is the Directory?

The Directory shows all the internal extensions you can view, call, transfer to or hang-up from. 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, department, location 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.

See Also
Directory
Dialing from your Directory Listing
Dialling Other Available Numbers
Conferencing
<u>Chat</u>
Setting a Callback
<u>SMS</u>
Send an Email message from the Directory
Extension Properties
View Extension Images
Customized Printout
Print Preview
Filtering the Directory
Directory Integration

Dialing from your Directory Listing

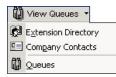
To dial from your Directory Listing

Click on the **Directory** button on the IPFX Phone Control Toolbar.

The Extension Directory will appear:

Ĵ			-w-		Dial ▼ 🖨 🗟 🗄 F∃ S∃	D .		D .	
	Extensi	Title		Last Name	Position	Departme	Location	Return	Region
ł	0		Operator	Operator			Queue		Local
	301	Ms	Fayola	Lawal	CEO		In A Meeting		Local
	302	Ms	Aynslie	Gill	Director, Product Development		Away On Busine	08:30 am	Local
1	303	Mr	Chu	Sau-Tung	Receptionist		Queue		Local
1	304	Ms	Tayanita	Creek	Marketing Manager		Office		Local
1	305	Mr	Koorong	Jones	Financial Director		Office		Local
1	306	Ms	Noor	Hafeez	Quality Assurance		Queue		Local
ŝ.	307	Mr	Torometi Tuki	Para	Support Engineer		Queue		Local

To view other directories, click the View Queues drop-down menu to display and select the required directory view, as shown in the screen below.



 Double-click on the Queue you require to display the details of members of the queue.

Then

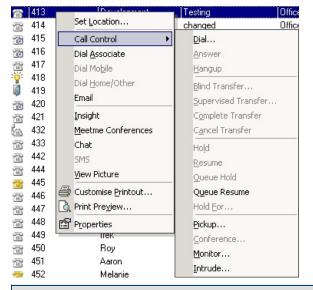
- Double click on the extension you require.
- The application will dial the number and connect the call through your phone.

Or

- Select Call Control.
- Click **Dial**.

The application will dial the number and play the call through your phone.

A short cut menu will appear:



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

See Also

Directory

What is the Directory?

Dialling Other Available Numbers

Conferencing

<u>Chat</u>

Setting a Callback

<u>SMS</u>

Send an Email message from the Directory

Extension Properties

View Extension Images

Customized Printout

Print Preview

Filtering the Directory

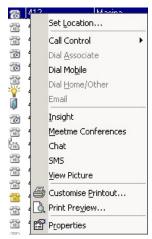
Directory Integration

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 your Directory Listing

<u>Conferencing</u>

<u>Chat</u>

Setting a Callback

<u>SMS</u>

Send an Email message from the Directory

Extension Properties

View Extension Images

Customized Printout

Print Preview Filtering the Directory Directory Integration

Conferencing

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

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

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

To Conference a party into a Conversation

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

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

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

See Also	
Directory	

What is the Directory?

Dialing from your Directory Listing

Dialling Other Available Numbers

<u>Chat</u>

In This Section

Meet Me Conferences

Setting a Callback

<u>SMS</u>

Send an Email message from the Directory

Extension Properties

View Extension Images

Customized Printout

Print Preview

Filtering the Directory

Directory Integration

Meet Me Conferences

PBX Dependent Feature!

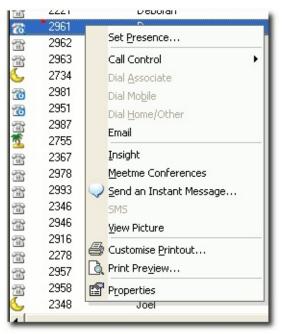


Meet Me Conferences enables you to set up a Conference on a date/time that will either:

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

To Set up a Conference

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



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

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

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

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

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

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

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

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

• This screen appears:

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

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

😻 Meetme Conferences			×
Meetme Conferences for 418	Details Conference ID: 1168 Start Time: 19/05/2005 13	2:00:00	
1155 1168	Email Address:		_
	Password: Password		
	Attendees	Number	Number Trees
	Name To Jude Rhodes	220 221	Number Type Extension Extension
Agd Edit Delete			
			Select
	<u></u> K	Cancel	Apply

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

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

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

See Also

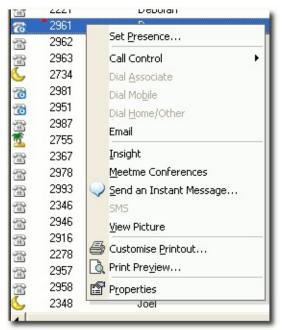
Conferencing

Chat

Chat enables you to chat online with another internal user.

To Chat online

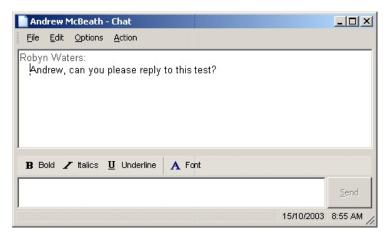
- Click into your Directory from the Main Toolbar.
- Right click on the user you wish to chat with in the Directory listing



Click Chat.

The screen below displays.

Andrew McBeath - Chat	_ 🗆 🗙
Eile Edit Options Action	
B Bold ≠ Italics U Underline A Font	
Andrew, can you please reply to this test?	Send
1	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 your Directory Listing Dialling Other Available Numbers Conferencing Setting a Callback SMS Send an Email message from the Directory Extension Properties View Extension Images Customized Printout Print Preview Filtering the Directory Directory Integration

Setting a Callback

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

To set a callback

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

Callbac	c Confirmation
2	Do you still want to call Sharon Brodie (456)?
	Ves No

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

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

See Also Directory What is the Directory? Dialing from your Directory Listing Dialling Other Available Numbers Conferencing Chat SMS Send an Email message from the Directory Extension Properties View Extension Images Customized Printout Print Preview

Filtering the Directory Directory Integration

SMS

Note To enable SMS messaging, your organization must have an SMS Gateway set up. Please contact your Network Administrator to arrange this.

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

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

See Also

Directory

What is the Directory?

Dialing from your Directory Listing

Dialling Other Available Numbers

Conferencing

<u>Chat</u>

Setting a Callback

Send an Email message from the Directory

Extension Properties

View Extension Images

Customized Printout

Print Preview

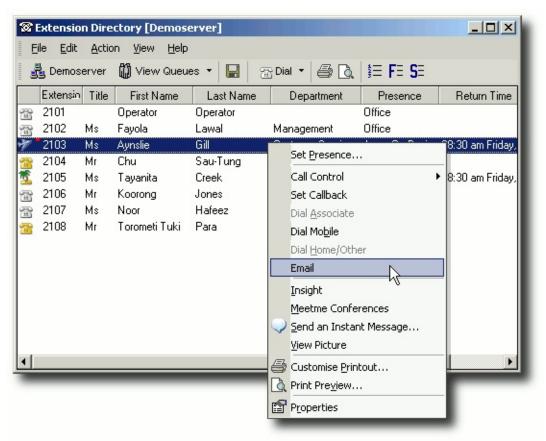
Filtering the Directory Directory Integration

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.



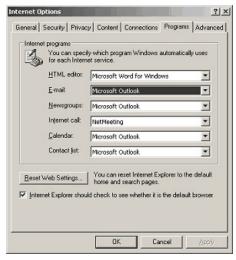
3. Select Email.

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.

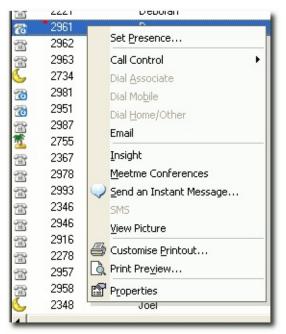
See Also
Directory
What is the Directory?
Dialing from your Directory Listing
Dialling Other Available Numbers
Conferencing
<u>Chat</u>
Setting a Callback
<u>SMS</u>
Extension Properties
View Extension Images
Customized Printout
Print Preview

Filtering the Directory Directory Integration

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 information	n here.			
E <u>x</u> tension:	418	ype:	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	4
<u>E</u> mail:	angie.wilson@per	rform-sol.com	ı		
<u>L</u> CD Name:	Angie Wilson		(Max 16	characters)	
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— <u>U</u> ser level:	Administrator		•	Incl <u>u</u> de in Staff Lis	t Is
Department:	(none)		•	la a	
<u>R</u> egion:	Auckland		•	<u>I</u> mag	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

Directory

What is the Directory?

Dialing from your Directory Listing

Dialling Other Available Numbers

Conferencing

<u>Chat</u>

Setting a Callback

<u>SMS</u>

Send an Email message from the Directory

View Extension Images

Customized Printout

Print Preview

Filtering the Directory

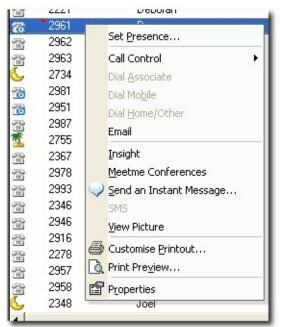
Directory Integration

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

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<u>Chat</u>

Setting a Callback

<u>SMS</u>

Send an Email message from the Directory

Extension Properties

Customized Printout

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Filtering the Directory

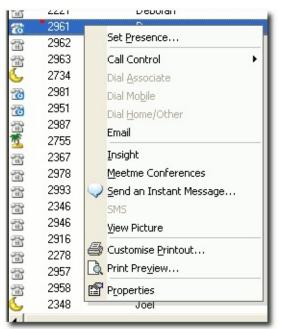
Directory Integration

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		
Fist Name								
Z Last Name								
✓ Department								
Z Location								
Return Time								
✓ Mobile								
Region								
Server	4							
	Extension	First Name	Last Name	Department	Location	Return Time	Mobile	Region.
	0	Operator	Operator		Office			_
	410	Gnant	Fuher	Channel Sales	Office		021757600	Aucklan
	411	Tony	Hartigan	Service	Queue			Aucklane
	412	Matina	Maher	Financial	Office			Auciklan
	413	Danian	Covenity	C++	Office			Aucillan
	414	Mark.	Walker	VB	Office		021 21 66 041	Aucklan
	415	Glenn	Nacdonald	Quality Assurance	Office		0211664346	Aucklan
	416	Don	MacKenzie	VB	Office		0212632975	Aucklani
	410	Robyn	Waters	Documentation	Office		021542050	Aucklan
	419	Kylie	Shipley	Project Nanagement	Gone Out	01:00 pm Tamperove	021412409	Aucklan
	450	Roy	Bate:	Service	Queue			Aucklan
	451	Neil	Gibcan	Financial	Office		021620295	Aucklan
	452	Natalia	Bell		Office		0211615795	Aucklane
	453	Grant	Petetten	Quality Assurance	Office		025922691	Aucillan
	1172	Cusio	CAL	C++	Office			devie by.

- 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	1	Column	Operator			Value		
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Ý	Department								
×	Location								
×	Return Time								
	Mobile								
	Region								
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		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		0212632975	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

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See Also

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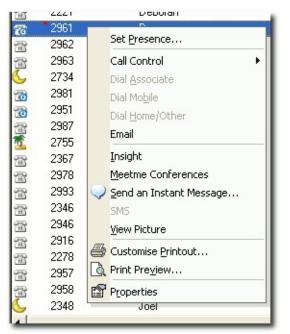
Directory Integration

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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See Also

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In This Section

Icons on the Main toolbar & Print Preview

Icons on the Main toolbar & Print Preview

On your Toolbar, you can Print and/or run a Print Preview with the icons from your top toolbar as well as the previously mentioned method.

To Print Preview

Select Print Preview icon

To Print

Select the Print icon

See Also

Print Preview

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:

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<u>r</u> ch fo	or:				i	n Column(s): (User Defin	ed) 🔻
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	07 M			Support Engineer CEO	Custo		
30	or 1.				Mana	Queue	
30	01 M 04 M		Lawal Creek	Marketing Manager	Sales	Agege	eeting

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.

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Print Preview

Directory Integration

Directory Integration

- Ø To view the directory integration with Lotus Notes R5 onwards
- 1. Select File from the Directory Menu
- 2. Select New

You will be presented with the Contact Option that enables you to integrate with Lotus Notes Contacts. For further information on Lotus Notes Contacts, please refer to Lotus Notes Manuals and/or Dialling from Lotus Notes Contacts.

Note The Contact option is also available from your Popup Screen.

See Also
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<u>SMS</u>
Send an Email message from the Directory
Extension Properties
View Extension Images
Customized Printout
Print Preview
Filtering the Directory

IPFX Extensions Shortcut Toolbar

🔨 🛷 Aynslie Gill 🍵 Chu Sau-Tung 🖓 Tayanita Creek 🕾 Koorong Jones 🖓 Noor Hafeez 😤 Torometi Tuki Para

Extensions, Queues and Personal Contacts from your email client and Company Directory Contacts can be added to your Extensions Shortcut Tool Bar.

The IPFX Extensions Shortcut Toolbar easily allows you to monitor and/or call Extensions and Contacts as well as view Queue activity, without viewing the entire Directory.

Tip! Hold down the **CTRL** key and click on a Shortcut to get more information about the extension, queue or contact.

Viewing the Extensions Shortcut toolbar

To view the Extensions Shortcut toolbar, click the **Show Extensions** icon in your bookmarks sidebar:



Click the icon a second time to turn off the Extensions Shortcut toolbar.

See Also
IPFX Extensions Shortcut Toolbar
Adding Extensions or Queues to your Extension Shortcut Toolbar
Adding Personal Contacts to your Extension Shortcut Toolbar
Adding Company Contacts to your Shortcut Bar
Dialling from your Extension Shortcut Bar
Setting Maximum Extensions per Toolbar
To view an Extension/Queue Location
To view Extension/Contact/Queue Properties

Adding Extensions or Queues to your Extension Shortcut Toolbar

To Add Extensions or Queues to your Extension Shortcut Toolbar

1. Click on the Extension Short Cut Wizard (first icon on the Extension Shortcut Toolbar).

~

The Shortcuts form will appear:

	Extension	First Name	Surname	Site	
	420	Keren	Schade	AKLMATRIX	
	441	Tony	Hartigan	AKLMATRIX	
	444	Craig	Carr (Analog)	AKLMATRIX	
	445	Glenn	Macdonald (Analog)	AKLMATRIX	
	446	AKL Fax Routing	Fax Routing	AKLMATRIX	
	447	Robyn	Waters	AKLMATRIX	
	448	Irek	Timergazi (Analog)	AKLMATRIX	
	449	Irek	Timergazi (Analog)	AKLMATRIX	
	450	Roy	Bates	AKLMATRIX	
	451	Aaron	Beveridge	AKLMATRIX	
	452	Melanie	Allison	AKLMATRIX	
2	453	Tech Support	Spare	AKLMATRIX	
	454	Craig	Carr	AKLMATRIX	
	455	Support	LDN	AKLMATRIX	
	456	Sharon	Brodie	AKLMATRIX	
	457	Joanne	Hulme	AKLMATRIX	
	458	Joanne	Price	AKLMATRIX	
	461	Demo	One	AKLMATRIX	i.

- 2. Click on the drop-down box at the top of the screen to choose Extensions, Queues, Personal Contacts, or Company Directory Contacts.
- 3. Tick the checkbox next to the Extensions, Queues, Personal Contacts or Company Contacts you wish to add to your extension toolbar.
- 4. Decide how you want your shortcuts to be arranged on your toolbar: in order of Extension number, First Name, Surname or Site. Click on the corresponding column heading to change the order in which the shortcuts will appear.

5. Click OK.

The Toolbars will now update with the extensions/queues.

See Also

IPFX Extensions Shortcut Toolbar

Viewing the Extensions Shortcut toolbar

Adding Personal Contacts to your Extension Shortcut Toolbar

Adding Company Contacts to your Shortcut Bar

Dialling from your Extension Shortcut Bar

Setting Maximum Extensions per Toolbar

To view an Extension/Queue Location

To view Extension/Contact/Queue Properties

Adding Personal Contacts to your Extension Shortcut Toolbar

To Add Personal Contacts to your Extension Shortcut Toolbar

1. Click on the Extension Short Cut Wizard (first icon on the Extension Shortcut Toolbar)

~

The Shortcuts form will appear:

1	Name	Business	M	obile Com		
	Vendy West	(09) 579 6443	027	595 Hom	P	
2 9	iharon Brodie	+64 093571156	+64	2269 Mobi	ie 1	

- 2. Click on the drop-down box at the top of the screen to show Personal Contacts.
- 3. Click in the checkbox next to the contact you want to add, then
- 4. Select the phone number that you want as the default number for that contact from the drop-down box on the top right.

See Also

IPFX Extensions Shortcut Toolbar

Viewing the Extensions Shortcut toolbar

Adding Extensions or Queues to your Extension Shortcut Toolbar

Adding Company Contacts to your Shortcut Bar Dialling from your Extension Shortcut Bar Setting Maximum Extensions per Toolbar To view an Extension/Queue Location

To view Extension/Contact/Queue Properties

Adding Company Contacts to your Shortcut Bar

To Add Company Contacts to your Extension Shortcut Toolbar

1. Click on the Extension Short Cut Wizard (first icon on the Extension Shortcut Toolbar)

~

The Shortcuts form will appear:

Description	Phone Number	Site 🔺
Andrew Lobb (cell phone)	021499490	AKLCTSERVEF
Ansett Pace	3092222	AKLCTSERVEF
Brisbane Office	0061735116669	AKLCTSERVEF
Darryl Crowder (cell phone)	021316464	AKLCTSERVEF
Roy Bates (cell phone)	021316655	AKLCTSERVEF
Brookfields	9792222	AKLCTSERVEF
 Corporate Cabs 	3770773	AKLCTSERVEF
Deadline Couriers	3571995	AKLCTSERVEF
🗌 Joanne Hulme (cell phone)	021922692	AKLCTSERVEF
Joanne Price (cell phone)	021922695	AKLCTSERVEF
Andrew McBeath (cell phone)	021922694	AKLCTSERVEF
Kevin Plumpton (cell phone)	021767016	AKLCTSERVEF
Sharon Brodie (cell phone)	021922693	AKLCTSERVEF
Craig Carr (cell phone)	021922698	AKLCTSERVEF
Kylie Shipley (cell phone)	021412409	AKLCTSERVEF
Duncan Miller (cell phone)	021316633	AKLCTSERVEF
Glenn MacDonald (cell phone)	0210412707	AKLCTSERVEF
Grant Petersen (cell phone)	025922691	AKLCTSERVEF 🖕

- 2. Click on the drop-down box at the top of the screen to show Company Contacts.
- 3. Click in the checkbox next to the contact you want to add.
- 4. Click OK.

Note These are system contacts that can only be changed by an IPFX Administrator.

See Also

IPFX Extensions Shortcut Toolbar

Viewing the Extensions Shortcut toolbar

Adding Extensions or Queues to your Extension Shortcut Toolbar Adding Personal Contacts to your Extension Shortcut Toolbar Dialling from your Extension Shortcut Bar Setting Maximum Extensions per Toolbar

To view an Extension/Queue Location

To view Extension/Contact/Queue Properties

Dialling from your Extension Shortcut Bar

To Dial from your Extension Shortcut Toolbar

- Click on the required extension on your Extension Shortcut Toolbar.
- The System will dial your selection.

To Dial an Extension within a Queue from your Extension Shortcut Toolbar

- Click on the required Queue on your IPFX Extensions Shortcut Toolbar.
- The Queue Screen displays.
- Double-click on your required extension from the list displayed.
- The System will dial your selection.

To Dial a Contact from your email client Contacts

- Click on the email client Contact from your Extension shortcut Toolbar.
- This will dial your contact.

To Select from the multiple numbers within an email client Contact

- Select the drop-down arrow to the right of the Contact name to display all their available numbers.
- Click on the number you require.
- The system will dial your selection.

To Dial a Company Contact

- Click on the Company Contact on your Extension shortcut Toolbar.
- The System will dial your selection.

See Also

IPFX Extensions Shortcut Toolbar

Viewing the Extensions Shortcut toolbar

Adding Extensions or Queues to your Extension Shortcut Toolbar

Adding Personal Contacts to your Extension Shortcut Toolbar Adding Company Contacts to your Shortcut Bar Setting Maximum Extensions per Toolbar To view an Extension/Queue Location

To view Extension/Contact/Queue Properties

Setting Maximum Extensions per Toolbar

When you have reached the maximum number of extensions per line a new line will display with the remaining extensions. This is calculated automatically.

Note The maximum extension setting calculates from the screen edge not the Lotus frame.

See Also
IPFX Extensions Shortcut Toolbar
Viewing the Extensions Shortcut toolbar
Adding Extensions or Queues to your Extension Shortcut Toolbar
Adding Personal Contacts to your Extension Shortcut Toolbar
Adding Company Contacts to your Shortcut Bar
Dialling from your Extension Shortcut Bar
To view an Extension/Queue Location
To view Extension/Contact/Queue Properties

To view an Extension/Queue Location

- Hold down the CTRL key on your keyboard and click on the Extension.
- The Location screen will open.

Location - Robyn Water	rs (41		(5	Ħ	29) ,,	<i>B</i>	e: }	mc ²	0)	¢	×
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12:30 AM	27	28	29	30	31	1	2	1	2	3	4	3	6	7
12:45 AM	3	4	5	6	7	8	9	8	9	10	11	12	13	14
1:00 AM	10	11	12	13	14	15	16	15	16	17	18	19	20	21
1:15 AM 1:30 AM	17	18	19	20	21	22	23	22	23	24	25	26	27	28
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2:15 AM 📃														
Office Operator Instructions If Bob calls blease put the	call th	roug	h.											ear
										<u>о</u> к		<u>(</u>	Cance	el

See Also

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Adding Extensions or Queues to your Extension Shortcut Toolbar

Adding Personal Contacts to your Extension Shortcut Toolbar

Adding Company Contacts to your Shortcut Bar

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Setting Maximum Extensions per Toolbar

To view Extension/Contact/Queue Properties

To view Extension/Contact/Queue Properties

- Hold down the Shift key (on your keyboard) and click on the Extension/Contact/Queue.
- The Extension/Contact/Queue Properties form will open.

Note: Extension and Queue properties can only be viewed by an IPFX Administrator.

See Also

IPFX Extensions Shortcut Toolbar

Viewing the Extensions Shortcut toolbar

Adding Extensions or Queues to your Extension Shortcut Toolbar

Adding Personal Contacts to your Extension Shortcut Toolbar

Adding Company Contacts to your Shortcut Bar

Dialling from your Extension Shortcut Bar

Setting Maximum Extensions per Toolbar

To view an Extension/Queue Location

Queues

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

The IPFX Contact Centre module must be purchased for this to be available. This icon is not available on IPFX Call Centre Express for users (only IPFX Supervisor Agent/IPFX Administrators).

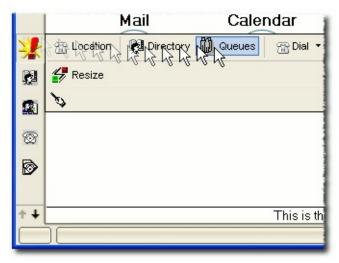
To view Queues

• Click the **Queues** icon in bookmarks sidebar:



or

Open the Phone Control toolbar and select **Queues**:



The Queue Summary screen will appear:

Ē	ile <u>E</u> dit	<u>Action</u> <u>V</u> iew	Help									
3	Techwr	ite01 🔀 View	Extensi	ions 🔻		🔐 Dia	al 🕶 🛔	Ξ				
	Queue	Description	Mode	Status	Calls	Longest	Agents	Answered	Abandoned	Other	GOS	Site
1	300	Operator Queue	Auto	OPEN	0	00:00	1	0	0	0	100%	
]	401	Support Queue	Auto	OPEN	0	00:00	2	0	0	0	100%	

Across the top of the queues are the Column Headers. 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. This is set by the Telephony System.

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 Phone (dependent on PABX), or a users screen pop to allow Call Centre Agents to differentiate which queue a customer is calling.

- 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 to Queue, Forward to Message. States the queues real-time status.

Calls

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

Longest

The longest wait time of all calls in the queue at that point in 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.

i.e. Hung up once they 'entered' the queue. There is an abandoned call time that can be set by the Administrator to be longer or shorter based on the queue requirements. The default is 5 seconds.

e.g. If a call abandons before being in the queue for 5 seconds, it will not show on the statistics.

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.

Site

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

Note Queues are not usually manually opened, otherwise the Queue would remain open until such time as it is Reset. Check with your Call

Centre Supervisor/Administrator.

See Also

<u>Queues</u>

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 performances and Call Flow for each queue.

Click on the queue icon.

Double click on the queue required.

Extn		[00:03] Last name	Calls Max=1 [00 Presence	Return time	505=0% Answered	d Avg Talk	Access	Abn=1 Skill	Othe Entry Time	Entry Cour
2910	Alan	Marks	Office	netum une	Answered	00:00	Access	None	Instant	Instant
2913	Michelle	Hewlett	Away On Busine	12:00:00 p.m."		00:00	Disabled	2	Instant	Instant
2918	Phillip	Stewart	Office		0	00:00	Auto	∠ None	Instant	Instant
2919	Michele	Barnett	On A Break	4:00:00 p.m. T	_	00:00	Auto	2	Instant	Instant
2950	Roy	Bates	Prime Time		000,0	00:00	Auto	None	Instant	Instant
2953	Tamara	Rudd	Gone Out	7:30:00 a.m. T		00:00	Auto	None	Instant	Instant
2956	Sharon	Brodie	Gone Out	11:00:00 a.m.		00:00	Auto	6	Instant	Instant
2957	TR	Ellis	Queue		0	00:00	Disabled	None	Instant	Instant
2958	Joanne	Price	Gone Out	4:00:00 p.m. T	oday O	00:00	Disabled	None	Instant	Instant
2961	Demo	One	Office		0	00:00	Disabled	None	Instant	Instant
2963	Demo	Softphone	Office		0	00:00	Disabled	None	Instant	Instant
2981	Edward	Moore	Office		0	00:00	Disabled	None	Instant	Instant
Extn	и S	ubject	C	aller	Status	Queue Time	Ring Time	Talk Ti	ime Wrapup T	ime Trunk
	Demo Queue		Phillip Stewar	t	Queueing	00:03	00:00	00:00	00:00	2918

Top Segment of Queue Details Shows all Agents (and their extensions), Presence state of each Agent, the Calls answered by each Agent, 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 the Queue and is available to take queue calls.

A yellow or white telephone with a clock on the top bottom 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 Presence. 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.

To View Queues, Extensions or the Company Directory from within the Queues Directory

Click View Extensions from the Top Toolbar.

Select the Directory you wish to view.

Network		View Exte	ensions 🔹 📘	📔 📸 Dia
	Queue	Extension	Directory	Mode
Ŵ	401	Company	Contacts	Manual
Ŵ	404			Manual
Ŵ	408	Car Queue		Manual
A	406	Gullivers Interna	tional Travel	Auto
	407	Gullivers Domes	tic Travel	Auto

Once selected, the view will change - thus saving you from closing and going into the Directory from your client's main screen.

See Also
<u>Queues</u>
What is a Queue?
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 the calls currently in the queue either answered or queuing

- 1. Click on the queues icon on the toolbar.
- 2. Double click the queue you want to view.

The bottom half of the screen shows all current Queue Calls

🕸 Queue 2990 - Demo Queue											
🕅 View Extensions 🔻 🔚 😰 🛛 🍇 Hang Up 💌 💱 🛱 🛱											
٩ge	nts=0 of	12 Calls=1 [[00:03]	alls Max=1 [00:	:09]	GOS=0%	Ans=0)	Abn=1	Othe	r=0
	Extra	First name	Last name	Presence	Return tim	e Answered	Avg Talk	Access	Skill	Entry Time	Entry Count
		Alan		Iffice	-	0	00:00	Auto	None	Instant	Instant
7			Hewlett A	way On Busine	12:00:00 p.m.	Tom:0	00:00	Disabled	2	Instant	Instant
Ż	2918	Phillip	Stewart C	Iffice	-	0	00:00	Auto	None	Instant	Instant
		Michele	Barnett C	In A Break	4:00:00 p.m. 1	Foday O	00:00	Auto	2	Instant	Instant
		Roy		Prime Time	•	0	00:00	Auto	None	Instant	Instant
		Tamara	Rudd G	ione Out	7:30:00 a.m. 1	Fomoi O	00:00	Auto	None	Instant	Instant
	2956	Sharon		ione Out	11:00:00 a.m.	Tom: 0	00:00	Auto	6	Instant	Instant
ŝ	2957	TR	Ellis G	lueue		0	00:00	Disabled	None	Instant	Instant
	2958	Joanne	Price G	ione Out	4:00:00 p.m. 1	Foday O	00:00	Disabled	None	Instant	Instant
)	2961	Demo	One C	Iffice	-	0	00:00	Disabled	None	Instant	Instant
3	2963	Demo	Softphone C	lfice	-	0	00:00	Disabled	None	Instant	Instant
0	2981	Edward	Moore C	lífice		0	00:00	Disabled	None	Instant	Instant
	Extn∆	Su	ubject	Ca	ller	Status	Queue Time	Ring Time	Talk T	ime Wrapup T	ime Trunk
8		Demo Queue	••••	Phillip Stewart		Queueing (0:03	00:00	00:00	00:00	2918

As calls (or other media: Fax, Email or Callback) are presented to an agent, the telephone icon in the leftmost column changes from yellow to red.

When the call is answered the caller status changes from **Queuing** to **Ringing.**

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 and Contact 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 allow customers to receive announcements and to prevent high ring times.

In This Section

<u>Queue Calls</u>

Document Queuing

How a Callback presents itself to an Agent

See Also

Queues

What is a Queue?

Viewing Queues

Viewing Queue Agents and Call Flow

Queue Pickup

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:

	s=2 of 4 Cals=1 [01:01]			Calls Max=3 [06:27]				G05=50%			Ans=13	
Extrv	First name	Last nam	e Location	Reta	um time	Answered	Avg Talk	Acc	ess Ski	II Entry Time	8	
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	
2252	Anthony	Pengue	Queue	· ·		9	00:05	Auto	5	Instant	Inst	ant
-	1					-	-	-			-	-
Extr	Subj Example	ect	Caller Anthory.Pengue@	infy com	Status	Queue 01:01	Time Ring) Time	Talk Time	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 My Voice Ma	ail 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 🛆 1		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 in the queue group.

To pick up and transfer a call

- 1. Click on the **Queues** icon.
- 2. Double-click on the queue to view the queue calls.

						OS=0% Ans=0			Abn=1		Other=0	
	Extr	First name	Last name	Presence	Return time	e Answered	Avg Talk	Access	Skill	Entry Time	Entry Cour	
	2910	Alan		Office		0	00:00	Auto	None	Instant	Instant	
		Michelle		Away On Busine	12:00:00 p.m.		00:00	Disabled	2	Instant	Instant	
		Phillip		Office	-	0	00:00	Auto	None	Instant	Instant	
	2919	Michele			4:00:00 p.m. T		00:00	Auto	2	Instant	Instant	
	2950	Roy		Prime Time		0	00:00	Auto	None	Instant	Instant	
	2953	Tamara			7:30:00 a.m. T		00:00	Auto	None	Instant	Instant	
	2956	Sharon			11:00:00 a.m.		00:00	Auto	6	Instant	Instant	
	2957	TR		Queue	Security of	0	00:00	Disabled	None	Instant	Instant	
		Joanne			4:00:00 p.m. T	• 23	00:00	Disabled	None	Instant	Instant	
	2961	Demo		Office	•	0	00:00	Disabled	None	Instant	Instant	
	2963	Demo		Office		0	00:00	Disabled	None	Instant	Instant	
	2981	Edward	Moore	Office		0	00:00	Disabled	None	Instant	Instant	
	Extn∆	Si	ubject	Ca	ller	Status	Queue Time	Ring Time	Talk Ti	me Wrapup T	ime Trunk	
		Demo Queue		Phillip Stewart		Queueing C	0:03	00:00	00:00	00:00	2918	

3. Click on the unanswered/unassigned call and drag it out of the queue calls and onto your extension.

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

up.

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

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

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

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

Last Agent to Log out of Queue Notification

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



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

See Also

<u>Queues</u>

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:

Call Control

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 Management Properties	×
General Agents Schedules Announcements Priority/GOS Alarms	Notes Pref Agents Wildcards Holidays Permissions
General Queue Information.	Dptions Virtual Queue: Eorce wrapup codes: Use Password: Use Qriginal Queue Priorities
Queue/Time Skill Priority Customer Priority Priority	Extension No Answer Leturn to Queue after 10 seconds. Temporary Logout for 10 seconds. Dermanent 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

Call Control

This feature gives you the ability to control your telephone from your PC.

Click on the Call Control icon on the IPFX Phone Control Toolbar and a drop-down list will appear with the following functions or, alternatively, you can right-click the Location icon in the System Tray.



Note: Monitor and Intrude are only available if an IPFX Supervisor Agent license and IPFX Contact Centre module is purchased

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

- 1. Click on the Answer button (This is the Dial button that changes based on the phone state).
- 2. Select Answer from the drop-down list.

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

or

3. If you are currently on a call, you can hangup the call without having to replace the handset on your phone - regardless of the phone type.

For headset users, this is a convenient way of handling your phone calls without taking your eyes off your screen.

Dial/Making an Outbound Call

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

6

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:

		umber you want to a al numbers.	dial. No prefix is
	1		
jal			

- 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 Call Control 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>

Intrude

Forward to Voicemail

Dialling from your Lotus Notes Address Book

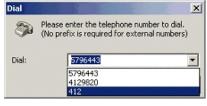
Send a message

Record

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

Call Control

Dial/Making an Outbound Call

Answering a Call

Hangup/Completing a Call

Transferring a Call

Complete Transfer

Cancel Transfer

<u>Hold</u>

Resume

Queue Hold

Queue ResumeHold ForPickupMonitorIntrudeForward to VoicemailDialling from your Lotus Notes Address BookSend a messageRecord

Answering a Call

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

Call Control

Dial/Making an Outbound Call

Recently Dialled Numbers

Hangup/Completing a Call

Transferring a Call

<u>Complete Transfer</u>

Cancel Transfer

Hold

Resume

Queue Hold

Queue Resume

Hold For

<u>Pickup</u>

<u>Monitor</u>

<u>Intrude</u>

Forward to Voicemail

Dialling from your Lotus Notes Address Book

Send a message

<u>Record</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
Call Control
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
<u>Intrude</u>
Forward to Voicemail
Dialling from your Lotus Notes Address Book
Send a message
Record

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
<u>B</u> lind Transfer
Supervised Transfer
C <u>o</u> mplete Transfer
C <u>a</u> ncel Transfer
Hold
<u>R</u> esume
Queue Hold
Q <u>u</u> eue Resume
Hold <u>F</u> or
Pickup
<u>C</u> onference
Monitor
Intrude

2. 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		
	number you want to tr or external numbers.	ansferto. No
	Transfer	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

Call Control

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

Forward to Voicemail

Dialling from your Lotus Notes Address Book

Send a message

Record

Complete Transfer

To complete the Transfer

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

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

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

See Also
Call Control
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

Pickup Monitor Intrude Forward to Voicemail Dialling from your Lotus Notes Address Book Send a message Record

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
Call Control
Dial/Making an Outbound Call
Recently Dialled Numbers
Answering a Call
Hangup/Completing a Call
Transferring a Call
Complete Transfer
Hold
Resume
Queue Hold
Queue Resume
Hold For
<u>Pickup</u>
Monitor
Intrude
Forward to Voicemail
Dialling from your Lotus Notes Address Book
Send a message
Record

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.

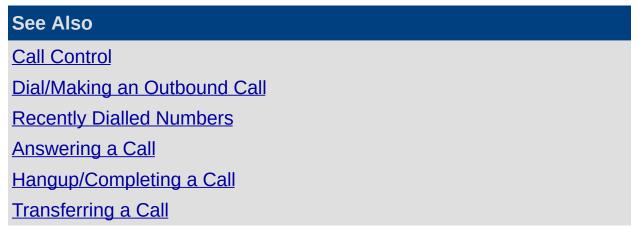
Note This is applicable only to sites utilizing IPFX for Call Manager.

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
C <u>o</u> mplete Transfer
C <u>a</u> ncel Transfer
Hold
<u>R</u> esume
Queue Hold
Q <u>u</u> eue Resume
Hold <u>F</u> or
Pickup
<u>C</u> onference
Monitor
Intrude

2. Select Hold to place the caller on hold.



Complete Transfer

Cancel Transfer

<u>Resume</u>

Queue Hold

Queue Resume

Hold For

<u>Pickup</u>

<u>Monitor</u>

Intrude

Forward to Voicemail

Dialling from your Lotus Notes Address Book

Send a message

Record

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 **Call Control 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 Forward to Voicemail **Dialling from your Lotus Notes Address Book** Send a message Record

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.

۲
r

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

Call Control

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 Resume

Hold For

<u>Pickup</u>

Monitor

Intrude

Forward to Voicemail

Dialling from your Lotus Notes Address Book

Send a message

Record

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
Call Control
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
Hold For
<u>Pickup</u>
Monitor
<u>Intrude</u>
Forward to Voicemail
Dialling from your Lotus Notes Address Book
Send a message
Record

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
Queue 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

Call Control

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

Forward to Voicemail

Dialling from your Lotus Notes Address Book

Send a message

Record

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	
	<u>B</u> lind 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	

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

Call Control

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>Monitor</u>

Intrude

Forward to Voicemail

Dialling from your Lotus Notes Address Book

Send a message

Record

Monitor

To Monitor the conversation of another party

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

	Answer
	<u>D</u> ial
ļ	<u>H</u> ang up
ļ	Blind Transfer
	Supervised Transfer
1	C <u>o</u> mplete Transfer
-	C <u>a</u> ncel Transfer
ļ	Hold
	<u>R</u> esume
-	Queue Hold
	Q <u>u</u> eue Resume
I	Hold <u>F</u> or
	Pickup
!	<u>⊂</u> onference
ļ	Monitor
	Intrude

The Monitor screen displays.

Monitor		×
D Ple	ase enter the extension	to monitor.
Monitor:	412	

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

Call Control

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

Pickup

Intrude

Forward to Voicemail

Dialling from your Lotus Notes Address Book

Send a message

Record

Intrude

Note This feature requires IPFX Administrator privileges.

To Intrude on a call

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

gial Jang up Jind Transfer Jupervised Transfer Somplete Transfer
gind Transfer
upervised Transfer
I <u>o</u> mplete Transfer
I <u>a</u> ncel Transfer
told
lesume
Queue Hold
Queue Resume
Hold <u>F</u> or
2ickup
onference
<u>1</u> onitor
ntrude

The Intrude screen displays.

Intrude	X			
Please enter the extension to Intrude.				
Intrude: 418	-			
Intrude	Cancel			

2. Enter the extension number and click Intrude.

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

The Default settings for this feature are:

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

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

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

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

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

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

Warning!

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

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

See Also

Call Control

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

Pickup

Monitor Forward to Voicemail Dialling from your Lotus Notes Address Book Send a message Record

Forward to Voicemail

Sends an incoming call to voicemail.

See Also
Call Control
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 Resume
Hold For
<u>Pickup</u>
Monitor
<u>Intrude</u>
Dialling from your Lotus Notes Address Book
Send a message
Record

Dialling from your Lotus Notes Address Book

IPFX Mail Manager supports dialling numbers directly from your Lotus Notes Address Book.

To dial a number from the Lotus Notes Address Book

- 1. Highlight the Contact you want to call and click the **Call Control** icon from the Phone Control tool bar.
- 2. Click **Dial Contact** from the drop-down Call Control list.

Note This can be done from the Contact Summary screen or from within the Contact itself.

You will be offered the telephone numbers associated with that contact (e.g. Business, Mobile, Home).

- 3. Select the preferred option from the telephone numbers offered.
- 4. Click OK.

Your phone will now ring that number.

If you have a Dterm/Digital phone, your telephone will now be in hands free mode.

or,

- 1. Highlight the Contact you want to call and click the **Dial** button on the top tool bar.
- 2. Select the preferred option from the telephone numbers offered.
- 3. Click OK to call that number.

Note: If you have an Analogue phone, your phone will ring. When you answer, activate call set-up by saying "Hello".

This can be done from the Contact Summary screen or from within the Contact itself.

See Also

Call Control

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>

<u>Monitor</u>

Intrude

Forward to Voicemail

Send a message

Record

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 Misend button on the toolbar.

The Send a New Message screen will appear:

Voicema	il Message 🛛 🤇) SMS Message	(🖲 Em	ail	
o						
xtensions:			_	Distrit	bution Gro	
Extr	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	ıb	Description
	0	Operator	Operator		AL	L
	9443	Grant	Petersen	050	Sei	rvice
7	9444	Grant	Petersen			
	9445	ATA	Line 2			
~	9446	Sharon	Brodie			
~	9447	Andrew	Richards			
	9448	Roy	Bates			

Subject

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

When

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

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

Options

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

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

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

Controls

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



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

and listen to the message before you send it.

Play

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

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



To send the message, click on the Send button.

Send

To Send an SMS Message

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

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

To Send an Email

Same as SMS, but for Email.

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

See Also

Send a message

What is "Sending a Message?"

Record

In This Section

What is Record?

Recording Criteria

Stop Recording a Conversation

Recording a Conversation

See Also

Call Control

<u>Dial/Making an Outbound</u> <u>Call</u>

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>

<u>Monitor</u>

Intrude

Forward to Voicemail

Dialling from your Lotus Notes Address Book

Send a message

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.

Record

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



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

Stop Recording a Conversation

To stop recording a conversation

1. Click the **Recording** icon.

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

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

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

See Also
Record
What is Record?
Recording Criteria

Recording a Conversation

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 Clear Work Time 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

<u>Clear Work Time</u>

Setting default Work Time

Custom Work Time

To set Custom Work Time

1. Click the Work Time icon on the toolbar.



A drop-down box will appear:

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

2. Click Custom work time.

The Custom Work time dialog will appear:

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

No	'k 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.

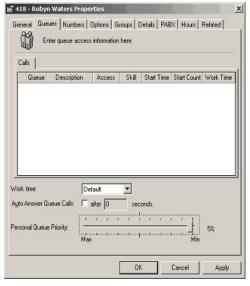
Your Location will change back to your previous setting.



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

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

CTI Options

This section refers to the available on the IPFX for Lotus Notes menu bar that pops up when you hover over the icon to the left-hand side of the email client screen.

The version of IPFX software you are running (at top) and these features (at bottom) are displayed on all tabs:

This Feature	Does This	
Change Password	 Allows you to change your password. When you select this option, a Set Password box appears. Enter and confirm your new password. Click OK to change. Next time you open the application you can use your new password. 	
	Note: Only numeric characters 0 9 are allowed for your password and it must not start with a 0. It must also be between 4 and 15 digits long.	
Clear Saved Password	Enables you to reset the password prompt at the start-up screen (when the user has checked 'Save Password' at startup).	
Synchronise Contacts	Enables you to synchronise your Contacts between the IPFX Client and your email client manually [this feature only available in IPFX for Outlook and IPFX for Lotus Notes].	
Reset Toolbars	This feature enables you to reset your Toolbars to the default setup as set by the Administrator [this feature only available in IPFX for Outlook and IPFX for Lotus Notes].	
	This allows you to customise the view of your Directory without affecting other users, e.g. if you wish to see the Directory columns in the order of extension number, first name, last name, department, location, mobile number, etc.	
	Please see your Administrator for access privileges if required.	
	Click on the Directory Fields button -	

• The screen below displays

	uld like to show in your personal extension directory. are required, and cannot be removed from the directo	
A <u>v</u> ailable fields: Access Number Associate Birthday Building Location Location Start Time Mobile Office Extension Pager	Show these fields in this order: Add -> (Status Icon) *Extension Title *First Name *Last Name Position Department Location Return Time Region *Server Home/Other	OK Cancel

• Select fields required.

Customize Directory View...

- Use Move UP/Move Down buttons to place selected fields in required order.
- Click **OK** when completed.

You will have to shut your email client down and reopen to view the Directory Column changes.

General Tab

This Feature Does This

Set my locations from appointments (based on keywords)	Allows you to integrate your Location settings with your Calendar options, i.e. if you set a Calendar Appointment and enter the Location within the Subject or Location fields in your email client, this will automatically update your Voicemail Location. Tick the checkbox to turn this feature on. For further information on this feature, refer Calendar Functionality.
Create appointments from locations	Automatically creates an appointment in your Calendar when you change your Location. Tick the checkbox to turn this feature on.
Show virtual queues	Allows you to also view virtual queues. Tick the checkbox to turn this feature on.
	Synchronises your email client's Contacts into your IPFX Client. This will enable you to speed up CLI searching and utilise functionality in both applications without having to duplicate the entries. This feature is OFF by default. Tick the checkbox to turn this feature on.
	If this feature is turned on:
Synchronise contacts	 Additional Contacts or changes within your email client will automatically update within your IPFX Client; Deletions within either your IPFX or email client will update each other accordingly; Changes with your IPFX Client will update your
	email client when the programmes are next opened (alternatively, you can click the Synchronise Contacts button anytime to make an immediate change).
Auto answer picked up calls	Enables your phone to auto-answer any calls you have picked up. Tick the checkbox to turn this feature on or, if you wish your phone to ring first (so that you can press the Answer key on your phone or pick up the handset to answer the call), remove the tick from this checkbox.

Show telephony group	Shows the Directory and Queue icons within the email client's Shortcut menu on the left side of the screen. Tick the checkbox to turn this feature on. Note This feature is only available in IPFX for Outlook.
(email client) owns interface	Ensures the IPFX Client's Directory and Queue view always display in front of the main email client window. Tick the checkbox to turn this feature on.
Client logging	The feature gives the user the ability to enable/disable the logging feature. This feature is OFF by default. Tick the checkbox to turn this feature on.
Do not allow supervised transfers	Disables Supervised Transfers so the user can only do a Blind Transfer. For use with Cisco 7912 phones as they can only do Blind Transfers. Tick the checkbox to turn this feature on.
View Operator Message Indicator	Places a small red dot next to extensions with associated Operator Instructions in the Directory
Max shortcuts per line	Depending on your screen resolution of your Desktop, you may have extra room at the end of each IPFX Shortcut Bar at the top of your screen for more extension shortcuts. If this is the case, you can increase this Maximum Shortcuts per line feature from the default (usually set at 8 or 10) to a higher number (i.e. 15).
Away status time (mins)	Sets a timer based on the movement of your mouse and keyboard to alert others that you may be away from your desk. The time is set in minutes, e.g. 5 equates to '5 minutes'. If you have not moved your mouse or keyboard after this time, your location icon shows a timer on it (i.e.) to advise other users that you may no longer be at your desk. Enter a value in the text box to turn this feature on. If this feature is now on and you are a Call Centre Agent that has been temporally logged out of the queue, you can manually log back into the queue by selecting your Location accordingly.

Days in advance to synchronise calendar appointments	Enables you to specify how many days in advance you would like your appointments synchronised between your email client and the IPFX Client. This feature is ON by default. The default is set to 30 days.
Use custom folder for voicemail	Allows you to set up an rule in your email client so that it saves your Voicemail messages to a folder other than your In Box, you will need to advise the IPFX Client what folder you have set the Voicemail redirection to. This is to ensure that when you delete a Voicemail message via the phone, it also deletes the copy of the message in the folder. If not set and the auto rule moves the Voicemail out of your In Box, the message will be deleted from your Voicemail server.
synchronisation	Note This feature is only available in IPFX for Outlook. When Voicemail messages are deleted, they are kept for 3 working days in the Voicemail system. However, if deleted in your email client and your Voicemail messages have .WAV files attached, they are kept indefinately based on your email client's settings.

See Also	
CTI Options	
<u>Network Tab</u>	
<u>Popups Tab</u>	
Lotus Tab	

Network Tab

This Feature	Does This
Address	This is the TCPIP address of the CTServer. This enables your client to locate the CTServer for sending and receiving information.
Name	This is the alpha name of the CTServer.
Port	This is the port number of the CTServer.
	This should be the same extension as your phone.
Extension	TIP To check if this Extension number is correct, if you have a digital phone pick up the receiver and the extension number will show on the screen or dial another extension that has a digital phone to see what your extension number is when it comes up on their screen.

See Also
CTI Options
<u>General Tab</u>
Popups Tab
Lotus Tab

Popups Tab

This Feature Does This Because this feature is OFF by default, you will receive a dialog box asking if you wish to have your Location set back to Office when it reaches the expiry time (so that if Auto Return you are not back in the office when expected, your Location location does not automatically expire). Tick this checkbox if you wish your Location to change back to Office immediately upon expiry. This is the first of two Popup Screen options. **Popup call** screen allows you to not only view but record incoming call information (i.e. you will be able to select wrapup Popup call codes and enter notes (see "" on page 22) if you have screen enabled these options). If you want this as your default popup screen and Call Alerts (below) make sure you clear the **Call Alerts** checkbox. For further information on this feature, refer to Alerts (see "" on page 16). This is the second of two Popup Screen options. Call Alerts make you aware of an incoming call in the form of a simple Popup Screen on the bottom right side of your PC screen. From this screen, you can click **Answer** to Call Alerts speak to the caller or send the call directly To Voicemail. Tick the checkbox to turn this feature on (it will also tick the **Popup call screen** box but will not be overridden by it). For further information on this feature, refer to Alerts (see "" on page 16). This feature uses a similar Popup Screen to Call Alerts Location (above) and notifies you that your Location has changed Notification or expired. From this screen, you can click **Change** to Alerts amend your Location setting. Tick the checkbox to turn this feature on. For further information on this feature, refer to Alerts (see "" on page 16).

	If you wish to receive notification of Alerts or Warnings Alarms from the IPFX Contact Centre, you can select what Queues you wish to receive these from.
Queue Alarms	Note This feature only available if an IPFX Contact Centre module is purchased. Note 2 If you already receive alarms and this feature is not ticked, please see your IPFX Administrator as you may be set up at an incorrect Queue Level.

See Also
CTI Options
<u>General Tab</u>
Network Tab
Lotus Tab

Lotus Tab

Important: The settings on this tab should be set up by the Administrator and not changed.

This Feature	Does This
INI File Location	Location of INI file
Password	System-wide password
Private Address DB	Name of the Private Address Database in Lotus Notes
Company Address DB	Name of the Company Address Database in Lotus Notes
Alternate Company Address DB	Name of an Alternate Company Address Database if used in Lotus Notes

See Also
CTI Options
<u>General Tab</u>
<u>Network Tab</u>
Popups Tab

Resize

As a user, you can resize your Phone Control Toolbar to eliminate the Captions from the Toolbar.

Click on the **Resize Icon** on the Phone Control Toolbar.

- The Phone Control Toolbar will resize without Captions.
- If you click on the resize icon again the Captions will reappear.

Queue Notes

(Only applicable if you have a Call Centre).

Always LOG IN when you sit down at your desk and always LOG OUT when leaving.

Queues in which I am an agent

Queue Number	Queue Name
Extension Usually Used:	
Supervisor:	
See Also	
Queue Notes	
Wrapup Codes (if use	<u>ed)</u>

Wrapup Codes (if used)

Queue Number	Queue Name
See Also	

Queue Notes

Queues in which I am an agent

Insight - Viewing Extension Details and Appointments

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

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

😻 Insight: E	xtension	412										X
2.	m .			<u>8</u> 2		<u></u>		7	2	5	V	
Location	Dial	Office Extn	Voice Mail	Associate	Mobile	Home/Other	Pager	Hold For	Hold	Record	Release	
Main Use	er Details	Related Scl	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 "<u>Call Control</u>" 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	Extension	412								×
Location	Dial				Morne/Other		The second secon		Release	
Main Use	er Details	Related Sci	hedule							
User: From: Greeting:	Masina	Maher			Status: Reason:	Office				
Operator	Instructio	ons								
Call Histor	ry									
Date	e 1	Time			Last Cont	act				
								<u>0</u> K	Car	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.

This will display the details screen as shown below



all Parties Notes Aay 31 2004 12:43PM : VM Port1 (840)	and Robyn Waters (Analog) (447)	

This is only visible when on a live call.

See Also

Insight - Viewing Extension Details and Appointments

Viewing User Tab of Insight

Viewing Related Tab of Insight

Viewing Schedule Tab of Insight

Viewing User Tab of Insight

Functionality within the User Tab

Insight		<u>Dave</u>					3					>
Carlon Di		Office Extn	v	Associate		Ge Home/Other		Hold For	The second secon	Record	Release	
Main User De	stails	Related Sc	hedule									
Miscellaneous	s Info	mation:										
De	scriptio	n					Value					
Description			Building O	ne								
Car Registration)		1									
Access No												
Building Level												
Position	P	oduct and Tr	aining Direct		_							
			-		_							
Department	Do	cumentation										
<u>Begion</u>	Au	ickland										
										<u>o</u> k	دي [ncel

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.

Extensions: Name	Relationship
Robyn Waters	Documentation
Spare Extn	Training
Aaron Beveridge	Finance
Joanne Hulme	Projects
Contact	Relationship
Condet	n Gaudra ip
	er Detail: Related Extensions: Name Robyn Waters Spare Exin Aaron Beveridge Joanne Huîme

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

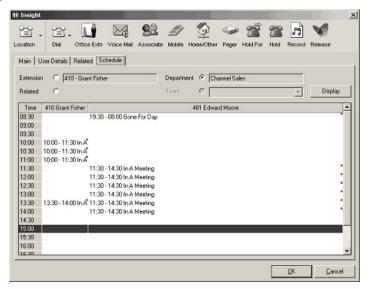
<u>Viewing Main Tab of</u> <u>Insight</u>

Viewing User Tab of Insight

Viewing Schedule Tab of Insight

Viewing Schedule Tab of Insight

Functionality within the Schedule Tab



This Feature

Does This

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

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

See Also

Insight - Viewing Extension Details and Appointments

Viewing Main Tab of Insight

Viewing User Tab of Insight

Viewing Related Tab of

Insight

Suppressing Voice Capture

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.

Notes