IPFX for Outlook

Product version 4.3 SP4



What is IPFX for Outlook?

IPFX for Outlook is a powerful, easy to use tool that lets you access your personal voicemail mailbox and Call and Contact Centre facilities from within Microsoft Outlook 2000, 2003 or XP.

IPFX for Outlook centralizes your communication tools by merging your e-mail software and your voicemail mailbox into one system. Using IPFX for Outlook you can access your voicemail messages from within your email client's InBox. Just double-click on a voicemail message to have it played through your computer speakers or telephone handset.

IPFX for Outlook also allows you manage information about your location and availability, and to view the locations and availability of your colleagues and other internal extensions, including Call Centre Queues and Agents (if applicable).

About This Guide

Who This Guide Is For

This guide is for anyone who uses the IPFX for Outlook product.

IPFX Administrators will find additional information about configuring queues and extensions in the *IPFX Administrator Guide*.

See Also

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What this guide covers

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What this guide covers

This User Guide will show you how to:

- Start IPFX for Outlook.
- Use Locations to:
 - handle incoming calls when you are away from your desk.
 - provide your callers and colleagues with information about your availability.
- Use the IPFX Toolbar to:
 - view information about your colleagues' availability.
 - dial, answer calls, transfer calls and more using your computer instead of your phone.
- Add Shortcut buttons to your IPFX for Outlook toolbar, so you can dial your contacts with a single mouse click.

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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).

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Typographical Conventions

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

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

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

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Getting Help

Press **F1** within any IPFX screen for online product help.

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

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

Postal Address: PO Box 105 079, Auckland Central, New Zealand

Website: http://www.ipfx.com

Sales/Channel Enquiries: sales@ipfx.com

New Zealand Help Desk: e support.nz@ipfx.com p +64 9 357 1155

Australia Help Desk: e support.au@ipfx.com p +61 2 9779 3998 or 1300

737 367

United Kingdom Help Desk e support.uk@ipfx.com p 0870 850 2058

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Before You Begin

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

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

Passwords should:

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

Example: John Smith #

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

- 5. Press 1 to Listen to your name; or
 - Press 2 to Re-record
- 6. Press # to Continue (when satisfied with the name recording)
- 7. Record your standard greeting (after the tone)

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

8. At the end of your recording, press #

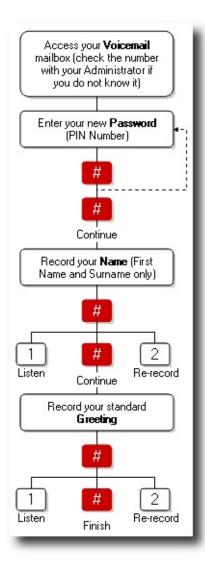
- Press 1 to Listen to your greeting; or Press 2 to Re-record
- 10. Press # to Finish and Hang Up (when satisfied with your greeting)

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

Phone Forwarding (NEC Only)

Please do the following action to activate Phone Forwarding:

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



Starting IPFX for Outlook

IPFX for Outlook loads automatically when you start Microsoft Outlook.

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

Starting IPFX for Outlook

Password Verification

Password Verification

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

- 1. 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> up on your phone and click **OK**.



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

Starting IPFX for Outlook

Security Warning - Windows XP SP2

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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.

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Locations and default return times

Location

Default return time



Queue (Yellow phone)

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

N/A. You will generally remain logged into your queue until you manually set yourself to a different location.



Office (White phone)

N/A. Office is the default location: you are at your desk. Your location will remain in the "Office" state until you manually set yourself to a different location.

However, the system will assume that you have left your desk or are otherwise occupied if you do not use your keyboard or mouse for a while - 5 minutes by default.

While the system believes that you are away from your desk, people viewing your location information will see a small clock superimposed over the white phone icon.

Moving your mouse or using your keyboard will immediately return your location to the normal Office status.



In A Meeting



or 💥

Do Not Disturb or Prime Time



Gone Out

1 hour

1 hour

1 hour

purchased separately.



Gone For Day

Beginning of business, the next day.

Note: The Prime Time module must be



On Leave

Beginning of business, the next day.



Sick Leave

Beginning of business, the next day.



On A Break

15 minutes.



Away On Business

Beginning of business, the next day.

Break Codes: declaring a specific type of break

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

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



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

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



Note: Your IPFX

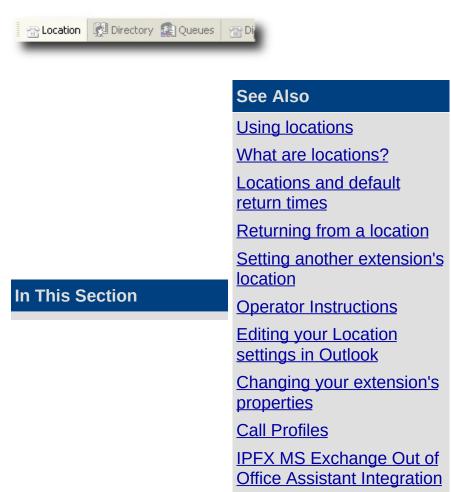
Administrator can add and

edit break codes.

Setting your location in IPFX for Outlook

To set or change your location, open the Location screen by clicking on the Location button in the IPFX for Outlook toolbar:

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:



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

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

See Also

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Setting another extension's location

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

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Setting another extension's location using Outlook's Extension Shortcut Toolbar

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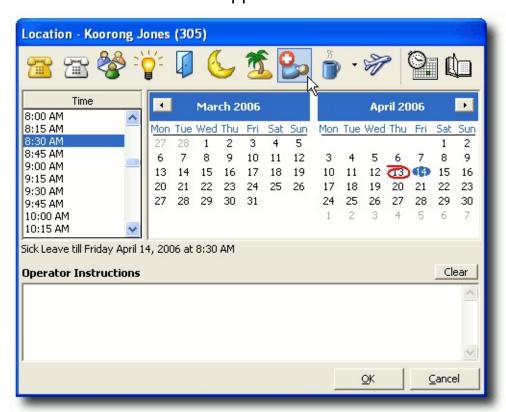
Calendar Functionality

Setting another extension's location using Outlook's Extension Shortcut Toolbar

If you have added a colleague's extension to your <u>Extension Shortcut Toolbar</u>, you can use that shortcut to change your colleague's location:



1. Press and hold the CTRL key on your keyboard, and click on the Shortcut button for the extension whose location you wish to change: The Location screen will appear:



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

See Also

Setting another extension's location

Setting another extension's location in Outlook using the Directory

Setting a location for multiple extensions with Outlook

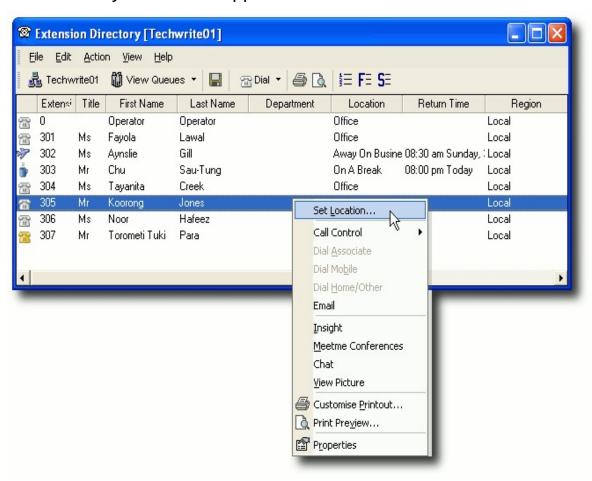
Setting another extension's location in Outlook using the Directory

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

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

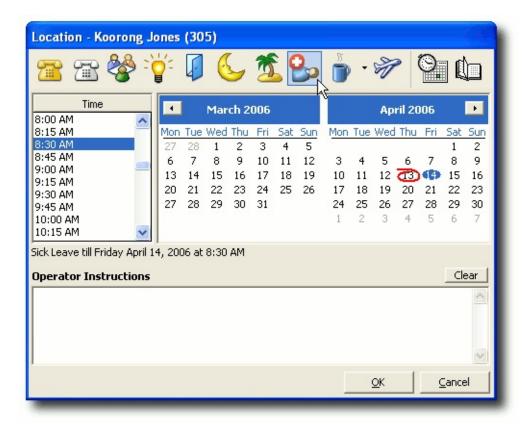


The Directory screen will appear:



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

The Location screen will appear:



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

See Also

Setting another extension's location

<u>Setting another extension's location using Outlook's Extension Shortcut Toolbar</u>

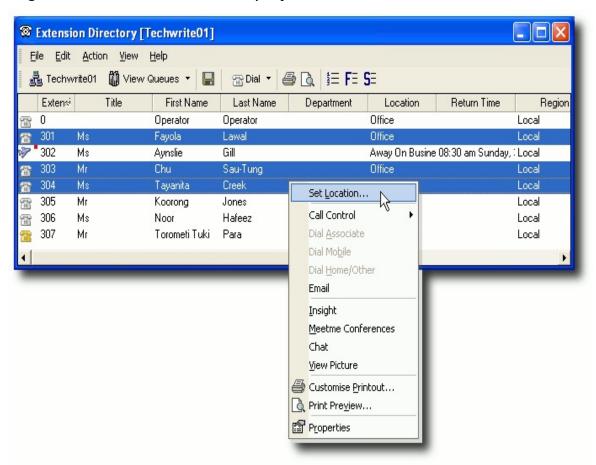
Setting a location for multiple extensions with Outlook

Setting a location for multiple extensions with Outlook

You can set multiple extensions to the same location using the Directory. Click on the Directory button:

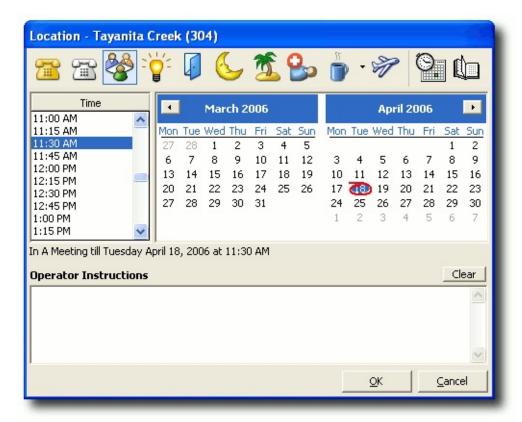


- 1. Hold down the CTRL key and click on the extensions whose locations you wish to change.
- 2. Right click on selection to display the shortcut menu:



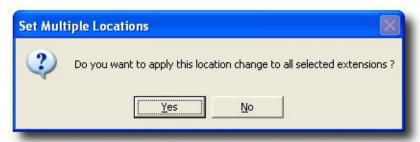
3. Select Set Location...

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



- 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.

See Also

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Setting another extension's location using Outlook's Extension Shortcut

Toolbar

Setting another extension's location in Outlook using the Directory

Operator Instructions

There may be times when you wish to provide members of your organization with more information about your whereabouts than a simple Location can convey. In these cases you can use Operator Instructions to supply additional information about your situation.

Operator Instructions are notes attached to your location profile. They can be read by all Clients in the network.

Examples of Operator Instructions:

- "Working from home today."
- "On-site at XYZ company. Can be reached on my mobile if urgent."
- "In Singapore all week. Jenny to handle the VIP account while I'm away."

Note: Operator Instructions do not expire automatically. When Operator Instructions are no longer relevant you should remove them manually.

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Entering and Editing Operator Instructions

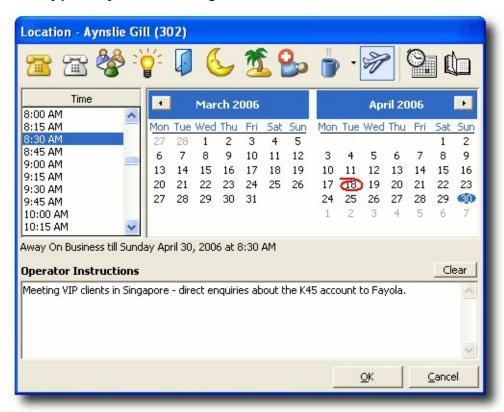
Viewing Operator Instructions

Calendar Functionality

Entering and Editing Operator Instructions

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

- 1. Open the Location screen for the extension whose Operator Instructions you wish to modify:
 - To open your own Location screen, click on the Location button in Outlook's Phone Control toolbar.
 - To open another extension's Location screen, open the Directory window by clicking on the Directory button in Outlook's Phone Control toolbar. In the Directory window, right-click on the extension whose Operator Instructions you want to modify and select Set Location...
- 2. Click inside the white text box below the words Operator Instructions and type in your message:



3. Click OK.

Operator Instructions

Viewing Operator Instructions

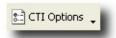
Viewing Operator Instructions

Operator Instructions for any extension can be read from that extension's <u>Location screen</u>.

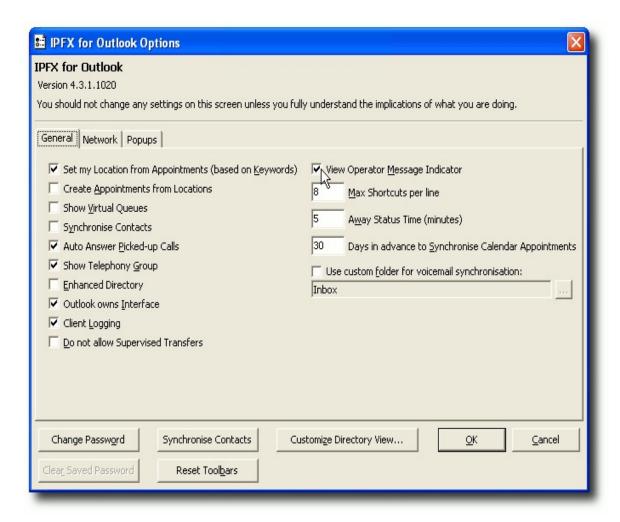
Operator Instructions can be also be read from the Directory.

To enable Operator Instructions to be viewed from the Directory:

1. Open the IPFX Options screen by clicking on the **CTI Options** button in Outlook's Phone Control Toolbar.



- 2. Click on the **General** tab of the IPFX for Outlook Options screen.
- 3. Check the box marked **View Operator Message Indicator**.

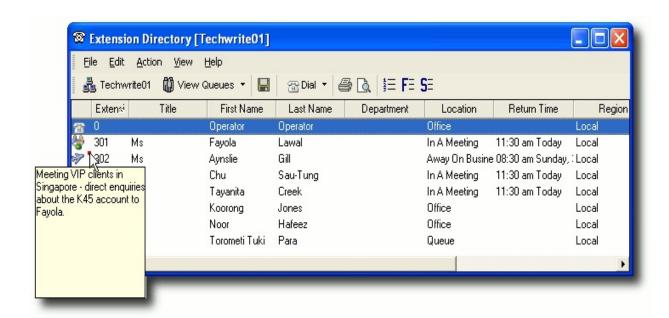


4. Click OK.

To view Operator instructions from the Directory:

A red dot to the right of an extension number indicates that Operator Instructions are available for that extension.

Rest the mouse pointer over the dot to read the Operator Instructions:



See Also

Operator Instructions

Entering and Editing Operator Instructions

Editing your Location settings in Outlook

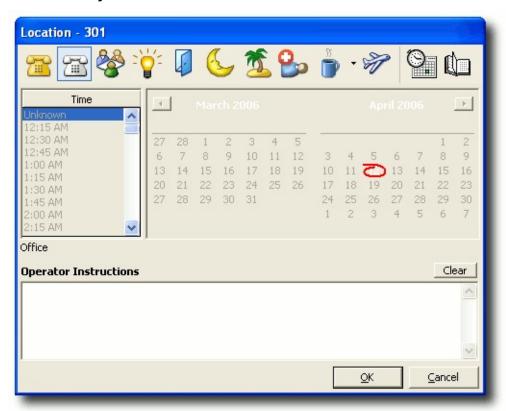
Location settings enable you to control how the IPFX system handles incoming calls.

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

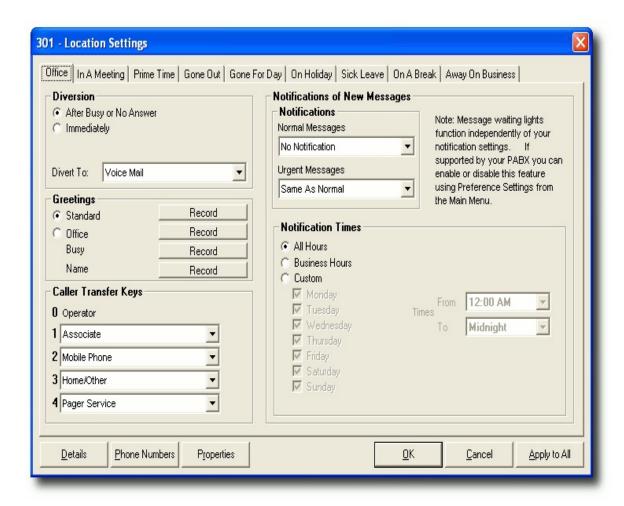


To edit your location settings:

1. Start from your location screen:



- 2. Click on the Settings icon: a.
- 3. The **Location Settings** screen appears:



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 Properties/Options tab. 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.



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:



- 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:



- 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:



All Hours (24 hours a day, 7 days a week)

8.00am to 5.30pm Monday to Friday

These can be changed to suit your business. You can also select your business

Business Hours

hours to adhere to the local time zone or the CTServer timezone, eq. Main

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.

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.

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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.

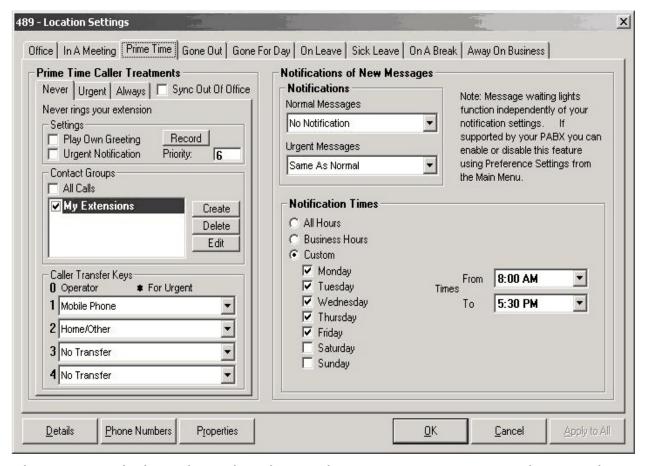
In order to take full advantage of this feature, you should create specific groups of callers into levels of priority. Then checking/unchecking them as required is very quick and efficient.

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:



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

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

Never tab

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

Urgent tab

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

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

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

Always tab

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



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

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

See Also

Editing your Location settings in Outlook

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 in Outlook

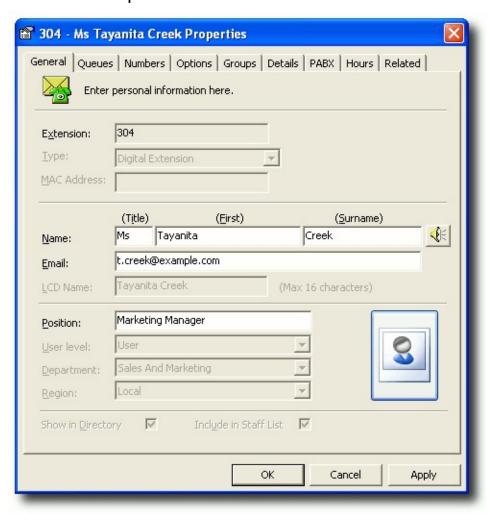
Prime Time Tab

Changing your extension's properties

Details Button



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



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

Name

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

Email

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

Voicemail messages to be sent to your email client.

Image

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

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

See Also

Changing your extension's properties

Setting up your mailbox phone numbers

Viewing Queue Properties

Properties

Groups Tab

Viewing Site Specific Details

PABX Tab

Hours

Related

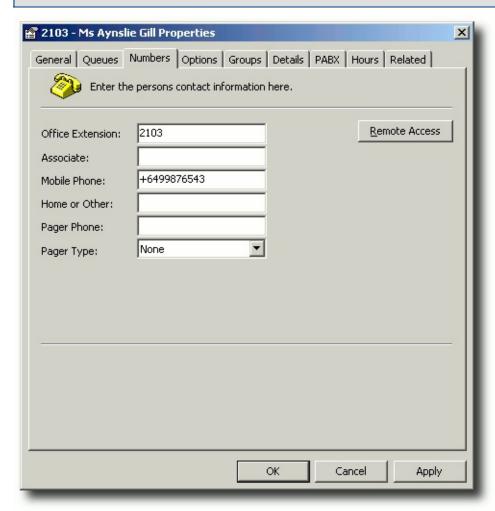
Setting up your mailbox phone numbers

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.

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



3. Edit your phone details as required.

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

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

See Also

Changing your extension's properties

Details Button

Viewing Queue Properties

Properties

Groups Tab

Viewing Site Specific Details

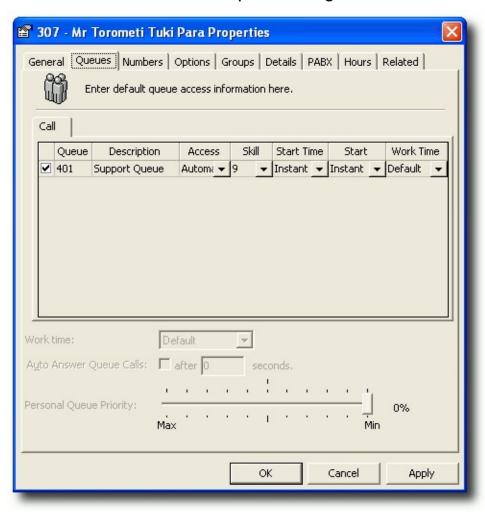
PABX Tab

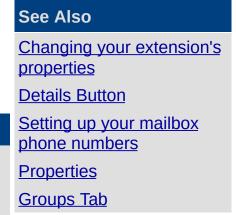
Hours

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.





In This Section

Changing Work Time
Auto Answer Queue Calls
Personal Queue Priority

Viewing Site Specific Details

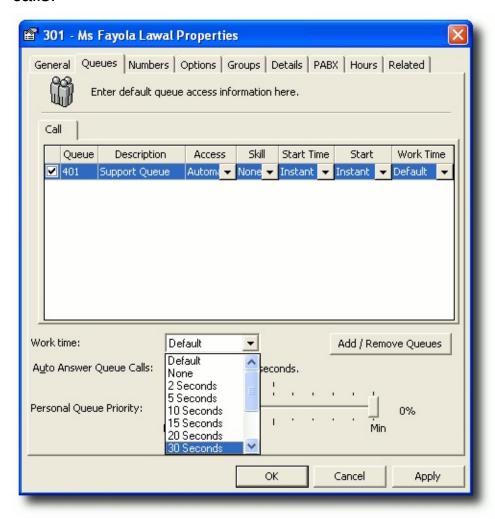
PABX Tab

<u>Hours</u>

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.



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

Properties

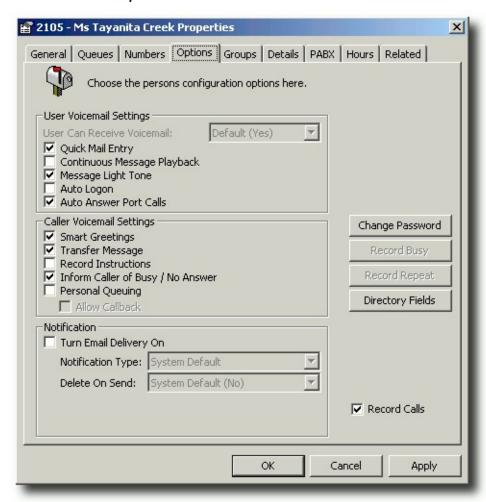


The *Properties* button on your Location screen is a shortcut to the Extension Properties Options tab.

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

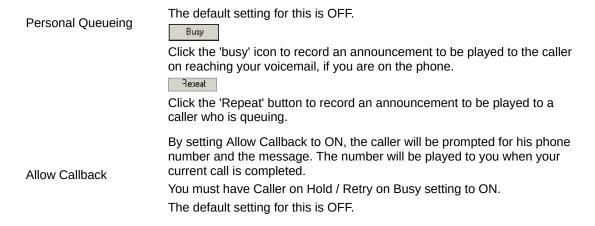
This Feature

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

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

Caller Voicemail Settings

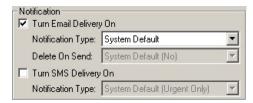
This Feature	Does This
Smart Greetings*	Smart Greetings will inform your caller where you are and your expected return time for all locations other than Office. i.e. 'I'm sorry, John Smith is in a meeting until 3pm' (then your own personal location greeting is played). If you do not use Smart Greetings,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



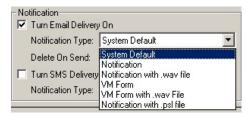
Note: For more information on the features marked with a *, please refer to your IPFX Voicemail (Phone only) User Guide.

Email

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



Select *Notification Type* from the drop-down menu.



System Default

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

Notification

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

Notification with .wav file

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

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

VM Form

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

VM Form with .wav file

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

Notification with .psl file

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

Delete on Send

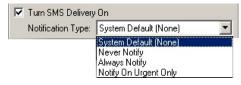
This is if you wish to delete the voicemail message on the voicemail mailbox when you have a rule set up to send it to another folder within your email client. Select from the drop-down menu. Yes/No. The Default is No.

SMS delivery

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

Check the Turn SMS Delivery On box.

Select Notification Type from the drop-down menu.



Change Password

Allows you to change your voicemail mailbox password.

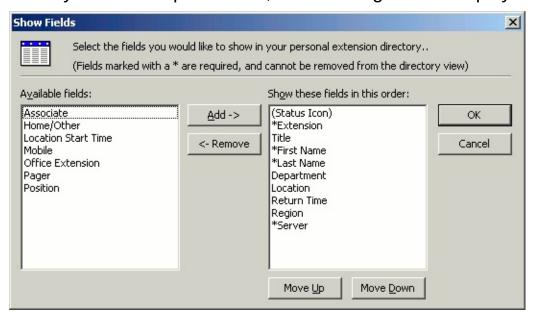
Directory Fields

■ Click on the Directory Fields button - Directory Fields

If you do not have sufficient access to modify your directory fields the following screen will display:



If you do have permission, the following screen displays:



- 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.



properties

Details Button

Setting up your mailbox

phone numbers

Viewing Queue Properties

Groups Tab

Viewing Site Specific

Details

PABX Tab

Hours

Related

Groups Tab

See Also

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

Details Button

Setting up your mailbox phone numbers

Viewing Queue Properties

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Viewing Site Specific

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Related

In This Section

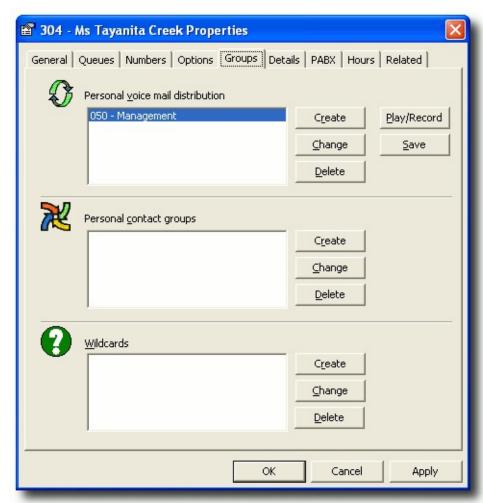
Personal Voicemail Distribution Groups

Personal Contact Groups

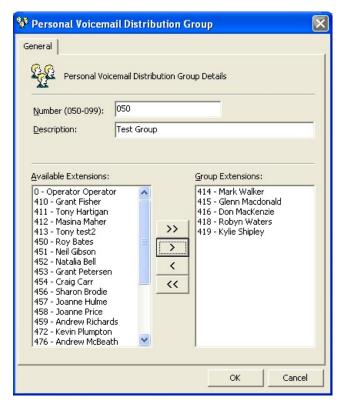
Personal Voicemail Distribution Groups

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

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



 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.



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 drop-down box.
- 3. Select/Highlight the Group Members you want to change from the Group Extensions.
- 4. Click the < (move) button to Add individual member/s to your Group, or
 - click the > (remove) button to Remove the individual member/s to your Group.
- 5. Click Apply.
- 6. Click OK.

To Delete A Personal Voicemail Distribution Group

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

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

See Also

Groups Tab

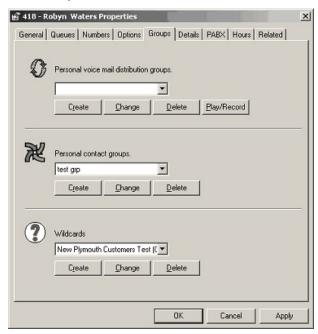
Personal Contact Groups

Personal Contact Groups

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

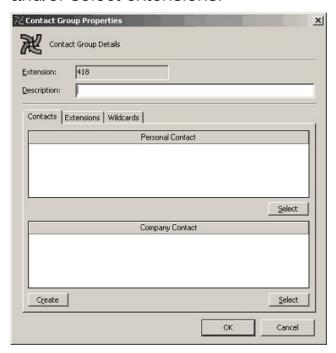
Note IPFX Administrator will see the Call Pickup Groups for an NEC PABX Platform under Personal Voicemail Distribution Groups.

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



- 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.



To Create a Personal Contact in Outlook

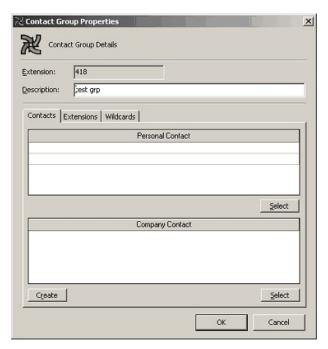
- Click Create to display the standard Outlook Contact screen.
- Enter relevant data for your contact as per your Microsoft Outlook user guide.

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.

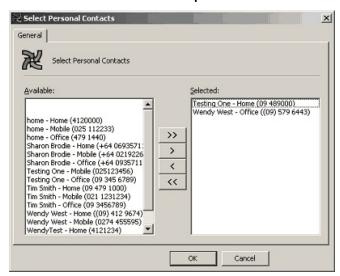
Click Change from the Properties Screen.

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



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

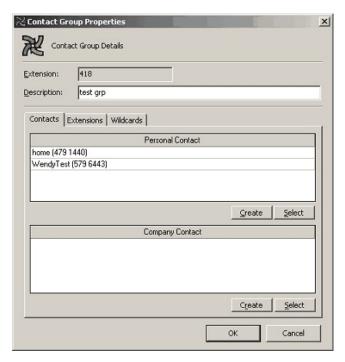
The **Select Personal Contacts** Screen displays showing existing contacts for that Group.



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.

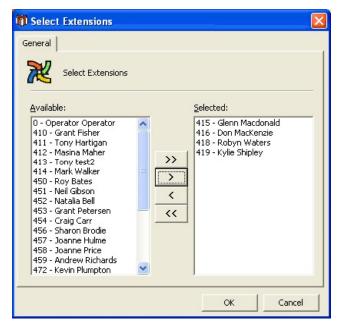


Adding Extensions to your Contact Group

Click the **Extensions** Tab from the Contact Group Properties screen. (The Screen below displays with the selected extensions for this group),



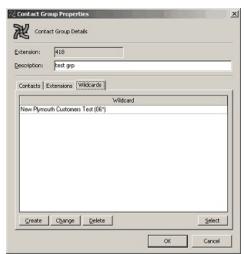
Click **Select** to Add/Remove extensions. The **Select Extensions** screen displays.



- 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.

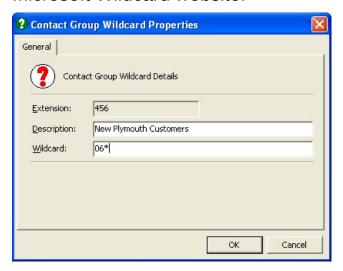


 Click Create to create a Wildcard to add to your Personal Contact Group.

The Contact Group Wildcard Properties Screen displays.

Enter the Description and Wildcard details as required.

For further information on Wildcard details, please refer to the Microsoft Wildcard website.

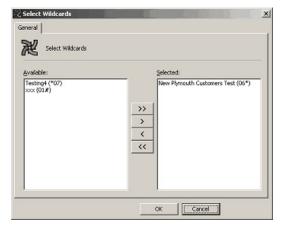


- Click OK.
- To Add an existing Wildcard to your Group

Click the Wildcards Tab from the Contact Group Properties screen.

Click the Select button.

The **Select Wildcards** screen displays.



- 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.

To Change The Members In A Personal Contact Group

- 1. Display the Properties Screen. Click the Groups Tab.
- 2. Select/Highlight the Group you want to change from the drop-down box of Personal Contact Groups.
- 3. Click Change.

The Contact Group Details screen displays.



- 4. Click Select.
- 5. Select/Highlight the Group Members you want to change from the Group Extensions.
- 6. Click the <> (move) buttons to Add/Remove individual member/s to and from your Group.
- 7. Click OK.

To Delete A Personal Contact Group

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

Note To Add all available Extensions to your Personal Contact Group click >> (Move All) button. To Remove all available Extensions from your

Personal Contact Group click << (Remove All) button. For more information on Personal Contact Groups, refer to your Voicemail User Guide.

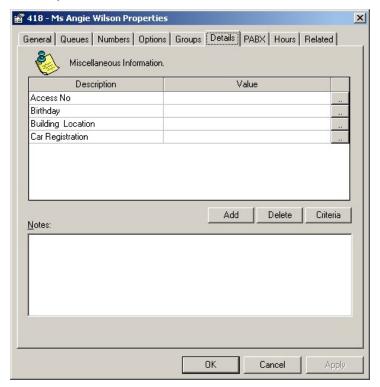
See Also

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.



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 icon 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

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PABX Tab



PBX Dependent Feature!

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



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.

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

Reset Extn

Changing your extension's properties

Details Button

Setting up your mailbox phone numbers

Viewing Queue Properties

Properties

Groups Tab

Viewing Site Specific

Details

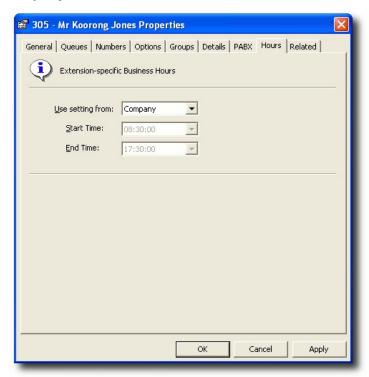
Hours

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.



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

Viewing Queue Properties

Properties

Groups Tab

Viewing Site Specific Details

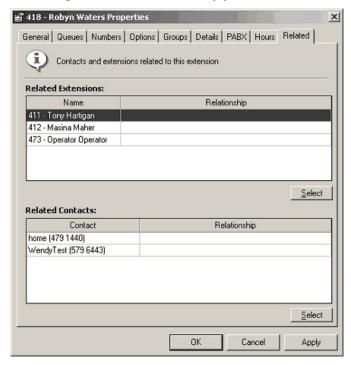
PABX Tab

Related

Related

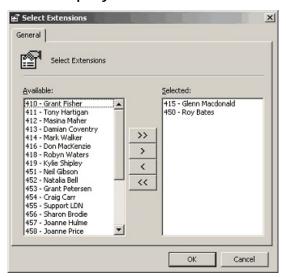
The Related Tab enables a user to detail any internal or external contacts that they wish to use for reference if they are not available to take a call.

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



Related Extensions

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

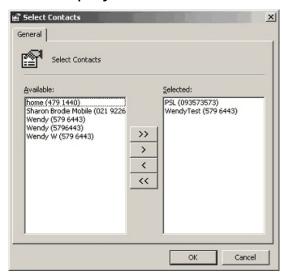


Use the Move buttons to Add/Remove extensions as required.

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

Viewing Queue Properties

Properties

Groups Tab

Viewing Site Specific Details

PABX Tab

Hours

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".

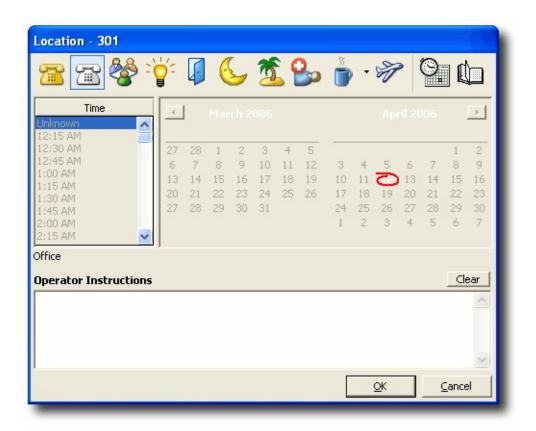
Example C: If Customer A and B call me between 2pm and 4pm then I want to play a specific message, but if they call at any other time of day, I will play the generic Location message.

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

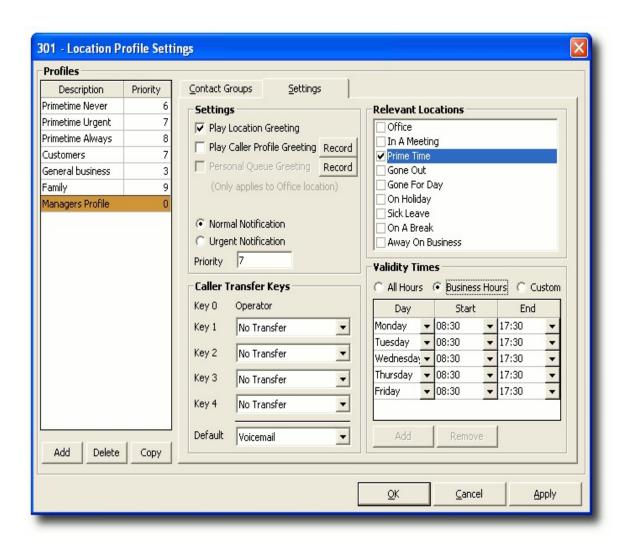
To view Call Profile Settings

1. Click the **Location** icon.

The Location screen will appear:



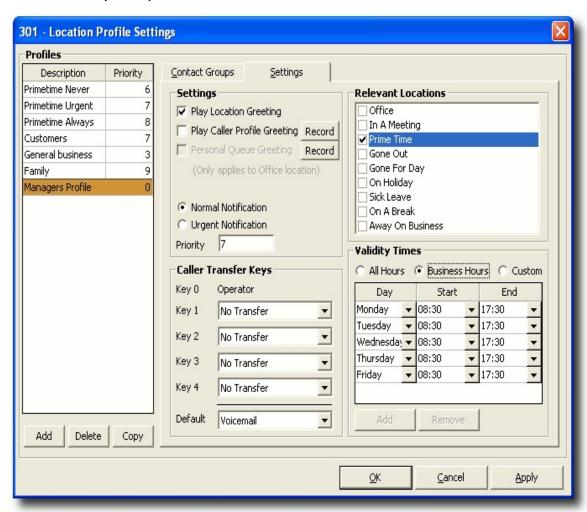
2. Click the Call Profiles button to open this screen:



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
- Click Add on the Location Profile Settings screen.
 You will be prompted to enter a name for the new Profile.



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.



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 <u>add or edit a Personal Contact Group</u>.

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

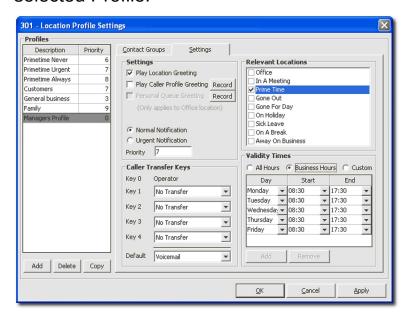
See Also

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.



Settings



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

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

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

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

(You must record an individual profile greeting).

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

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

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

Caller Transfer Keys

Caller Tr	ansfer Keys
Key 0	Operator
Key 1	No Transfer ▼
Key 2	No Transfer ▼
Key 3	No Transfer
Key 4	No Transfer
Default	Voicemail 🔻

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

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

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

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

Locations



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

Validity Times



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

IPFX MS Exchange Out of Office Assistant Integration

See Also

Using locations

What are locations?

<u>Locations and default</u> return times

Setting your location in IPFX for Outlook

Returning from a location

Setting another extension's location

Operator Instructions

Editing your Location settings in Outlook

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

Call Profiles

Calendar Functionality

In This Section

About IPFX Out of Office Assistant Integration

How to Set Up IPFX Out of Office Assistant Integration on your Client

About IPFX Out of Office Assistant Integration

"Sync Out Of Office" is a location-specific option.

With IPFX's Out of Office Assistant Integration, you can now integrate your Location status with the Microsoft Outlook Out of Office Assistant. This feature is configurable for each location and will automatically set the Out-of-Office Assistant on or off depending on the Location:

Location	Out-of-Office Assistant Status
Office, Queue	Off (in the office).
Any other Location	On ("I am currently out of the office").

Example Settings:

- "Sync Out of Office" is enabled for these Locations:
 Office, Queue, Gone Out, Gone for the Day, Holiday, Sick Leave and Away on Business.
- 2. "Sync Out of Office" is NOT enabled for these Locations: In a Meeting and Prime Time.

Note: The automatic enabling/disabling of the Out-of-Office Assistant may not be reflected in Microsoft Outlook through the Out-of-Office Assistant dialog (that is, you may have set your location to an "out of the office" Location but opening the Out-of-Office Assistant dialog does not indicate that the Assistant is turned ON). If you close and restart Outlook and the Out-of-Office Assistant is ON, you will be advised and offered the choice of turning it OFF.

Note: Manually turning the Out-of-Office Assistant OFF (that is by using Microsoft Outlook) will not return your Location to Office/Queue.

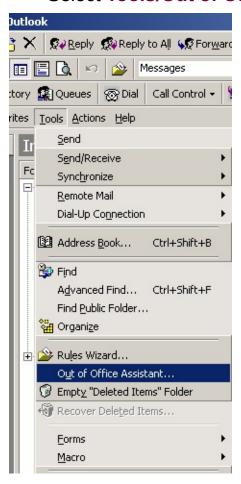
See Also IPFX MS Exchange Out of Office Assistant Integration How to Set Up IPFX Out of Office Assistant Integration

on your Client

How to Set Up IPFX Out of Office Assistant Integration on your Client

Step 1 - From the 'Outlook' Screen

Select Tools/Out of Office Assistant



■ The screen below displays.

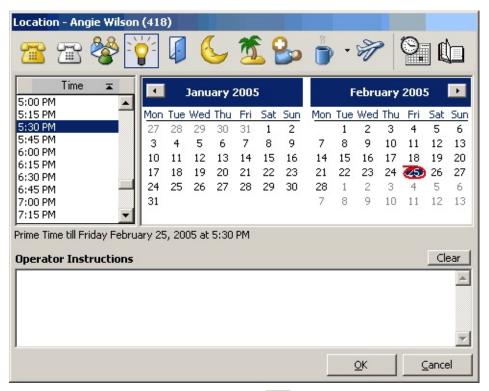


- The IPFX Server controls when the 'In the Office' or 'Out of the Office' items above are selected, so there is no need to check or uncheck these boxes manually.
- Enter message in 'AutoReply only once to each sender with the following text:' window along with any Rules and/or Conditions you require. This will be handled as normal by Microsoft Outlook.
- Click OK.

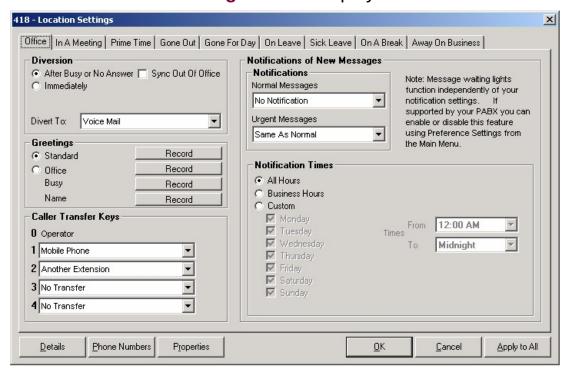
Note If you do not wish for the Out of Office Assistant to be activated, you will have to turn this off manually, by selecting the "I am currently In the Office' checkbox. Please note that if you change to another location, this will be automatically activated again.

 Step 2 - Click the 'Location' button on the Toolbar to display the Location screen





- Click the Settings button at the top right of the screen.
- The **Location Settings** screen displays.



- Check the **Sync Out of Office** Box (checked means Active).
- Click OK.

The **Out of Office Assistant Synchronization** is now set up.

Note This facility is only available if the IPFX Out of Office Assistant Integration Module has been installed. If so, it is available on all locations In a Meeting, Gone Out, On Holiday, etc.

Note: The automatic enabling/disabling of the Out-of-Office Assistant may not be reflected in Microsoft Outlook through the Out-of-Office Assistant dialog (that is, you may have set your location to an "out of the office" Location but opening the Out-of-Office Assistant dialog does not indicate that the Assistant is turned ON). If you close and restart Outlook and the Out-of-Office Assistant is ON, you will be advised and offered the choice of turning it OFF.

Note: Manually turning the Out-of-Office Assistant OFF (that is by using Microsoft Outlook) will not return your Location to Office/Queue.

See Also

IPFX MS Exchange Out of Office Assistant Integration
About IPFX Out of Office Assistant Integration

Calendar Functionality

Your Voicemail Locations function is linked to your Microsoft Outlook (personal) 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"

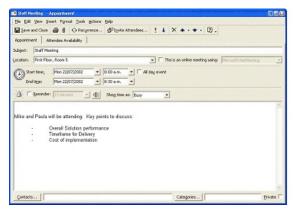
"Sick"

"On a break"

"Away on business"

Note These key words are NOT case sensitive.

Please note that your Location will **NOT** be set if you use the **Show time as** field instead of the *subject* or *location* fields. The **Show time as** field is not relevant to the Calendar Functionality.



The word "Meeting" in the Subject line will trigger your location to change to "In a Meeting" at the start time specified

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

See Also

Using locations

What are locations?

Locations and default return times

Setting your location in IPFX for Outlook

Returning from a location

Setting another extension's location

Operator Instructions

Editing your Location settings in Outlook

Changing your extension's properties

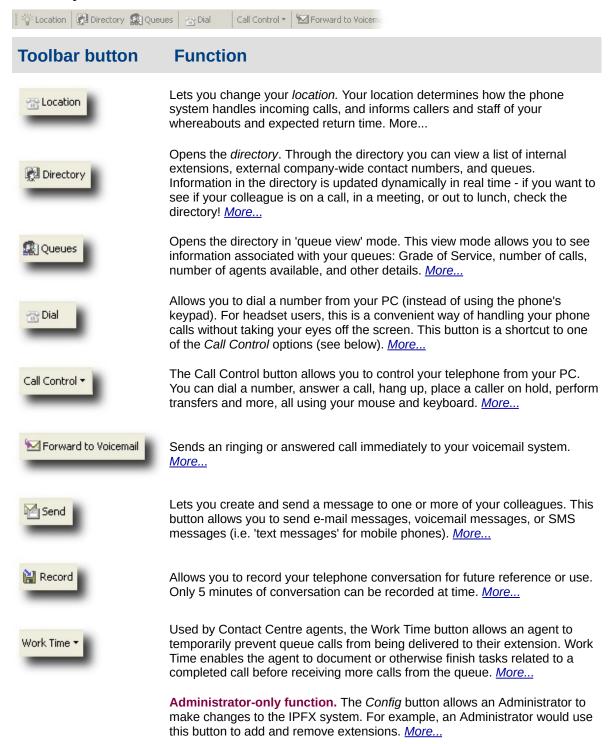
Call Profiles

IPFX MS Exchange Out of Office Assistant Integration

IPFX Phone Control Toolbar

Once you have launched your email client and entered your password, you will see the following addition to your email client's Toolbar.

This is your IPFX Phone Control Toolbar:







Administrator-only function. Allows an Administrator to obtain comprehensive and flexible reports about all telephone and IPFX Contact Centre activities. *More...*



Allows you to change the way that IPFX interacts with your Client. More...

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

Insight - Viewing Extension Details and Appointments

Conferencing

Chat

Setting a Callback

Send an Email message from the Directory

SMS

View Extension Images

Customized Printout

Print Preview

Extension Properties

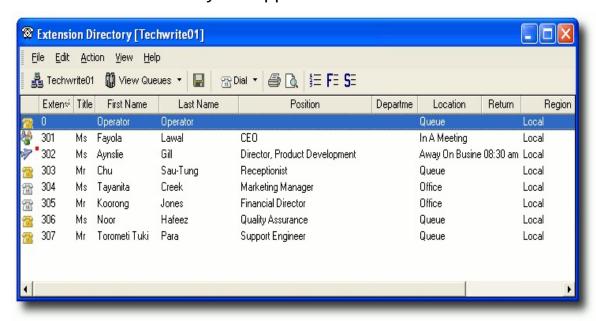
Filtering the Directory

Directory Integration

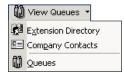
Dialing from your Directory Listing

To dial from your Directory Listing

Click on the Directory button on the IPFX Phone Control Toolbar.
The Extension Directory will appear:



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.

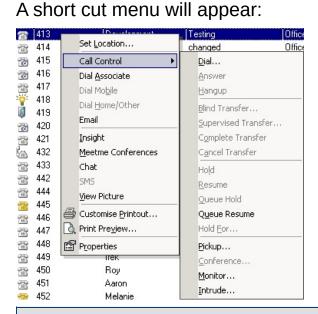
Then

- 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.



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

Insight - Viewing Extension Details and Appointments

Conferencing

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Setting a Callback

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Extension Properties

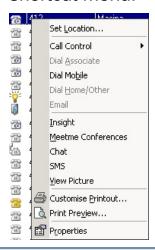
Filtering the Directory Directory Integration

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

Insight - Viewing Extension Details and Appointments

Conferencing

Chat

Setting a Callback

Send an Email message from the Directory

<u>SMS</u>

View Extension Images

Customized Printout

Print Preview

Extension Properties

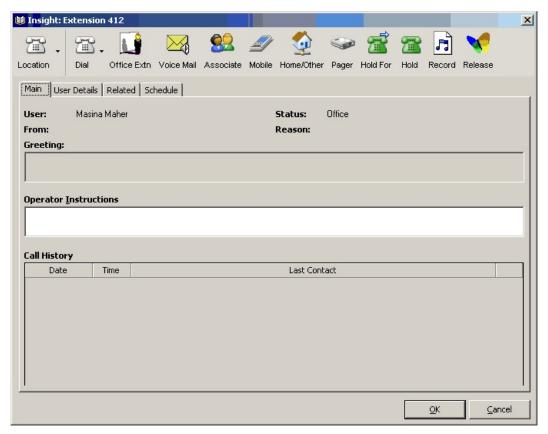
Filtering the Directory

Directory Integration

Insight - Viewing Extension Details and Appointments

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

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



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

When the Operator answers the call, the staff member's Insight screen appears on the console. The Operator can immediately see any Operator Instructions left by the staff member. With this information the Operator is

better equipped to deal with the customer's call.

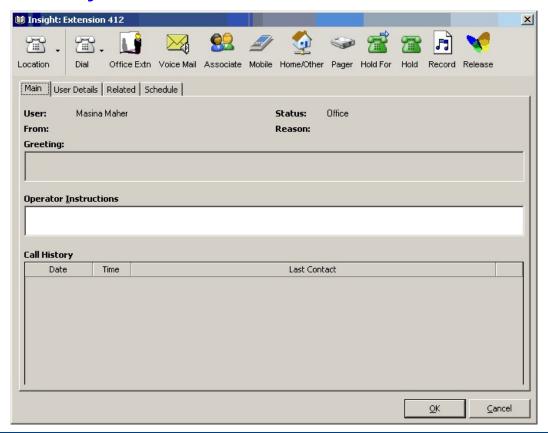
Note Email, Chat and LCD messaging are only available on the IPFX for NEC platform.

Functionality from the top toolbar

- The Location can be changed from this point.
- Full Call Control is available (see *Call Control* (see "<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:

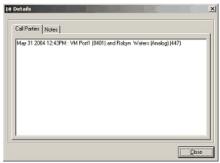


Note Above is an example of the IPFX Insight screen.

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

This will display the details screen as shown below.

Call History



This is only visible when on a live call.

See Also

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

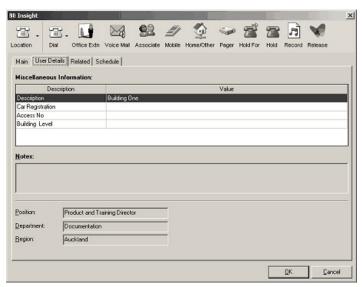
Viewing User Tab of Insight

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

Viewing Schedule Tab of Insight

Viewing User Tab of Insight

Functionality within the User Tab



This Feature

Does This

Miscellaneous Information Shows miscellaneous information from the Details tab of the user's $% \left(1\right) =\left(1\right) \left(1\right)$

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

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

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

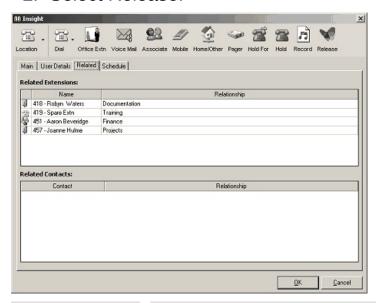
This shows any Internal and/or External Relationships the User has put in place, eg: who the user specifies as the Technical Advisor, Administration Contact, Secretary, Accountant, etc.

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

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



This Feature	Does This
Related Extension Name	Internal Extension Number and Name of the Relationship Contact.
Related Extension Relationship	How this person relates to the extension's position and why the Operator/Agent can contact this person in your absence.
Related Contacts	Contact Description of an External Contact.
Related Contact Relationship	How this contact relates to the extension's position and why the Operator/Agent can contact this person in the extension's absence.

See Also

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

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

Viewing User Tab of Insight

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

Viewing Schedule Tab of Insight

Functionality within the Schedule Tab



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

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

See Also Insight - Viewing Extension Details and Appointments Viewing Main Tab of Insight Viewing User Tab of Insight Viewing Related Tab of

Insight

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?

<u>Dialing from your Directory</u> <u>Listing</u>

<u>Dialling Other Available</u> <u>Numbers</u>

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

Chat

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Send an Email message from the Directory

SMS

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Extension Properties

Filtering the Directory

Directory Integration

In This Section

Meet Me Conferences

Meet Me Conferences



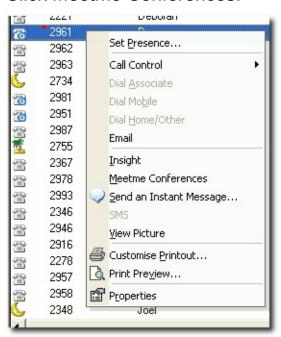
PBX Dependent Feature!

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

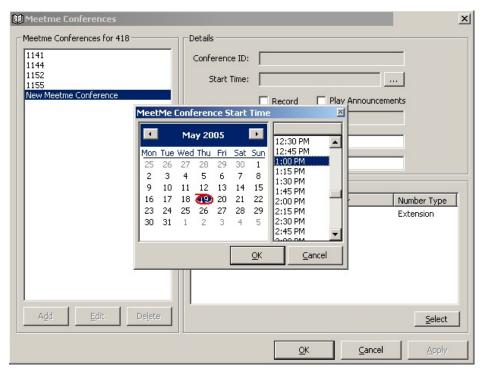
- Call users to Conference them in at the date/time specified, or
- Allow users to call into the Conference with a password.

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.

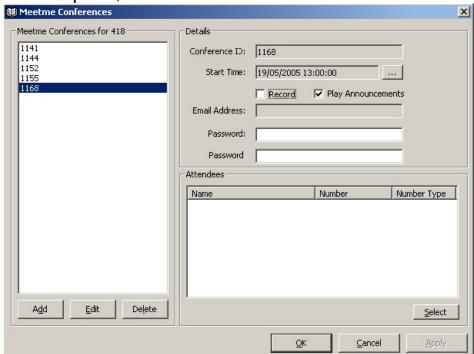


- Click Add from the Screen to add a Conference setting.
- Name your Conference.

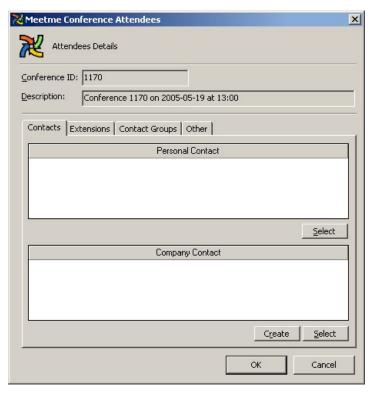


 Select the date and time you would like your Conference time from the Popup calendar.

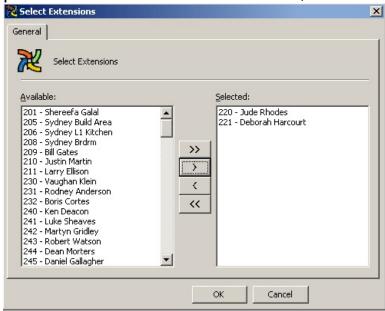
It will automatically enter a new Meet Me Conference ID in the left window pane, i.e.



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



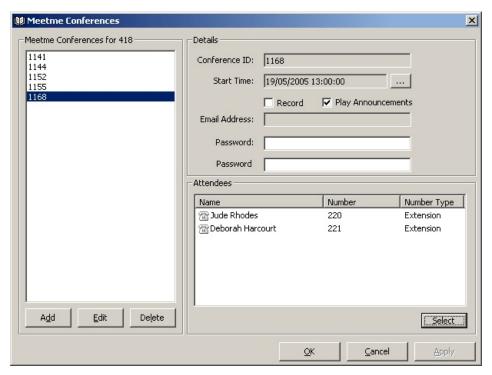
- You can click Create to create a new contact as an Attendee (or select from your existing Personal or Company Contacts).
- If you want to invite an existing contact (this example is using the Extensions tab), highlight the name(s) of the Attendees and click the > arrow to select them. This will populate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



• This screen appears:



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



• 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

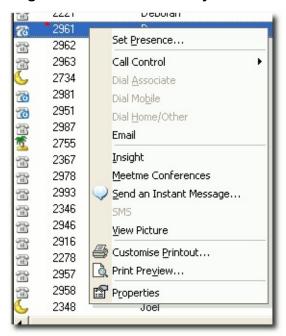
Conferencing

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



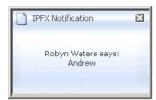
Click Chat.

The screen below displays.





- 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.

See Also Directory What is the Directory?

Dialing from your Directory Listing

Dialling Other Available Numbers

Insight - Viewing Extension Details and Appointments

Conferencing

Setting a Callback

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Print Preview

Extension Properties

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.



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

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Dialing from your Directory Listing

Dialling Other Available Numbers

Insight - Viewing Extension Details and Appointments

Conferencing

Chat

Send an Email message from the Directory

SMS

View Extension Images

Customized Printout

Print Preview

Extension Properties

Filtering the Directory

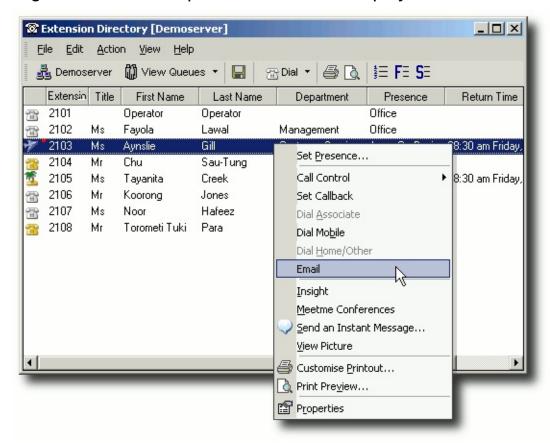
Directory Integration

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.

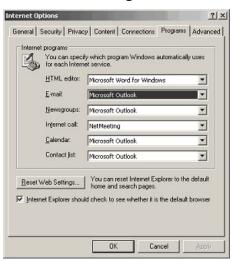
Note: In the IPFX Console client the 'Enable Directory Context Menu' in the Configuration\Settings Tab must be turned on.

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

Insight - Viewing Extension Details and Appointments

Conferencing

Chat

Setting a Callback

SMS

View Extension Images

Customized Printout

Print Preview

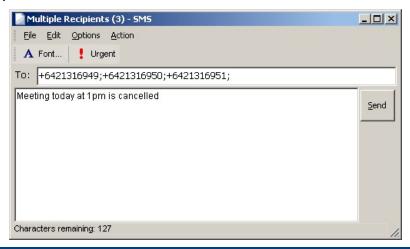
Extension Properties

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:



See Also

Directory

What is the Directory?

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Insight - Viewing Extension Details and Appointments

Conferencing

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Setting a Callback

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View Extension Images

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Extension Properties

Filtering the Directory

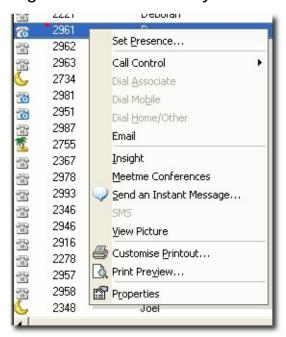
Directory Integration

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

Directory

What is the Directory?

Dialing from your Directory Listing

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Insight - Viewing Extension Details and Appointments

Conferencing

Chat

Setting a Callback

Send an Email message from the Directory

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Customized Printout

Print Preview

Extension Properties

Filtering the Directory

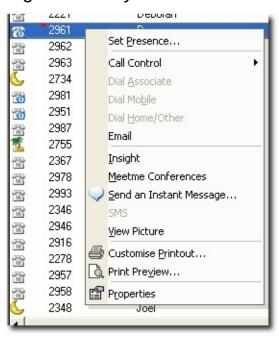
Directory Integration

Customized Printout

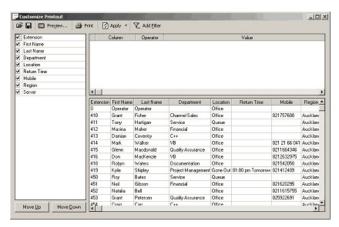
Customized Printout allows you to print out a Directory List and format as per your requirements.

To Customize a Directory Printout

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



Select Customize Printout...

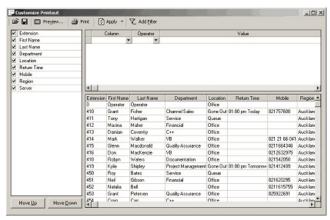


- This screen allows you to select the fields you wish to display in your printout by selecting the checkbox beside the field name.
- Make your selection and click Apply.

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.

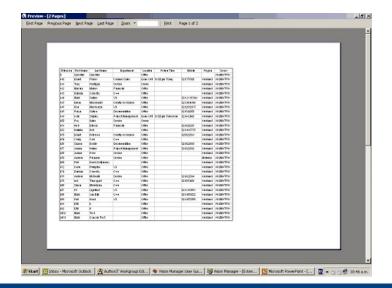
To Add a Filter to your Customized Printout

- 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.



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

Does This
Selects the first page of your printout
Selects the previous page of your printout
Selects the next page of your printout
Selects the last page of your printout
Selection to increase/decrease view
This is the printer selection to your organization network printers
Details the page numbers and what page you are on within the printout



See Also

Directory

What is the Directory?

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Filtering the Directory

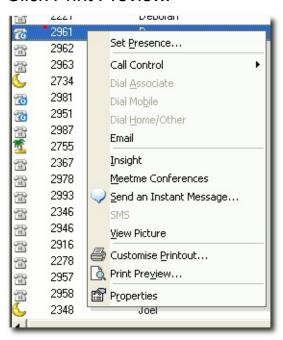
Directory Integration

Print Preview

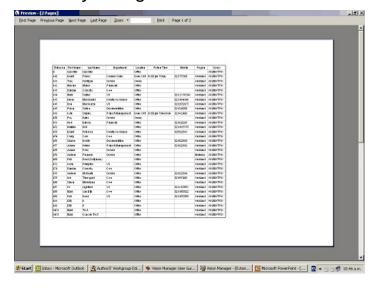
Print preview takes you to a default view of the Directory printout.

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.



See Also

Directory

What is the Directory?

<u>Dialing from your Directory</u> <u>Listing</u>

<u>Dialling Other Available</u> Numbers

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

Conferencing

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Setting a Callback

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Extension Properties

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Directory Integration

In This Section

<u>Icons on the Main toolbar</u> & 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

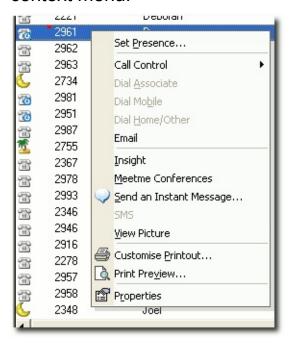
See Also

Print Preview

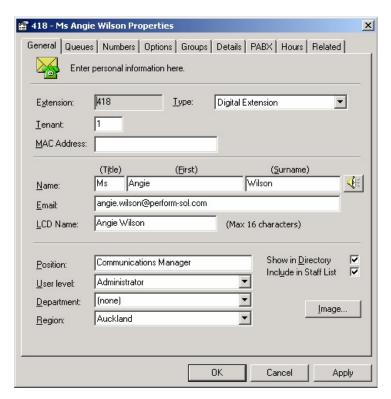
Extension Properties

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.



- 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?

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Insight - Viewing Extension Details and Appointments

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Setting a Callback

Send an Email message from the Directory

<u>SMS</u>

View Extension Images

Customized Printout

Print Preview

Filtering the Directory

Directory Integration

Filtering the Directory

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

To Filter an Extension

- 1. Right-click on the heading of the column that contains the information you wish to filter.
- 2. From the context menu, select the characteristic of the extensions you wish to display:



3. The directory will only display extensions matching the characteristic you have selected.

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

To Remove Filters

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

See Also

Directory

What is the Directory?

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Customized Printout

<u>Print Preview</u>

Extension Properties

Directory Integration

Directory Integration

To view the directory integration with Microsoft Outlook 2000 onwards

- 1. Select File from the Directory Menu
- Select New

You will be presented with options which will enable you to utilize the Microsoft Outlook tools. For further information on Microsoft Outlook tools, please refer to Microsoft.



Note: These options are also available from your Popup Screen. Click the Contact button on the Popup screen to display the same menu. If you have Enhanced Directory selected so that your Directory populates withir Outlook, this feature is not available as you are already within Outlook.

See Also

Directory

What is the Directory?

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Insight - Viewing Extension Details and Appointments

Conferencing

<u>Chat</u>

Setting a Callback

Send an Email message from the Directory

<u>SMS</u>

View Extension Images

Customized Printout

Print Preview

Extension Properties

Filtering the Directory

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

Viewing Queues

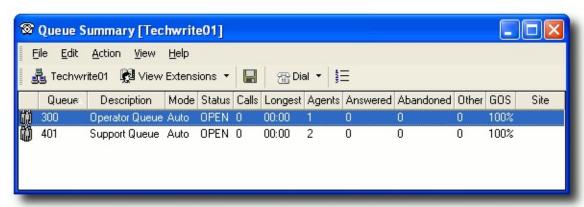
The IPFX Contact Centre module must be purchased for this to be available. This icon is not available on IPFX Call Centre Express for users (only IPFX Supervisor Agent/IPFX Administrators).

To view Queues

Click the **Queues** icon on the IPFX Toolbar.



The Queue Summary screen will appear:



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 gueue 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

Queues

What is a Queue?

Viewing Queue Agents and Call Flow

Viewing Queue Calls

Queue Pickup

Last Agent to Log out of Queue Notification

Queue Hold

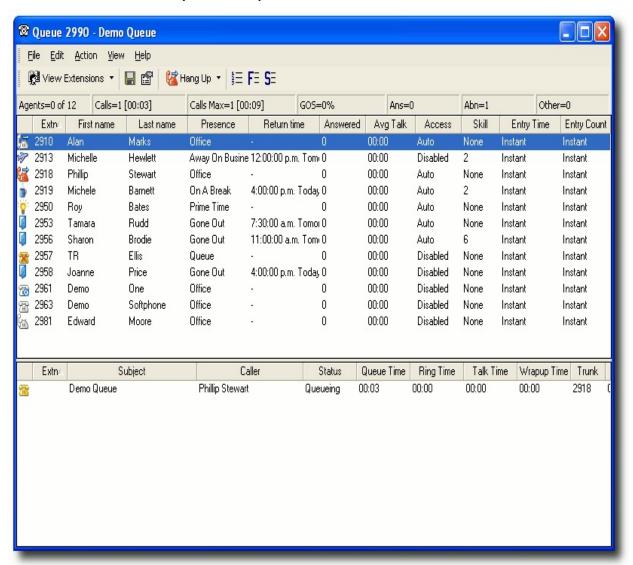
Queue Control

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.



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.

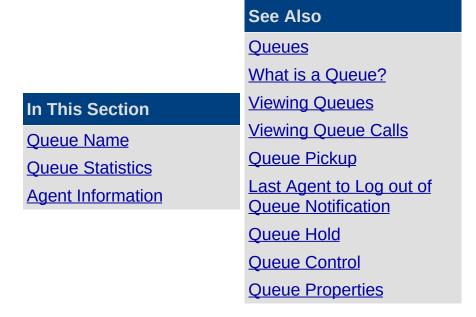
To View Queues, Extensions or the Company Directory from within the Queues Directory

Click View Extensions from the Top Toolbar.

Select the Directory you wish to view.



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



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

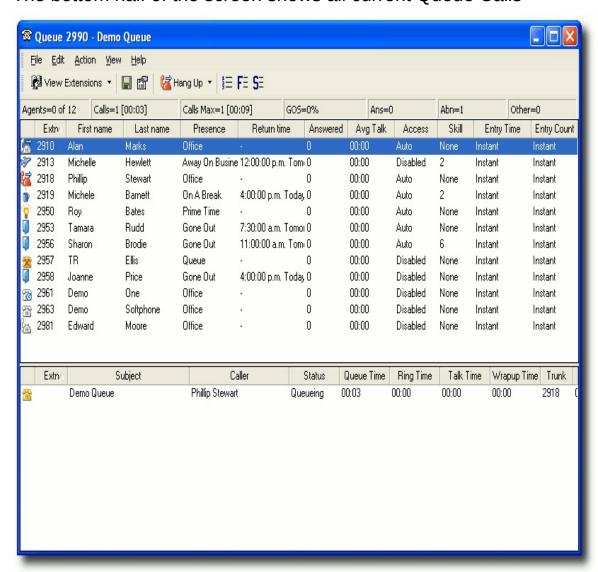
Queue Name

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.
- Double click the queue you want to view.The bottom half of the screen shows all current Queue Calls



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

Queue Calls

Document Queuing

How a Callback presents itself to an Agent

See Also

Queues

What is a Oueue?

Viewing Queues

Viewing Queue Agents and

Call Flow

Queue Pickup

Last Agent to Log out of

Queue Notification

Queue Hold

Queue Control

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.

Type

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

See Also

Viewing Queue Calls

Document Queuing

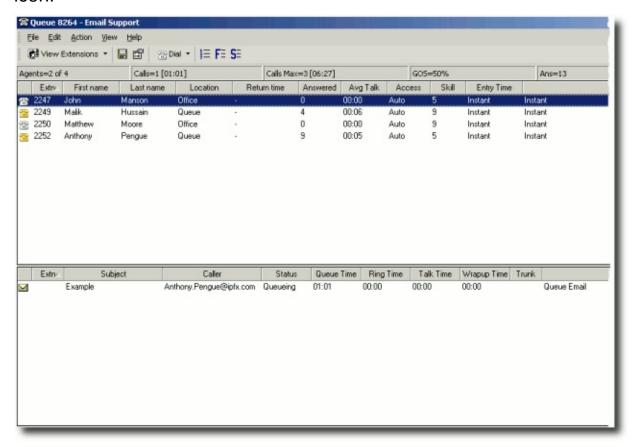
How a Callback presents itself to an Agent

Document Queuing

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

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

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



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

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

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

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

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

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

See Also

Viewing Queue Calls

Queue Calls

How a Callback presents itself to an Agent

How a Callback presents itself to an Agent

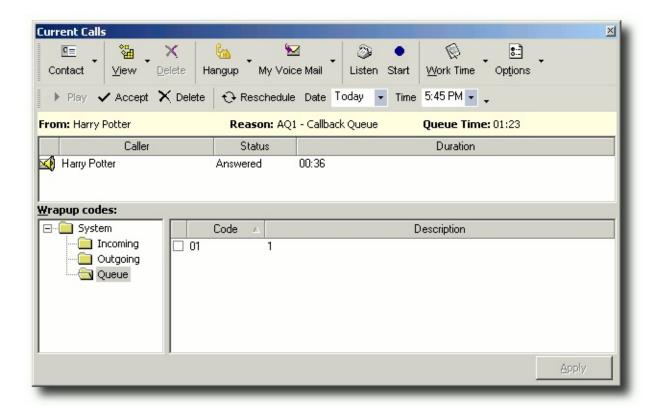
This is an Additional Module

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.



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
- 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

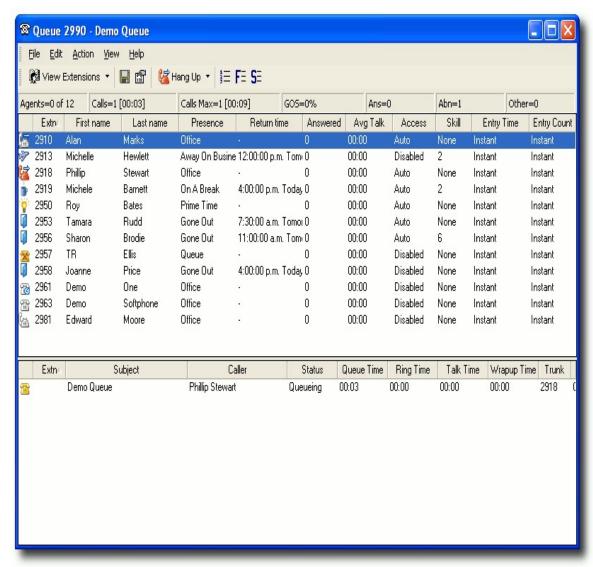
Document Queuing

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.



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

Last Agent to Log out of Queue Notification

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



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

See Also

Queues

What is a Queue?

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Viewing Queue Calls

Queue Pickup

Queue Hold

Queue Control

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?

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Viewing Queue Agents and Call Flow

Viewing Queue Calls

Queue Pickup

Last Agent to Log out of Queue Notification

Queue Control

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

Right-click on the required queue from the Queue directory window.
 The shortcut menu will appear:



2. Click Queue Control.

The Queue Control options will appear.



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?

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Viewing Queue Calls

Queue Pickup

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Queue Hold

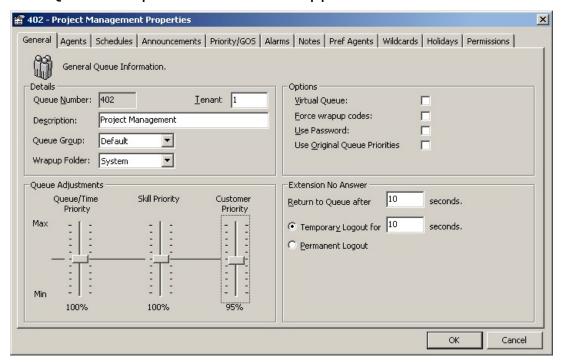
Queue Properties

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

- Right-click on the required queue.
 The shortcut menu will appear.
- 2. Click Properties...

The Queue Properties screen will appear:



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

See Also

<u>Queues</u>

What is a Queue?

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Viewing Queue Agents and Call Flow

Viewing Queue Calls

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Last Agent to Log out of Queue Notification

Queue Hold

Queue Control

Dial

Gives you the ability to control your telephone from your PC. For headset users, this is a convenient way of handling your phone calls without taking your eyes from your screen.

See Also

IPFX Phone Control Toolbar

Directory

Queues

Call Control

Forward to Voicemail

Send a message

Record

Work Time

Config

Reports

CTI Options

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).
- 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.

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

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

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



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



or

1. Click on the Dial Icon.

The Dial screen will appear:



- 2. 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.



Contacts

Displaying the Outlook
Contact Name within the
Screen Pop

Hold

Resume

Queue Hold

Queue Resume

Hold For

Pickup

Monitor

<u>Intrude</u>

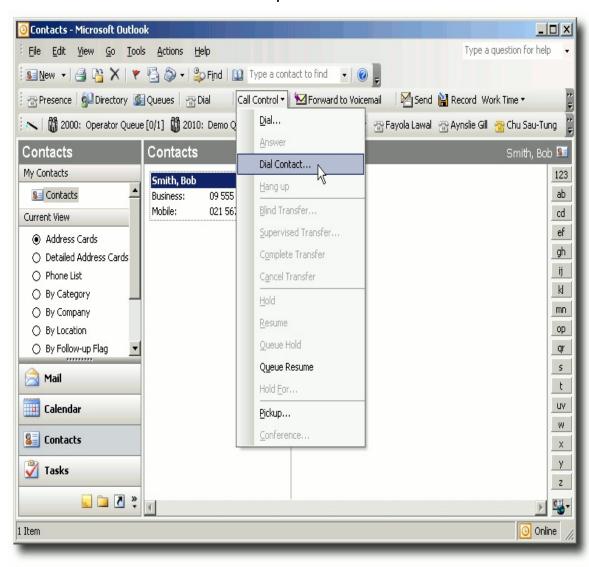
Dialing from your Outlook Contacts

IPFX for Outlook supports dialing numbers directly from your Microsoft Outlook Contacts screen.

To dial a number from the Microsoft Outlook Contacts screen

Method 1

- 1. Highlight the Contact you want to call and click the **Call Control** button on the top 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.

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

Method 2

- 1. Highlight the required contact.
- 2. Click the **Dial** button on the Toolbar.
- 3. Select from the drop-down box and Click **Dial**.

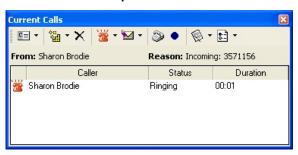
See Also

Dial/Making an Outbound Call

Displaying the Outlook Contact Name within the Screen Pop

Displaying the Outlook Contact Name within the Screen Pop

When someone calls your extension from an outside line, if the Calling Line ID (CLI) is in your Outlook Contacts the Contact Name/Description will display within your Screen Pop instead of the CLI as below:

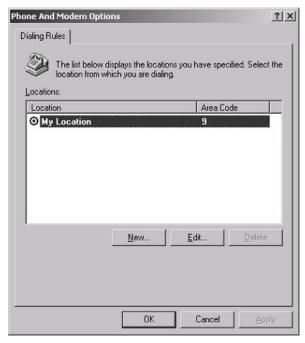


To ensure this can take place you will need to set your Location Settings correctly. To do this:

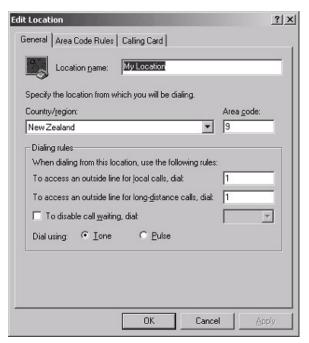
- 1. Select Tools from your main Outlook Menu.
- 2. Select Dial Up Connection from the Tools Menu.
- 3. Select Location Settings.



4. Set the Phone and Modem Options by selecting Edit.



- 5. Ensure that your Country/Region is set correctly. e.g. 9 for Auckland.
- 6. Enter the appropriate digit for access to outside lines for local and long distance calls.
- 7. Ensure that Tone Dial is set.



8. Click OK.

Within your Outlook Contacts ensure your numbers are entered correctly as follows:

- 1. When entering number do not enter other characters, e.g. brackets or dashes (,), , or spaces. If Outlook formatting puts these in after you have entered the number, this is OK.
- 2. Each User's Outlook can have different formatting options.

If your Outlook formats the number into International format, ensure you do not have the '0' in from of the access code. i.e. + 64 (9) 3573573.

If Outlook does not format the number into International format, ensure you have the '0' in from of the access code i.e. (09) 3573573

See Also

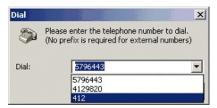
Dial/Making an Outbound Call

Dialing from your Outlook Contacts

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

Cancel Transfer

Hold

Resume

Queue Hold

Queue Resume

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

Answering a Call

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



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

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

Recently Dialled Numbers

Hangup/Completing a Call

Transferring a Call

Cancel Transfer

Hold

Resume

Queue Hold

Queue Resume

Hold For

Pickup

Monitor

<u>Intrude</u>

Hangup/Completing a Call

To hangup/complete a call

• Click on the Hang up button.



The call is now terminated.

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



See Also

Call Control

Dial/Making an Outbound Call

Recently Dialled Numbers

Answering a Call

Transferring a Call

Cancel Transfer

Hold

Resume

Queue Hold

Queue Resume

Hold For

Pickup

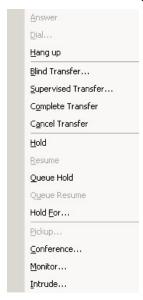
Monitor

<u>Intrude</u>

Transferring a Call

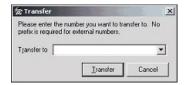
To transfer a call

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



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.



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

Cancel Transfer

Hold

Resume

Queue Hold

Queue Resume

Hold For

Pickup

Monitor

<u>Intrude</u>

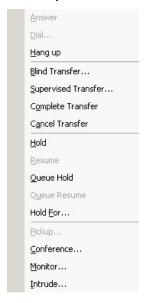
In This Section

Complete Transfer

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.



Click Complete Transfer to complete the transfer.

See Also

Transferring a Call

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

Hold

Resume

Queue Hold

Queue Resume

Hold For

Pickup

Monitor

Intrude

Hold

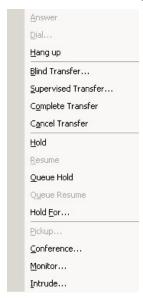
The Hold function allows you to put a caller on Hold from within the Call Control button. When putting a caller on Hold, it will be displayed as a green phone.

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

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

To put a caller On Hold

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



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

See Also

Call Control

Dial/Making an Outbound Call

Recently Dialled Numbers

Answering a Call

Hangup/Completing a Call

Transferring a Call

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

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

Cancel Transfer

Hold

Queue Hold

Queue Resume

Hold For

Pickup

Monitor

Intrude

Queue Hold

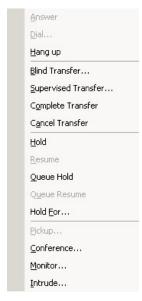
The **Queue Hold** function allows you to put a caller on Queue Hold via the IPFX application - this will leave your extension free to make and receive calls.

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

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

To put a caller On Queue Hold

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



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

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

Cancel Transfer

Hold

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Queue Hold

Hold For

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Monitor

Intrude

Hold For

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

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

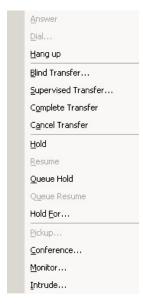
This function will move the call to the personal queue of the extension they are holding for. It will be visible within that extension's Popup Screen.

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

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

To put a caller on Hold For

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



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

Cancel Transfer

Hold

Resume

Queue Hold

Queue Resume

<u>Pickup</u>

Monitor

<u>Intrude</u>

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...



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

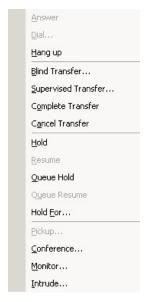
Answering a Call

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

Monitor

To Monitor the conversation of another party

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



The Monitor screen displays.



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

Cancel Transfer

Hold

Resume

Queue Hold

Queue Resume

Hold For

<u>Pickup</u>

<u>Intrude</u>

Intrude

Note This feature requires IPFX Administrator privileges.

To Intrude on a call

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



The Intrude screen displays.



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

Cancel Transfer

Hold

Resume

Queue Hold

Queue Resume

Hold For

<u>Pickup</u>

Monitor

Forward to Voicemail

Sends an incoming call to voicemail.

See Also

IPFX Phone Control Toolbar

Directory

Queues

Dial

Call Control

Send a message

Record

Work Time

Config

Reports

CTI Options

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

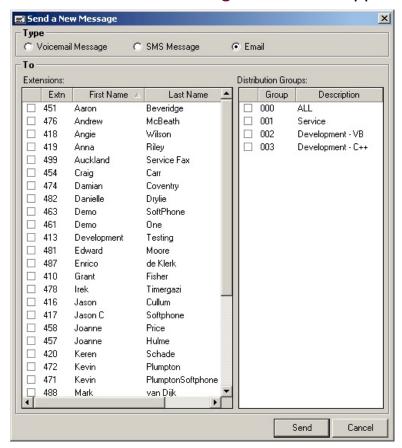
Sending a Message

Sending a Message

To send a message

1. Click on the M₅Send button on the toolbar.

The **Send a New Message** screen will appear:



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

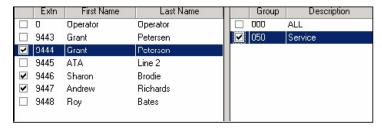
To send a Voicemail message

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.



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.



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.



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

Recording a Conversation

Stop Recording a Conversation

See Also

IPFX Phone Control

Toolbar

Directory

Queues

Dial

Call Control

Forward to Voicemail

Send a message

Work Time

Config

Reports

CTI Options

What is Record?

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

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

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

See Also

Record

Recording Criteria

Recording a Conversation

Stop Recording a Conversation

Recording Criteria

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

See Also

Record

What is Record?

Recording a Conversation

Stop Recording a Conversation

Recording a Conversation

To record a conversation

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



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



See Also

Record

What is Record?

Recording Criteria

Stop Recording a Conversation

Stop Recording a Conversation

To stop recording a conversation

1. Click the **Recording** icon.

& Record

The application will stop recording and the icon will change back to the **Record** icon.

2. The recording will be delivered to your voicemail box, as a message, for you to playback.

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

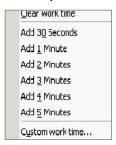
Adding Work Time

To Add Work Time

Click the Work Time icon on the toolbar.



A drop-down box will appear.



2. Click the Work Time required.

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



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

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

Work time until 11:36 am Today

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

See Also

Work Time

What is Work Time?

Custom Work Time

Clear Work Time

Setting default Work Time

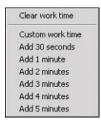
Custom Work Time

To set Custom Work Time

Click the Work Time icon on the toolbar.

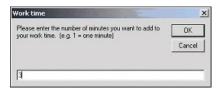


A drop-down box will appear:



2. Click Custom work time.

The Custom Work time dialog will appear:



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

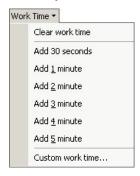
Clear Work Time

To Clear your Work Time

1. Click the Work Time icon on the toolbar.



A drop-down box will appear.



2. Click Clear work time.

Your Location will change back to your previous setting.

See Also

Work Time

What is Work Time?

Adding Work Time

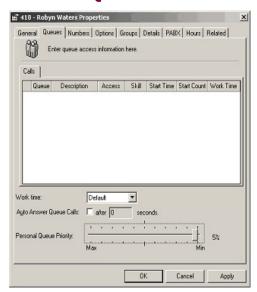
Custom Work Time

Setting default Work Time

Setting default Work Time

To set default Work Time

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



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

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

See Also

Work Time

What is Work Time?

Adding Work Time

Custom Work Time

Clear Work Time

Config

Allows you to create contacts to provide onscreen caller identification, quick key calling and general information.

Note: This feature only available if an IPFX Administrator license is purchased

See Also

IPFX Phone Control Toolbar

Directory

Queues

Dial

Call Control

Forward to Voicemail

Send a message

Record

Work Time

Reports

CTI Options

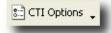
Reports

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).

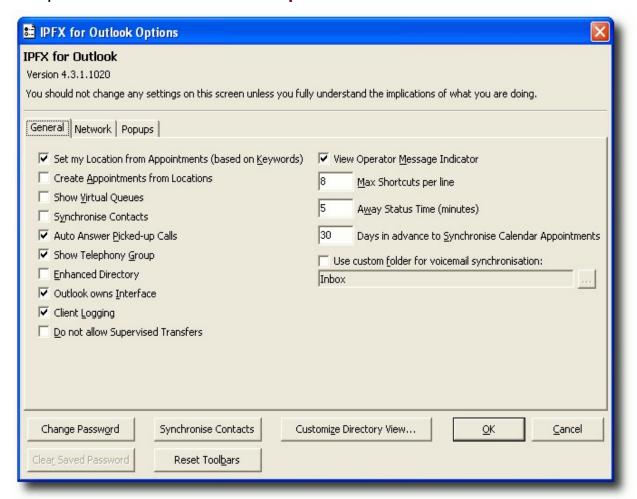
Note This feature only available if an IPFX Administrator or IPFX Supervisor Agent license is purchased

CTI Options

Click on this icon on your IPFX Phone Control Toolbar:



To open the IPFX for Outlook Options screen:



Note By default, the screen opens on the General tab.

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



Allows you to change your password. When you select this option, a Set Password box

appears:



Change Password

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

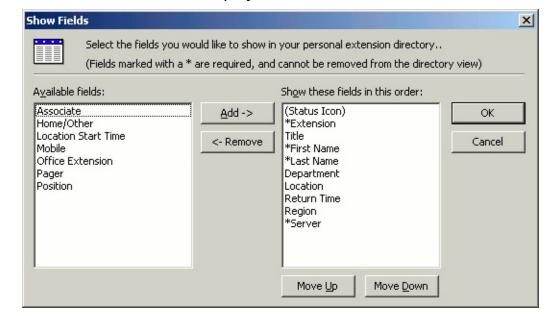
Enables you to synchronise your Contacts between the IPFX Client and your email client manually [this feature only available in IPFX for Outlook and IPFX for Lotus Notes].

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



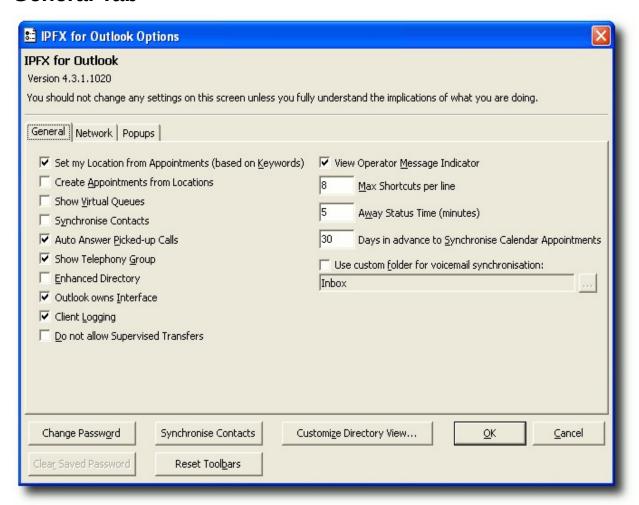
Customize Directory View...

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

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

See Also IPFX Phone Control Toolbar Directory Queues In This Section Dial General Tab Call Control Network Tab Forward to Voicemail Popups Tab Send a message Record **Work Time Config** Reports

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 <u>Calendar Functionality</u>.

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:

Additional Contacts or changes within your email

Synchronise contacts

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.

Shows the Directory and Queue view in your email client's main window. Tick the checkbox to turn this feature on, or remove the tick from the checkbox to force the view to load in a seperate window.

Enhanced directory

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. **\overline{\pi}*\overlin

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 synchronisation

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.

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

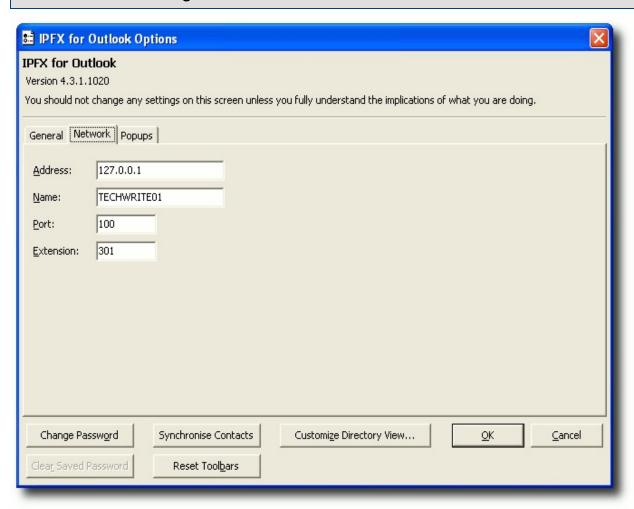
CTI Options

Network Tab

Popups Tab

Network Tab

Note: This tab may not be visible if your Administrator has turned off the "Edit Network Configuration" feature.



This Feature Does This 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. This is the port number of the CTServer. This should be the same extension as your phone. TIP To check if this Extension number is correct, if you have a digital phone pick up the receiver and the extension number will show on the screen or dial another extension that has a digital phone to see what your

extension number is when it comes up on their screen.

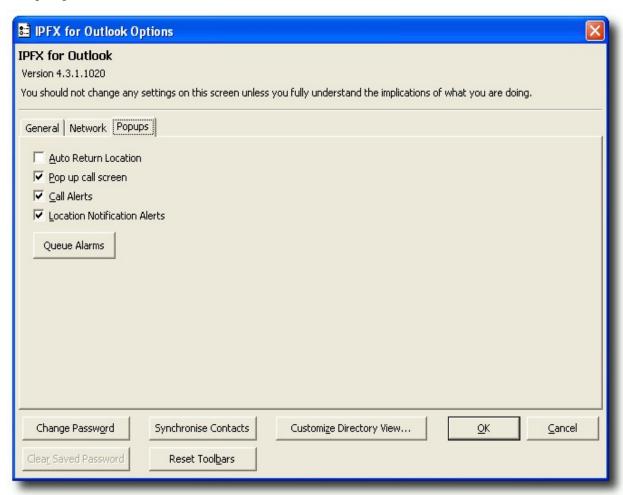
See Also

CTI Options

General Tab

Popups Tab

Popups Tab

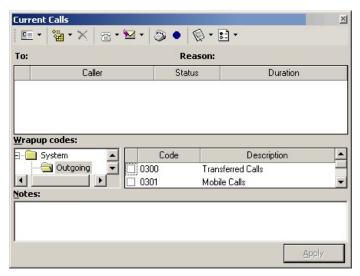


This Feature

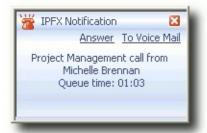
Does This

Auto Return Location

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 you are not back in the office when expected, your 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 codes* and enter notes if you have enabled these options). If you want this as your default popup screen and **Call Alerts** (below) make sure you clear the **Call Alerts** checkbox. For further information on this feature, refer to *Alerts*.



Call Alerts

This is the second of two Popup Screen options. **Call Alerts** make you aware of an incoming call in the form of a simple Popup Screen on the bottom right side of your PC screen. From this screen, you can click **Answer** to speak to the caller or send the call directly **To Voicemail**. Tick the checkbox to turn this feature on (it will also tick the **Popup call screen** box but will not be overridden by it). For further information on this feature, refer to *Alerts*.

Location Notification Alerts



This feature uses a similar Popup Screen to **Call Alerts** (above) and notifies you that your Location has changed or expired. From this screen, you can click **Change** to amend your Location setting. Tick the checkbox to turn this feature on. For further information on this feature, refer to *Alerts*.

If you wish to receive notification of Alerts or Warnings Alarms from the IPFX Contact Centre, you can select what Queues you wish to receive these from.

Note This feature only available if an IPFX Contact Centre module is purchased.

Queue Alarms

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

General Tab

Network Tab

IPFX Extensions Shortcut Toolbar



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.

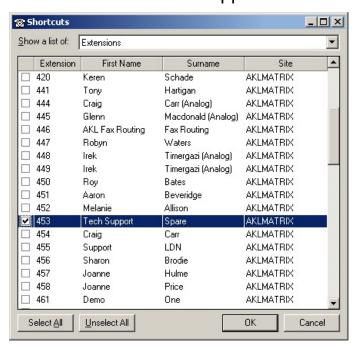
Adding Extensions or Queues to your Extension Shortcut Toolbar

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:



- 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

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

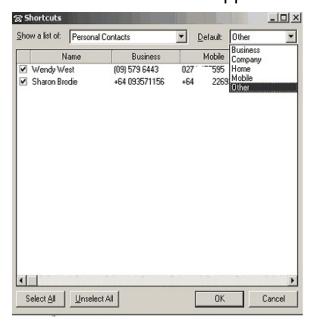
Adding Personal Contacts to your Extension Shortcut Toolbar

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:



- 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

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

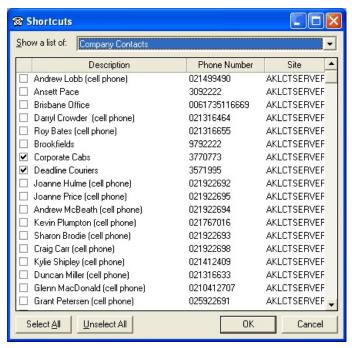
Adding Company Contacts to your Shortcut Bar

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:



- 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

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

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

To change the number of shortcuts that can be displayed on a single toolbar, refer the Max Shortcuts per line setting.

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

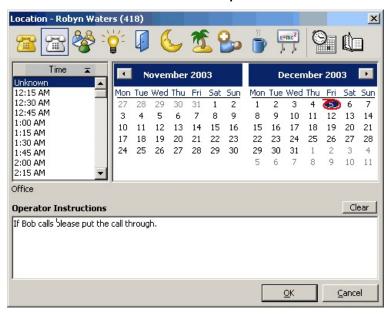
Dialling from your Extension Shortcut Bar

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.



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 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

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

IPFX Telephony Group Shortcuts

If you have ticked the **Show Telephony Group** checkbox in the IPFX Phone Control Toolbar's **CTI Options\General** tab, the IPFX Directory and Queue icons will be added to your email client's shortcuts window:



Voicemail Messages

In This Section

What is Voicemail?

<u>Listening to New Messages</u>

Remote Voicemail Access

What is Voicemail?

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

See Also

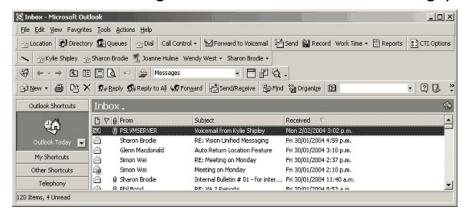
<u>Voicemail Messages</u>

<u>Listening to New Messages</u>

Remote Voicemail Access

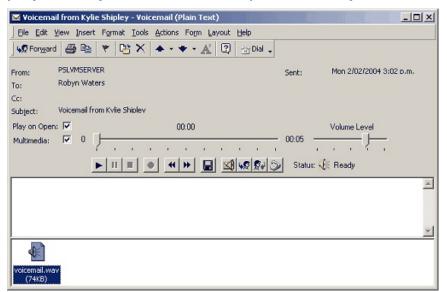
Listening to New Messages

Your Voicemail messages will be delivered to your Outlook Inbox (only if notification settings are set under Location Settings).



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.



Note If you set a rule within Outlook to move your voicemail messages to a folder from the client side, your voicemail messages will move to the folder directed and the actual voicemail will delete from your phone voicemail inbox. If your rule is set to move voicemail messages to a folder from the server side, then IPFX will not see your voicemail and will leave the voicemail message on your phone voicemail until you either delete it from the phone, or open the voicemail message within Outlook

and use the delete button from the custom form.

Microsoft Outlook Controls

Forward This allows you to forward the Voicemail message to another integrated user (Note They must also have voicemail for it to work). This allows you to Print the information currently displayed on your print the information currently displa	rnal
This allows you to Print the information currently displayed on yo	
Print Print Screen in an e-mail format.	ır
Copy You can copy the form and paste it into another document.	
Flag Will allow you to set a follow up (ie. Reminder) for this message.	
Move to Folder Move the message to another folder as done with emails.	
This will Delete the message you have open on your screen.	
Previous This will allow you to go back to the previous message/e-mail.	
Next This will allow you to go forward to the next message/e-mail.	
Help Double click on this icon to display the Microsoft Help Screen.	

See Also

Voicemail Messages

What is Voicemail?

Remote Voicemail Access

Remote Voicemail Access

In This Section

Clearing Voicemail
Messages when you are
Offsite

See Also

Voicemail Messages
What is Voicemail?
Listening to New
Messages

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.



<u>numbers</u>

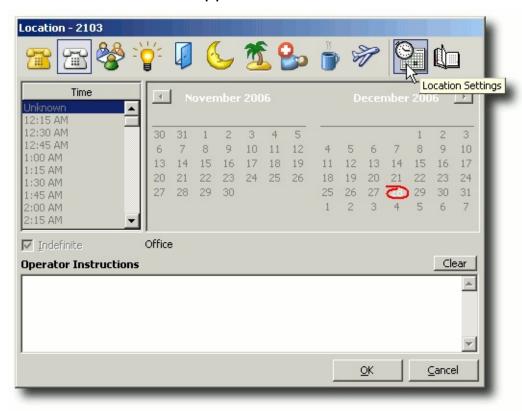
Saving money by specifying Remote Access numbers

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.

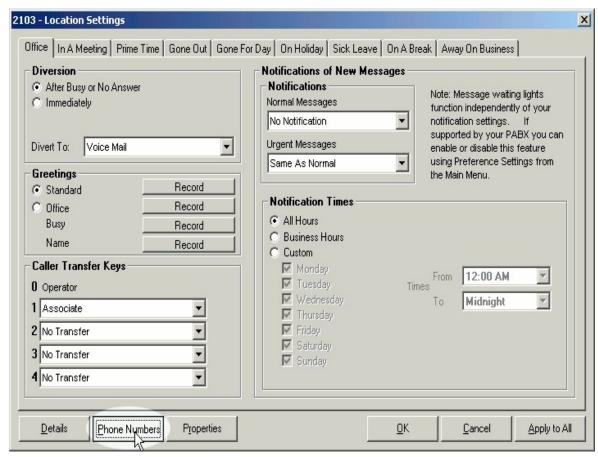
To set up Remote Access numbers

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



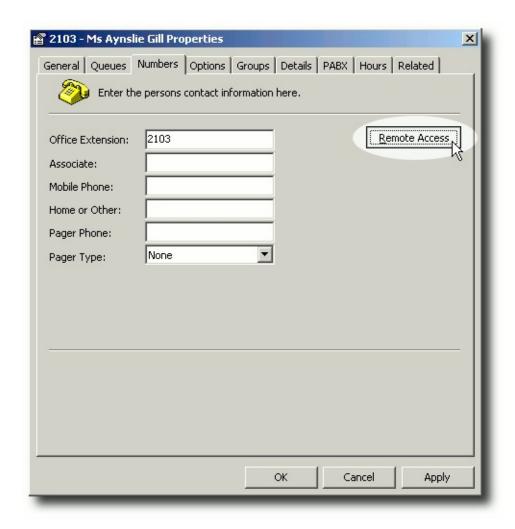
Click the Location Settings button.

3. The Location Settings window appears:



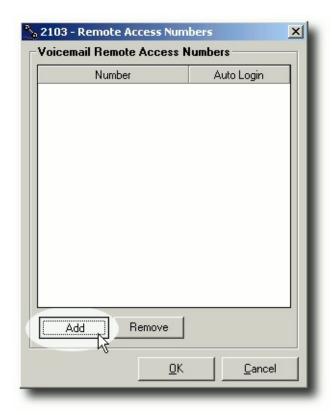
Click the **Phone Numbers** button.

4. The Phone Numbers window appears:



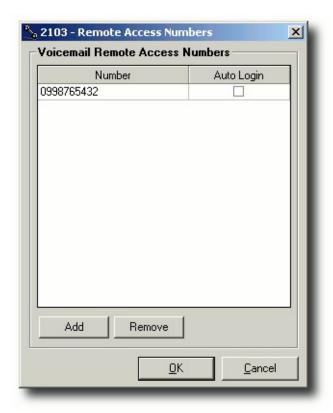
Click the Remote Access button.

5. The Remote Access window appears:



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):



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

Clearing Voicemail Messages when you are Offsite

System Tray

The System Tray (lower-left hand corner of your screen) automatically displays your Location icon when you launch your email client and log into IPFX for Outlook.

You can double-click on the Location icon to open the Current Calls screen or right-click the icon to view Location and Call Control options.

The System Tray is also where the popup screens are launched from. This section explains the popup screens in more detail.

Alerts

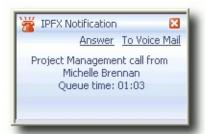
In This Section

Call alerts

Location Notification alerts

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.



Call Alerts and CRM Integration

If your organisation has purchased IPFX CRM integration, a CRM link may appear in the Call Alert popup window.

Clicking on the CRM link will open the CRM Contact form associated with the incoming CLID.

How does CRM integration associate a CRM contact with the CLID?

Only CRM Account and Contact types are searched for matching CLIDs. All phone number fields in each Account or Contact entry are tested against the incoming CLID and the first matching entry is presented in the popup's CRM link.

By default, Account entries are searched first, followed by Contact entries. This order can be changed by your Administrator.

See Also

Call alerts

Location Notification alerts

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



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

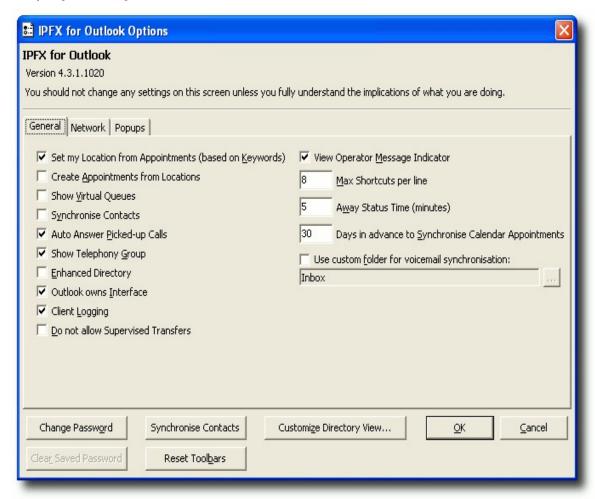
See Also
Alerts
Call alerts

Call Screen

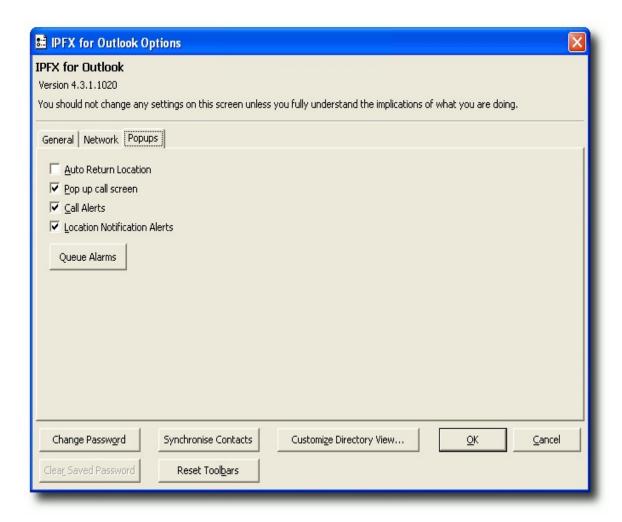
Activating the Call Screen instead of Call Alerts allows users to see more detailed Caller information and use the Wrapup feature.

To activate the Popup Call Screen

1. Click the crioptons button on the IPFX IPFX for Outlook top toolbar to display the **Options** screen:



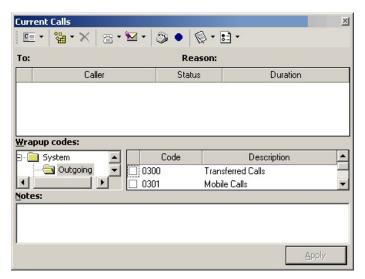
2. Click on the **Popups** Tab to view the following screen:



- 3. If both **Pop up call screen** and **Call Alerts** are checked, then **Call Alerts** will be the default popup screen. To make the **Call Screen** display instead, uncheck **Call Alerts**.
- 4. 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.

Whenever you receive a call, the **Call Screen** will popup as follows:



The sample screen shown above is displayed with the Wrapup Codes enabled.

When a call presents itself to your extension, the Popup screen will appear.

The call displays as a ringing phone (ie. Red Phone) and when answered, the icon will turn yellow (or white depending on location set) and show 'off hook'.

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

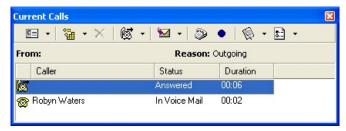
Note Caller ID is only shown if enabled on your system. If not, 'Unknown Caller' will be displayed. A name will be displayed if the Caller ID matches an entry that is in your Personal/Company Contacts or is an internal caller.

In This Section

Callers in Voicemail

Callers in Voicemail

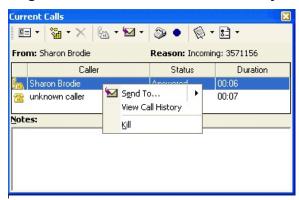
If you are already on a call and a second call appears, you are able to see the Caller ID information (Name/Description will appear if they are in your Contacts).



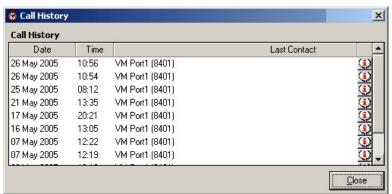
The status of the call will also be shown (i.e. In Voicemail).

To View the Call History of your Caller

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

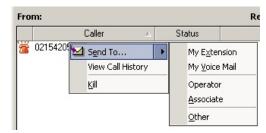


2. Click View Call History to see the Caller History.



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

Call 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.

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

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.

Contact

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.

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

View

This deletes any calls in your View folder.

Click on the down arrow at the right of the Dial button to display this dropdown menu.

Dial

This is the same menu as shown on the top tool bar.

You can carry out any of the functions listed from this menu.

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.

My Voicemail

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.

This feature allows you to record your current telephone conversation directly into your voicemail box where it can be replayed. The Record Icon will be Blue when not recording 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.
	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.

Options

Show Queue Shows the length of time that the call has spent in the queue.

Ensures Pop Screen always displays on top of any other

open screens.

Always on Top

Show button Displays captions under the buttons on the Pop Screen Captions Menu Bar.

Large Icons Resizes the icons on the toolbar.

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.

How to resize your Popup Screen

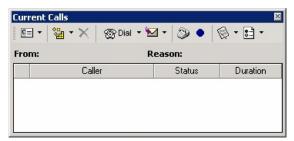
If you wish to change the size of your Popup Screen:

- 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.

Wrapup Codes

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

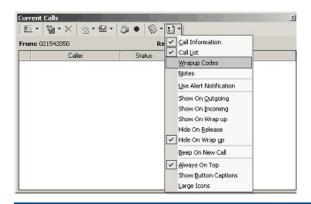
Wrapup codes can be applied to incoming calls, outgoing calls, queue calls, callback, queue emails and queue faxes.

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

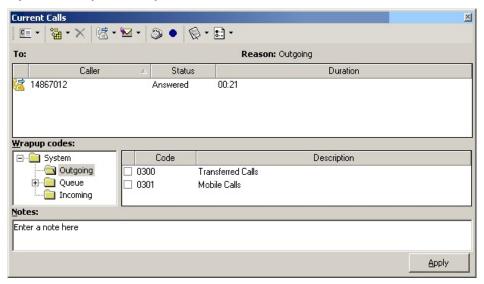
How to use Wrapup Codes

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.



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.

See Also

Wrapup Codes

How to View Wrapup Codes

Wrapup Folders

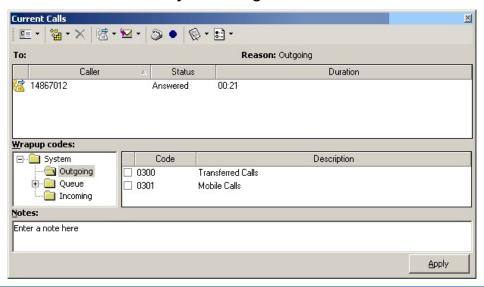
How to Use Notes

Wrapup Folders

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



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



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

See Also

Wrapup Codes

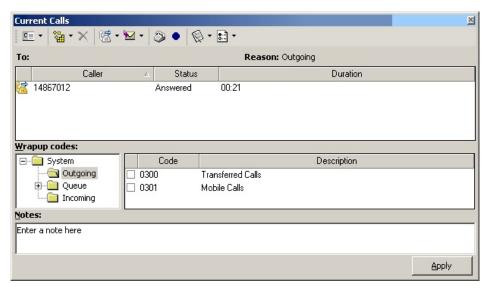
How to View Wrapup Codes

How to use Wrapup Codes

How 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.



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

Dialling from a CRM form

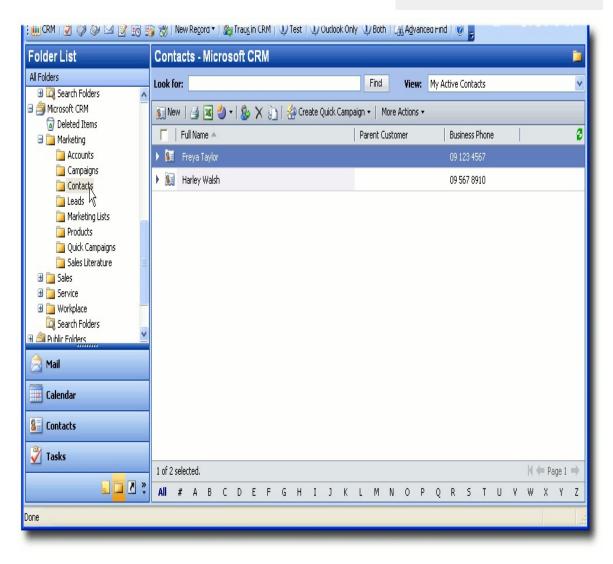
Note: This function requires that your organisation uses a Microsoft CRM server and has purchased IPFX CRM integration.

IPFX CRM integration enables you to dial directly from a CRM contact form.

To dial from a CRM contact form

1. Open your CRM **Accounts** or **Contacts** folder from your organisation's CRM web client, or from your Outlook client:

CRM Integration and Cisco 7905/7912 phones 7905 and 7912 phones will not immediately dial out on you clicking the CRM Dial button. Instead, your own handset will ring. You must pick up the handset before your phone will dial out.



2. Double-click on a contact's name to open that contact's CRM form:



3. Click the **Dial...** button in the toolbar. Your phone will dial the contact's Business Phone number.

Suppressing Voice Capture



PBX Dependent Feature!

Note: Voice capture suppression is only available if specifically enabled by your organisation. Check with your Administrator whether you can use voice capture suppression.

About voice capture

At any time, your calls may be recorded by the IPFX system: either continuously as part of your organisation's standard policy, or on ad hoc basis by a supervisor.

However, under certain circumstances for example, for legal reasons you may wish to prevent a call from being recorded. IPFX calls this ability *voice capture suppression*.

To prevent a call from being recorded

- 1. Contact your organisation's IPFX Administrator to obtain the voice capture suppression code.
- 2. During the call, enter the voice capture suppression code using the keypad on your phone. Don't spend too long entering the code: you only have limited amount time to complete the sequence after pressing the first key (usually 2 seconds, but check with your Administrator).

Notes:

- Voice Capture suppression may be initiated by either party in a call.
- Voice Capture Suppression can only prevent calls from being recorded by the IPFX System. It cannot prevent calls from being recorded by external parties to a phone call.
- On a call where an internal extension has dialled your direct dial number (as opposed to your extension number), Voice Capture suppression will only prevent the call from being recorded on your own extension. Both sides of the conversation may still be recorded from the other extension.

Notes

				
-	·	·	·	

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 used)

Wrapup Codes (if used)

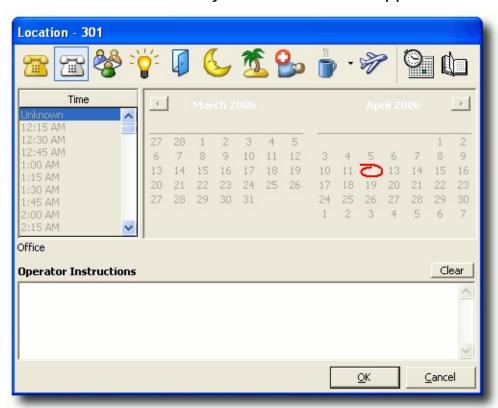
Queue Number	Queue Name		
-			
_			

See Also

Queue Notes

Queues in which I am an agent

1. The Location screen for your extension will appear:



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

See Also

Setting your location in IPFX for Outlook