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

- About This Guide
- What this guide covers
- Phone limitations
- Typographical Conventions
- Getting Help
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.

See Also

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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).

See Also

About This Guide
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Getting Help
Typographical Conventions

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

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

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

See Also

- About This Guide
- Who This Guide Is For
- What this guide covers
- Phone limitations
- Getting Help
Getting Help

Press **F1** within any IPFX screen for online product help.
Log a call with our Helpdesk if you have questions or problems using an IPFX product.

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### See Also
- [About This Guide](#)
- [Who This Guide Is For](#)
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- [Phone limitations](#)
- [Typographical Conventions](#)
Before You Begin

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

1. Dial your voicemail mailbox number (check with your Network Administrator if you do not know the number)
2. Enter a new Password (PIN number) followed by the # key.
   Passwords should:
   - be 4-15 digits in length
   - not start with 0
   - be a number you will easily remember
   - be a number that only you know
3. Press # again to confirm your Password or re-enter a new one
4. Record your full name after the tone. At the end of your recording press #
   Example: John Smith #
   Note: Your name may have already been recorded for you. If so, skip to step 7
5. Press 1 to Listen to your name; or
   Press 2 to Re-record
6. Press # to Continue (when satisfied with the name recording)
7. Record your standard greeting (after the tone)
   Example: “Hi, this is John, sorry I'm currently unavailable. Please leave me a message and I will return your call as soon as I can. Or press 0 to transfer back to the operator”
8. At the end of your recording, press #
9. Press 1 to Listen to your greeting; or
   Press 2 to Re-record
10. Press # to Finish and Hang Up (when satisfied with your greeting)
    For information about using voicemail via the phone itself, refer to the separate IPFX Voicemail (Phone only) User Guide.

Phone Forwarding (NEC Only)

Please do the following action to activate Phone Forwarding:

1. Lift Handset
2. ( 
3. Replace Handset
Starting IPFX 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:

![Security Alert Screen]

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 previously set 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
Using locations

In This Section

What are locations?
Locations and default return times
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Returning from a location
Setting another extension's location
Operator Instructions
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Changing your extension's properties
Call Profiles
IPFX MS Exchange Out of Office Assistant Integration
Calendar Functionality
What are locations?

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

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

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

See Also

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### Locations and default return times

<table>
<thead>
<tr>
<th>Location</th>
<th>Default return time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Queue (Yellow phone)</td>
<td>N/A. You will generally remain logged into your queue until you manually set yourself to a different location.</td>
</tr>
<tr>
<td>Office (White phone)</td>
<td>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.</td>
</tr>
<tr>
<td>In A Meeting</td>
<td>1 hour</td>
</tr>
<tr>
<td>Do Not Disturb or Prime Time</td>
<td>1 hour</td>
</tr>
<tr>
<td>Gone Out</td>
<td>1 hour</td>
</tr>
<tr>
<td>Gone For Day</td>
<td>Beginning of business, the next day.</td>
</tr>
<tr>
<td>On Leave</td>
<td>Beginning of business, the next day.</td>
</tr>
<tr>
<td>Sick Leave</td>
<td>Beginning of business, the next day.</td>
</tr>
<tr>
<td>On A Break</td>
<td>15 minutes.</td>
</tr>
<tr>
<td>Away On Business</td>
<td>Beginning of business, the next day.</td>
</tr>
</tbody>
</table>

### 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:

See Also

- Using locations
- What are locations?
- Locations and default return times
- 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
- 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:

  ![Location Expired Window](image)

  Your location has expired.
  Would you like to set a new location now?
  - Office
  - Queue
  - Other

  Click Later to be reminded again: 5 minutes

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

  - Click the **Office** or **Queue** buttons to set your location to Office or Queue respectively.
  - Click the **Other** button to set yourself to any other location.
  - Select a number of minutes from the drop-down menu and click **Later** to postpone your return for the allotted time.

- **Automatic return**. Alternatively, your IPFX client can automatically set your location to Office when a location expires. To turn on Automatic Return, open the CTI Options screen and check the **Auto Return Location** checkbox in the **Popups** tab.

  See Also

  Using locations
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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.

See Also

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

If you have added a colleague's extension to your Extension Shortcut Toolbar, 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:

![Location screen]

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

- Setting another extension's location
- 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.
| 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**.

See Also
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<th><strong>Operator Instructions</strong></th>
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</thead>
<tbody>
<tr>
<td><strong>Viewing Operator Instructions</strong></td>
</tr>
</tbody>
</table>
Viewing Operator Instructions

Operator Instructions for any extension can be read from that extension's Location screen.

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: 🕒.

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 you 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:

<table>
<thead>
<tr>
<th>Time Period</th>
<th>Specifies</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Hours</td>
<td>(24 hours a day, 7 days a week)</td>
</tr>
<tr>
<td>Business Hours</td>
<td>8.00am to 5.30pm Monday to Friday</td>
</tr>
<tr>
<td>Custom Hours</td>
<td>Actual days/times you want to be notified.</td>
</tr>
<tr>
<td>Server Times</td>
<td>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.</td>
</tr>
</tbody>
</table>

**See Also**

- Using locations
- What are locations?
- Locations and default return times
- Setting your location in IPFX for Outlook

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- Returning from a location
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<td>Calendar Functionality</td>
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</tbody>
</table>
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 XXXXX 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.

![418 - Location Settings](image)

**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.

<table>
<thead>
<tr>
<th>See Also</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="#">Changing your extension's properties</a></td>
</tr>
<tr>
<td><a href="#">Setting up your mailbox phone numbers</a></td>
</tr>
<tr>
<td><a href="#">Viewing Queue Properties</a></td>
</tr>
<tr>
<td><a href="#">Properties</a></td>
</tr>
<tr>
<td><a href="#">Groups Tab</a></td>
</tr>
<tr>
<td><a href="#">Viewing Site Specific Details</a></td>
</tr>
<tr>
<td><a href="#">PABX Tab</a></td>
</tr>
<tr>
<td><a href="#">Hours</a></td>
</tr>
<tr>
<td><a href="#">Related</a></td>
</tr>
</tbody>
</table>
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

See Also
- Changing your extension's properties
- Details Button
- Setting up your mailbox phone numbers
- Properties
- Groups Tab
Viewing Site Specific Details
PABX Tab
Hours
Related
Changing Work Time

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

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
<table>
<thead>
<tr>
<th>Auto Answer Queue Calls</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Queue Priority</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>See Also</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Viewing Queue Properties</strong></td>
</tr>
<tr>
<td><strong>Changing Work Time</strong></td>
</tr>
<tr>
<td><strong>Auto Answer Queue Calls</strong></td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>This Feature</th>
<th>Does This</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Allows users to listen to their new messages immediately after they have</td>
</tr>
<tr>
<td></td>
<td>entered their password instead of having to listen to the Main Menu</td>
</tr>
</tbody>
</table>
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.

If you do not want to hear the message options after each message is played, click on the checkbox to enable Continuous Message Playback. This will allow messages to be played back to back.

Continuous Message Playback*

You can still use the message options for each message to save, delete etc but they won't be announced until all messages have been played. You will be able to save/delete all remaining messages.

The default setting for this is OFF.

Message Light Tone

When a Voicemail message is left by a caller, the message light will show on your phone. The default setting for this is ON.

Auto Logon

When this checkbox is selected, you will be able to push x1 (your code for voicemail i.e. 51 or 61) on your phone and instead of entering your password, you will be automatically logged on to voicemail.

Auto Answer Port Calls

When you want to record a Message Box, a Voicemail Message, etc, your phone rings and auto answers by default. this option allows your phone to ring and the user to pick up the phone, instead of it auto answering before timing out.

Caller Voicemail Settings

<table>
<thead>
<tr>
<th>This Feature</th>
<th>Does This</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smart Greetings*</td>
<td>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). The default setting for this is ON.</td>
</tr>
<tr>
<td>Transfer Message</td>
<td>This notifies the caller that they are being transferred. I.e. “Please hold while I transfer you now”. 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).</td>
</tr>
<tr>
<td>Record Instructions</td>
<td>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. 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.</td>
</tr>
<tr>
<td>Inform Caller of Busy/No Answer</td>
<td>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.</td>
</tr>
</tbody>
</table>
Personal Queueing

The default setting for this is OFF.

Click the 'busy' icon to record an announcement to be played to the caller on reaching your voicemail, if you are on the phone.

Click the 'Repeat' button to record an announcement to be played to a caller who is queuing.

By setting Allow Callback to ON, the caller will be prompted for his phone number and the message. The number will be played to you when your current call is completed.

You must have Caller on Hold / Retry on Busy setting to ON.

The default setting for this is OFF.

Allow Callback

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

![Security dialog box]

If you do have permission, the following screen displays:

![Show Fields dialog box]

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

**Record Calls**

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

**See Also**

*Changing your extension's*
properties
Details Button
Setting up your mailbox phone numbers
Viewing Queue Properties
Groups Tab
Viewing Site Specific Details
PABX Tab
Hours
Related
Groups Tab

See Also

- Changing your extension's properties
- Details Button
- Setting up your mailbox phone numbers
- Viewing Queue Properties
- Viewing Site Specific Details
- PABX Tab
- Hours
- 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.

![Contact Group Properties](image)

**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 resizeable 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
Viewing Queue Properties
Properties
Groups Tab
PABX Tab
Hours
Related
**PABX Tab**

**PBX Dependent Feature!**

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

<table>
<thead>
<tr>
<th>This Feature</th>
<th>Does This</th>
</tr>
</thead>
<tbody>
<tr>
<td>DDI/DID</td>
<td>Shows the DDI/DID connected to this extension number (greyed out for users)</td>
</tr>
<tr>
<td></td>
<td>Displays the type of Outbound DDI Type. Select from the drop-down Menu.</td>
</tr>
<tr>
<td></td>
<td>Available options are:</td>
</tr>
<tr>
<td></td>
<td>None: The PBX pilot number will be used for CLID presentation</td>
</tr>
<tr>
<td></td>
<td>DDI: The extension's DDI will be used for CLID if any. If not then defaults to &quot;none&quot;.</td>
</tr>
<tr>
<td></td>
<td>Other: The value of Outbound CLID field will be taken as CLID, If left empty reverts to &quot;None&quot;.</td>
</tr>
<tr>
<td></td>
<td>Restrict: CLID is withheld, i.e. called party will see no CLID.</td>
</tr>
<tr>
<td>Outbound CLID Type</td>
<td>This displays the CLID that the company is displaying when you make an outbound call.</td>
</tr>
<tr>
<td>Forward All</td>
<td>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.</td>
</tr>
<tr>
<td>Forward Busy</td>
<td>The 'forward busy' selection is always set to divert to the Voicemail Port.</td>
</tr>
<tr>
<td>Forward No Answer</td>
<td>The 'forward no answer' selection is always set to divert to the Voicemail Port.</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Forward Timeout</td>
<td>The ‘forward timeout’ selection is for adjusting how long the user's extension rings before diverting to voicemail.</td>
</tr>
<tr>
<td>Forward NU</td>
<td>Destination is unobtainable. When a caller phones your extension, if your phone is unobtainable this setting advises where your callers go.</td>
</tr>
<tr>
<td>Reboot Extn</td>
<td>This button is not visible to users. This feature causes a full reload and will drop any calls that are in progress.</td>
</tr>
<tr>
<td>Reset Extn</td>
<td>This button is not visible to users. This feature is used to update the phone.</td>
</tr>
<tr>
<td>Route Level</td>
<td>Select the Route Level from the drop-down Menu. (greyed out for Users)</td>
</tr>
</tbody>
</table>

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

**See Also**
- Changing your extension's properties
- Details Button
- 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.

![Hours Tab](image)

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.

![Select Contacts screen](image)

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

1. 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 **add or edit a Personal Contact Group**.

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

### See Also

- **Call Profiles**
- **Add the Settings/Properties to your Call Profile**
Add the Settings/Properties to your Call Profile

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

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

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

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

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

(You must record an individual profile greeting).

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

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

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

**Caller Transfer Keys**

<table>
<thead>
<tr>
<th>Caller Transfer Keys</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key 0 Operator</td>
</tr>
<tr>
<td>Key 1 No Transfer</td>
</tr>
<tr>
<td>Key 2 No Transfer</td>
</tr>
<tr>
<td>Key 3 No Transfer</td>
</tr>
<tr>
<td>Key 4 No Transfer</td>
</tr>
<tr>
<td>Default Voicemail</td>
</tr>
</tbody>
</table>

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

In This Section

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

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
Calendar Functionality
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:

<table>
<thead>
<tr>
<th>Location</th>
<th>Out-of-Office Assistant Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office, Queue</td>
<td>Off (in the office).</td>
</tr>
<tr>
<td>Any other Location</td>
<td>On (&quot;I am currently out of the office&quot;).</td>
</tr>
</tbody>
</table>

Example Settings:

1. "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 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**:

<table>
<thead>
<tr>
<th>Toolbar button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="location.png" alt="Location" /></td>
<td>Lets you change your <strong>location</strong>. Your location determines how the phone system handles incoming calls, and informs callers and staff of your whereabouts and expected return time. More...</td>
</tr>
<tr>
<td><img src="directory.png" alt="Directory" /></td>
<td>Opens the <strong>directory</strong>. Through the directory you can view a list of internal extensions, external company-wide contact numbers, and queues. Information in the directory is updated dynamically in real time - if you want to see if your colleague is on a call, in a meeting, or out to lunch, check the directory! More...</td>
</tr>
<tr>
<td><img src="queues.png" alt="Queues" /></td>
<td>Opens the directory in 'queue view' mode. This view mode allows you to see information associated with your queues: Grade of Service, number of calls, number of agents available, and other details. More...</td>
</tr>
<tr>
<td><img src="dial.png" alt="Dial" /></td>
<td>Allows you to dial a number from your PC (instead of using the phone's keypad). For headset users, this is a convenient way of handling your phone calls without taking your eyes off the screen. This button is a shortcut to one of the Call Control options (see below). More...</td>
</tr>
<tr>
<td><img src="call_control.png" alt="Call Control" /></td>
<td>The Call Control button allows you to control your telephone from your PC. You can dial a number, answer a call, hang up, place a caller on hold, perform transfers and more, all using your mouse and keyboard. More...</td>
</tr>
<tr>
<td><img src="forward_to_voicemail.png" alt="Forward to Voicemail" /></td>
<td>Sends an ringing or answered call immediately to your voicemail system. More...</td>
</tr>
<tr>
<td><img src="send.png" alt="Send" /></td>
<td>Lets you create and send a message to one or more of your colleagues. This button allows you to send e-mail messages, voicemail messages, or SMS messages (i.e. 'text messages' for mobile phones). More...</td>
</tr>
<tr>
<td><img src="record.png" alt="Record" /></td>
<td>Allows you to record your telephone conversation for future reference or use. Only 5 minutes of conversation can be recorded at time. More...</td>
</tr>
<tr>
<td><img src="work_time.png" alt="Work Time" /></td>
<td>Used by Contact Centre agents, the Work Time button allows an agent to temporarily prevent queue calls from being delivered to their extension. Work Time enables the agent to document or otherwise finish tasks related to a completed call before receiving more calls from the queue. More...</td>
</tr>
</tbody>
</table>

**Administrator-only function.** The **Config** button allows an Administrator to make changes to the IPFX system. For example, an Administrator would use this button to add and remove extensions. More...
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.

A short cut menu will appear:

![Shortcut Menu]

**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
- Chat
- Setting a Callback
- Send an Email message from the Directory
- SMS
- View Extension Images
- Customized Printout
- Print Preview
- Extension Properties
<table>
<thead>
<tr>
<th>Filtering the Directory</th>
</tr>
</thead>
<tbody>
<tr>
<td>Directory Integration</td>
</tr>
</tbody>
</table>
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
SMS
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.

![Insight: Extension 412](image)

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

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

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

**Functionality from the top toolbar**

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

Functionality within the Main Tab:

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

<table>
<thead>
<tr>
<th>This Feature</th>
<th>Does This</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>Name of the User who has forwarded the calls.</td>
</tr>
<tr>
<td>From</td>
<td>CLI of the Caller.</td>
</tr>
<tr>
<td>Status</td>
<td>What Location the user is in.</td>
</tr>
<tr>
<td>Reason</td>
<td>Reason for the Call.</td>
</tr>
<tr>
<td>Greeting</td>
<td>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.</td>
</tr>
<tr>
<td>LCD</td>
<td>Send an LCD Display message to a user's phone. This is an IPFX for NEC feature only.</td>
</tr>
<tr>
<td>Chat</td>
<td>Enables you to chat with the extension. This is an IPFX for NEC feature only.</td>
</tr>
<tr>
<td>Clear</td>
<td>Clears all LCD Message sent. This is an IPFX for NEC feature only.</td>
</tr>
<tr>
<td>Operator Instructions</td>
<td>This displays any operator instructions the user has left for you.</td>
</tr>
<tr>
<td></td>
<td>This displays the history of the caller (both internal and external), eg: Customer A has called in three times over the last week.</td>
</tr>
</tbody>
</table>
This feature will also display any Call flow and/or notes from extensions within the company for each call if you place your cursor over the 📞. This will display the details screen as shown below.

![Call Details Screen](image)

This is only visible when on a live call.

### See Also

- **Insight - Viewing Extension Details and Appointments**
- **Viewing User Tab of Insight**
- **Viewing Related Tab of Insight**
- **Viewing Schedule Tab of Insight**
### Viewing User Tab of Insight

#### Functionality within the User Tab

<table>
<thead>
<tr>
<th>This Feature</th>
<th>Does This</th>
</tr>
</thead>
<tbody>
<tr>
<td>Miscellaneous Information</td>
<td>Shows miscellaneous information from the Details tab of the user's Properties screen.</td>
</tr>
<tr>
<td>Notes</td>
<td>Shows information from the Notes field of the Details tab of the user's Properties screen.</td>
</tr>
<tr>
<td>Position</td>
<td>User's Position.</td>
</tr>
<tr>
<td>Department</td>
<td>User's Department.</td>
</tr>
<tr>
<td>Region</td>
<td>Region where the User is located.</td>
</tr>
</tbody>
</table>

---

See Also

- Insight - Viewing Extension Details and Appointments
- Viewing Main Tab of Insight
- Viewing Related Tab of Insight
- Viewing Schedule Tab of Insight
Viewing Related Tab of Insight

**Functionality within the Related Tab**

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

**To transfer a call in Insight**

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

*or*

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

<table>
<thead>
<tr>
<th><strong>This Feature</strong></th>
<th><strong>Does This</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Related Extension Name</td>
<td>Internal Extension Number and Name of the Relationship Contact.</td>
</tr>
<tr>
<td>Related Extension Relationship</td>
<td>How this person relates to the extension's position and why the Operator/Agent can contact this person in your absence.</td>
</tr>
<tr>
<td>Related Contacts</td>
<td>Contact Description of an External Contact.</td>
</tr>
<tr>
<td>Related Contact Relationship</td>
<td>How this contact relates to the extension's position and why the Operator/Agent can contact this person in the extension's absence.</td>
</tr>
<tr>
<td>See Also</td>
<td></td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Insight - Viewing Extension Details and Appointments</td>
<td></td>
</tr>
<tr>
<td>Viewing Main Tab of Insight</td>
<td></td>
</tr>
<tr>
<td>Viewing User Tab of Insight</td>
<td></td>
</tr>
<tr>
<td>Viewing Schedule Tab of Insight</td>
<td></td>
</tr>
</tbody>
</table>
Viewing Schedule Tab of Insight

Functionality within the Schedule Tab

<table>
<thead>
<tr>
<th>This Feature</th>
<th>Does This</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extension</td>
<td>Displays scheduled appointments for the selected extension</td>
</tr>
<tr>
<td>Related</td>
<td>Displays scheduled appointments for the selected extension and related extensions.</td>
</tr>
<tr>
<td>Department</td>
<td>Displays scheduled appointments for all extensions in the selected extension's department.</td>
</tr>
<tr>
<td>Team</td>
<td>Displays scheduled appointments for the selected extension's team.</td>
</tr>
<tr>
<td>Display</td>
<td>Refreshes the display view of the Appointments.</td>
</tr>
</tbody>
</table>

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
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.
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
Send an Email message from the Directory
SMS
View Extension Images
Customized Printout
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

1. 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

- Directory
- What is the Directory?
- 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.

1. 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

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What is the Directory?
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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:

![Example of SMS messaging](image)

### See Also

- [Directory](#)
- [What is the Directory?](#)
- [Dialing from your Directory Listing](#)
- [Dialling Other Available Numbers](#)
- [Insight - Viewing Extension Details and Appointments](#)
- [Conferencing](#)
- [Chat](#)
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- [Send an Email message from the Directory](#)
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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
Dialling Other Available Numbers
Insight - Viewing Extension Details and Appointments
Conferencing
Chat
Setting a Callback
Send an Email message from the Directory
SMS
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

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See Also

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What is the 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
Print Preview
Extension Properties
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.
In This Section

Icons on the Main toolbar & Print Preview

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
Send an Email message from the Directory
SMS
View Extension Images
Customized Printout
Extension Properties
Filtering the Directory
Directory Integration
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:

   ![Context Menu](image)

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 your Administrator.

**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
Send an Email message from the Directory
SMS
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.

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Directory Integration

To view the directory integration with Microsoft Outlook 2000 onwards

1. Select **File** from the Directory Menu
2. 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 within Outlook, this feature is not available as you are already within Outlook.

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
Send an Email message from the Directory
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View Extension Images
Customized Printout
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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

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

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

To view Queues

Click the Queues icon on the IPFX Toolbar.

The Queue Summary screen will appear:

![Queue Summary](image)

Across the top of the queues are the Column Headers. Select the column of your choice by clicking in the Column Header to sort ascending or descending. A description of the columns is set out below.

**Queue**

This is the queue pilot reference number allocated to the queue. This is set by the Telephony System.

**Description**

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

This description will also populate an LCD Message on a Dterm Phone (dependent on PABX), or a users screen pop to allow Call Centre Agents to differentiate which queue a customer is calling.

- Mode
- Mode indicates whether the queue is automatically or manually opened.
- Automatic will open/close and forward the queue based on the queue schedules.
- Manual indicates the auto setting has been manually overridden to forward to another Queue or Message Box.
- When in Manual mode, the specified schedule times will not be adhered to.
- Queues will stay in manual mode until reset to auto.

**Status**

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

**Calls**

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

**Longest**

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

**Agents**

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

**Answered**

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

**Abandoned**

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

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

**Other**

- A call which comes in on a queue, gets a message box as a queue announcement and then gets transferred to another destination other than the original queue from the message box.
A call which comes in on a queue and gets manually picked up by someone not logged into the queue i.e. a supervisor.

**GOS**

Current (GOS) Grade of Service Level for queue.

**Site**

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

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

**See Also**

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

You can view individual Queue Agent performances and Call Flow for each queue.
Click on the queue icon.
Double click on the queue required.

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 (e.g., 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 (i.e. Supervisor picks up directly from queue) or call transferred out of the queue. Also includes calls to queue after Queue has closed.

See Also
- Viewing Queue Agents and Call Flow
- Queue Name
- Agent Information
Agent Information

Extension
The agent's extension.

First Name
The agent's first name.

Last Name
The agent's last name.

Location
The agent's current location setting.

Return Time
The time the agent is due to return.

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

Avg Talk
The average talk time for each call.

Access
The level assigned to the agent for queuing.

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

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

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

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

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

**See Also**

- [Viewing Queue Agents and Call Flow](#)
- [Queue Name](#)
- [Queue Statistics](#)
Viewing Queue Calls

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

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

The bottom half of the screen shows all current Queue Calls.

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.

**See Also**

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

Extension
The extension of the agent who has answered the call. This will only show if the call has been answered.

Subject
The queue name that the caller came through.

Caller
If CLID (Caller Line ID) is enabled, the caller's number will show. If the caller is listed in the Company or Personal Directory, his/her name or description will show.

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

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

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

Talk Time
The length of conversation time.

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

Trunk
The trunk line the call came in on.

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

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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 on at any stage.

The correct procedure for handling callback calls is either:

- ✔ Accepting the callback,
- ☰ 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 of the queue to ensure accurate call management.

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

### See Also

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

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

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

See Also

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

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

Double click to take the call if required.

See Also

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

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

**To open a Queue**

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

   ![Queue shortcuts](image)

2. Click Queue Control. The Queue Control options will appear.

   ![Queue options](image)

**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.

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Queue Properties

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

To view a Queue's Properties

1. Right-click on the required queue.
   The shortcut menu will appear.
2. Click **Properties**...
   The Queue Properties screen will appear:

![Queue Properties Screen](image)

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

See Also

- **Queues**
- **What is a Queue?**
- **Viewing Queues**
- **Viewing Queue Agents and Call Flow**
Viewing Queue Calls
Queue Pickup
Last Agent to Log out of Queue Notification
Queue Hold
Queue Control
Dial

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.

| Set Location… |
| Open… |
| Dial… |
| Answer |
| Hang up |
| Blind Transfer… |
| Supervisor Transfer… |
| Consultative Transfer |
| Cancel Transfer |
| Hold |
| Reject |
| Queue Hold |
| Queue Resume |
| Hold for… |
| PICK UP… |
| Conference… |
| Monitor… |
| Intrude… |
| Cancel |

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

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

1. Click on the Answer button (This is the Dial button that changes based on the phone state).
2. Select Answer from the drop-down list.
   - your call will be played through your phone speaker (depending on your phone type).
   
   or

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

For headset users, this is a convenient way of handling your phone calls without taking your eyes off your screen.
Dial/Making an Outbound Call

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

See Also
Call Control
Recently Dialed Numbers
Answering a Call
Hangup/Completing a Call
Transferring a Call
Cancel Transfer

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Dialing from your Outlook
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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.

![Edit Location](image)

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 Dialed Numbers

To dial a recently dialed 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
<table>
<thead>
<tr>
<th>Hold For</th>
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<td>Monitor</td>
</tr>
<tr>
<td>Intrude</td>
</tr>
</tbody>
</table>
Answering a Call

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

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

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

See Also

Call Control
Dial/Making an Outbound Call
Recently Dialed Numbers
Hangup/Completing a Call
Transferring a Call
Cancel Transfer
Hold
Resume
Queue Hold
Queue Resume
Hold For
Pickup
Monitor
Intrude
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 Dialed Numbers
- Answering a Call
- Transferring a Call
- Cancel Transfer
- Hold
- Resume
- Queue Hold
- Queue Resume
- Hold For
- Pickup
- Monitor
- Intrude
Transferring a Call

To transfer a call

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

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

The Transfer screen will display.

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.

### In This Section
- Complete Transfer

### See Also
- Call Control
- Dial/Making an Outbound Call
- Recently Dialed Numbers
- Answering a Call
- Hangup/Completing a Call
- Cancel Transfer
- Hold
- Resume
- Queue Hold
- Queue Resume
- Hold For
- Pickup
- Monitor
- Intrude
Complete Transfer

To complete the Transfer

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

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 Dialed 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**
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 Dialed 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.

   ![Drop-down menu showing options for Queue Hold, Hold, Resume, etc.]

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
Cancel Transfer
Hold
Resume
Queue Resume
Hold For
Pickup
Monitor
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 Dialed Numbers
- Answering a Call
- Hangup/Completing a Call
- Transferring a Call
- Cancel Transfer
- Hold
- Resume
- Queue Hold
- Hold For
- Pickup
- Monitor
- Intrude
Hold For

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

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

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

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

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

**To put a caller on Hold For**

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

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
Pickup
Monitor
Intrude
Pickup

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

To pick up 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
Queue Hold
Queue Resume
Hold For
Monitor
Intrude
Monitor

To Monitor the conversation of another party

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

   ![Call Control Options]

   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.
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<td>Intrude</td>
</tr>
</tbody>
</table>
Intrude

Note This feature requires IPFX Administrator privileges.

To Intrude on a call

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

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
- Pickup
- 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 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 icon]

   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
What is Work Time?
Allows an agent in a IPFX Contact Centre to schedule some time after hanging up to complete the call's requirements or documentation, before receiving another queue call.
Work time can be set for each individual agent by default so that after a call, they always have time before the next call is sent to them.
Alternatively, each agent can set work time as and when required.

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

**See Also**
- Work Time
- Adding Work Time
- Custom Work Time
- Clear Work Time
- Setting default Work Time
Adding Work Time

To Add Work Time

1. Click the Work Time icon on the toolbar.

   ![Work Time icon]

   A drop-down box will appear.

   ![Work Time dropdown]

   2. Click the Work Time required.

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

      ![Location icon]

      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 11:30 am Today]

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

See Also

Work Time
What is Work Time?
Custom Work Time
Clear Work Time
Setting default Work Time
Custom Work Time

To set Custom Work Time

1. Click the Work Time icon on the toolbar.

   A drop-down box will appear:

   ![Work Time Icon]

2. Click Custom work time.

   The Custom Work time dialog will appear:

   ![Custom Work Time Dialog]

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

   Your location will change to show work time.

   ![Location Icon]

   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.

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.

   ![Work Time Icon](image)

   A drop-down box will appear.

   ![Work Time Dropdown](image)

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

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

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### 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:

![IPFX for Outlook Options](image)

**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:

<table>
<thead>
<tr>
<th>This Feature</th>
<th>Does This</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Allows you to change your password. When you select this option, a Set Password box</td>
</tr>
</tbody>
</table>
Change Password appears:

Enter and confirm your new password. Click OK to change.

Next time you open the application you can use your new password.

**Note** Only numeric characters 0 - 9 are allowed for your password and it must not start with a 0. It must also be between 4 and 15 digits long.

**Clear Saved Password** Enables you to reset the password prompt at the start-up screen (when the user has checked 'Save Password' at startup).

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

**Reset Toolbars** This feature enables you to reset your Toolbars to the default setup as set by the Administrator [this feature only available in IPFX for Outlook and IPFX for Lotus Notes].

This allows you to customise the view of your Directory without affecting other users, e.g. if you wish to see the Directory columns in the order of extension number, first name, last name, department, location, mobile number, etc.

Please see your Administrator for access privileges if required.

- Click on the Directory Fields button -
- The screen below displays

**Show Fields** Select the fields you would like to show in your personal extension directory...

(Fields marked with * are required, and cannot be removed from the directory view)

**Available fields:**
- Associate
- Home/Other
- Location Start Time
- Mobile
- Office Extension
- Pager
- Position

**Show these fields in this order:**
- (Status Icon)
- *Extension
- Title
- *First Name
- *Last Name
- Department
- Location
- Return Time
- Region
- *Server

**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.
**General Tab**

**This Feature** | **Does This**
---|---
Set my locations from appointments (based on keywords) | Allows you to integrate your Location settings with your Calendar options, i.e. if you set a Calendar Appointment and enter the Location within the Subject or Location fields in your email client, this will automatically update your Voicemail Location. Tick the checkbox to turn this feature on. For further information on this feature, refer [Calendar Functionality](#).

Create appointments from locations | Automatically creates an appointment in your Calendar when you change your Location. Tick the checkbox to turn this feature on.

Show virtual queues | Allows you to also view virtual queues. Tick the checkbox to turn this feature on.

Synchronises your email client’s Contacts into your IPFX Client. This will enable you to speed up CLI searching and utilise functionality in both applications without having to duplicate the entries. This feature is OFF by default. Tick the checkbox to turn this feature on.

If this feature is turned on:

- 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.

Enhanced directory

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 separate window.

Note This feature is only available in IPFX for Outlook.

(email client) owns interface

Ensures the IPFX Client's Directory and Queue view always display in front of the main email client window. Tick the checkbox to turn this feature on.

Client logging

The feature gives the user the ability to enable/disable the logging feature. This feature is OFF by default. Tick the checkbox to turn this feature on.

Do not allow supervised transfers

Disables Supervised Transfers so the user can only do a Blind Transfer. For use with Cisco 7912 phones as they can only do Blind Transfers. Tick the checkbox to turn this feature on.

View Operator Message Indicator

Places a small red dot next to extensions with associated Operator Instructions in the Directory

Max shortcuts per line

Depending on your screen resolution of your Desktop, you may have extra room at the end of each IPFX Shortcut Bar at the top of your screen for more extension shortcuts. If this is the case, you can increase this Maximum Shortcuts per line feature from the default (usually set at 8 or 10) to a higher number (i.e. 15).

Away status time (mins)

Sets a timer based on the movement of your mouse and keyboard to alert others that you may be away from your desk. The time is set in minutes, e.g. 5 equates to '5 minutes'. If you have not moved your mouse or keyboard after this time, your location icon shows a timer on it (i.e. 🕒) to advise other users that you may no longer be at your desk. Enter a value in the text box to turn this feature on.

If this feature is now on and you are a Call Centre Agent that has been temporarily 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 a 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 the IPFX 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 indefinitely 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.

---

**Feature**

**Address**

This is the TCPIP address of the CTServer. This enables your client to locate the CTServer for sending and receiving information.

**Name**

This is the alpha name of the CTServer.

**Port**

This is the port number of the CTServer.

**Extension**

This should be the same extension as your phone.

**TIP**

To check if this Extension number is correct, if you have a digital phone pick up the receiver and the extension number will show on the screen or dial another extension that has a digital phone to see what your
extension number is when it comes up on their screen.

See Also

CTI Options
General 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.

Popup call screen
This is the first of two Popup Screen options. **Popup call screen** allows you to not only view but record incoming call information (i.e. you will be able to select wrapup codes and enter notes if you have enabled these options). If you want this as your default popup screen and **Call Alerts** (below) make sure you clear the **Call Alerts** checkbox. For further information on this feature, refer to **Alerts**.

**Call Alerts**

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

**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.

**Queue Alarms**

**Note** This feature only available if an IPFX Contact Centre module is purchased.
Note 2 If you already receive alarms and this feature is not ticked, please see your IPFX Administrator as you may be set up at an incorrect Queue Level.

See Also

CTI Options
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


   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)

   ![Shortcut Form](image)

   The Shortcuts form will appear:

   ![Shortcut Form](image)

   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.

   ![Shortcut Form](image)

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:

   ![Shortcuts form]

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?
Listening to New Messages
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

Voicemail Messages
Listening to New Messages
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**

<table>
<thead>
<tr>
<th>Icon</th>
<th>Command</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Forward]</td>
<td>Forward</td>
<td>This allows you to forward the Voicemail message to another internal user (Note They must also have voicemail for it to work).</td>
</tr>
<tr>
<td>![Print]</td>
<td>Print</td>
<td>This allows you to Print the information currently displayed on your screen in an e-mail format.</td>
</tr>
<tr>
<td>![Copy]</td>
<td>Copy</td>
<td>You can copy the form and paste it into another document.</td>
</tr>
<tr>
<td>![Flag]</td>
<td>Flag</td>
<td>Will allow you to set a follow up (ie. Reminder) for this message.</td>
</tr>
<tr>
<td>![Move Folder]</td>
<td>Move to Folder</td>
<td>Move the message to another folder as done with emails.</td>
</tr>
<tr>
<td>![Delete]</td>
<td>Delete</td>
<td>This will Delete the message you have open on your screen.</td>
</tr>
<tr>
<td>![Previous]</td>
<td>Previous</td>
<td>This will allow you to go back to the previous message/e-mail.</td>
</tr>
<tr>
<td>![Next]</td>
<td>Next</td>
<td>This will allow you to go forward to the next message/e-mail.</td>
</tr>
<tr>
<td>![Help]</td>
<td>Help</td>
<td>Double click on this icon to display the Microsoft Help Screen.</td>
</tr>
</tbody>
</table>

**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.

In This Section

- Saving money by specifying Remote Access
- See Also
  - Remote Voicemail Access
numbers
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):
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.
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.

<table>
<thead>
<tr>
<th>In This Section</th>
<th>See Also</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Alerts and CRM Integration</td>
<td>Alerts</td>
</tr>
<tr>
<td></td>
<td>Location Notification alerts</td>
</tr>
</tbody>
</table>
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 button on the IPFX 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).

![Callers in Voicemail](image)

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.

![View Call History](image)

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.

![Menu Display]

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):

<table>
<thead>
<tr>
<th>Set Location...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open...</td>
</tr>
<tr>
<td>Dial...</td>
</tr>
<tr>
<td>Answer...</td>
</tr>
<tr>
<td>Hold...</td>
</tr>
<tr>
<td>Hold Port...</td>
</tr>
<tr>
<td>Afterwards Hold...</td>
</tr>
<tr>
<td>Hold Resume...</td>
</tr>
<tr>
<td>Queue Resume...</td>
</tr>
<tr>
<td>Pickup...</td>
</tr>
<tr>
<td>Conference...</td>
</tr>
<tr>
<td>Merge...</td>
</tr>
<tr>
<td>Exclude...</td>
</tr>
<tr>
<td>Cancel...</td>
</tr>
</tbody>
</table>

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.

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

*Note Options in this section are specific to the Application you are using. For further information please refer to Directory Integration.*
Listen

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.

**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.

Record

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.

**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:

<table>
<thead>
<tr>
<th>This Feature</th>
<th>Does This</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Information</td>
<td>Allows Caller Information to be displayed in Popup Screen.</td>
</tr>
<tr>
<td>Call List</td>
<td>Displays a list of calls for your extension.</td>
</tr>
<tr>
<td>Wrapup Codes</td>
<td>Displays Wrapup Codes for selection when a call is finished (if applicable).</td>
</tr>
<tr>
<td>Auto Select</td>
<td>Displays the wrapup folder for the active call state (ie. outbound, incoming, queue)</td>
</tr>
<tr>
<td>Wrapup Folder</td>
<td></td>
</tr>
<tr>
<td>Notes</td>
<td>Displays a screen to enter any relevant notes.</td>
</tr>
<tr>
<td>Use Alert</td>
<td>Displays Incoming calls in your 'Toast' Popup.</td>
</tr>
<tr>
<td>Notification</td>
<td></td>
</tr>
<tr>
<td>Show on Outbound</td>
<td>Allows Screen to popup when outbound calls are made.</td>
</tr>
<tr>
<td>Show On Incoming</td>
<td>Allows Screen to Popup when a call is Incoming.</td>
</tr>
<tr>
<td>Show on Wrapup</td>
<td>Show Screen Popup on Wrapup.</td>
</tr>
<tr>
<td>Hide on Release</td>
<td>Allows Screen to disappear upon hangup.</td>
</tr>
<tr>
<td>Hide on Wrapup</td>
<td>Allows Screen to disappear upon hangup.</td>
</tr>
<tr>
<td>Beep on New Call</td>
<td>Incoming call will beep via Multimedia Speakers.</td>
</tr>
</tbody>
</table>
Show Queue Time | Shows the length of time that the call has spent in the queue.
Always on Top | Ensures Pop Screen always displays on top of any other open screens.
Show button Captions | Displays captions under the buttons on the Pop Screen Menu Bar.
Large Icons | Resizes the icons on the toolbar.
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.

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.

Note When both Popup call screen and Call Alerts boxes are checked, Call Alerts is the default popup screen.
How to resize your Popup Screen

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

1. Place the mouse over the bottom right hand corner of the Popup Screen to enable the resize icon. (The mouse pointer changes to a double pointed arrow).

2. Click, hold and drag to the desired size.

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

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

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

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

![Options Menu](image)

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

![Current Calls](image)

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

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**Extension Usually Used:**

**Supervisor:**

### See Also
- [Queue Notes](#)
- [Wrapup Codes (if used)](#)
# Wrapup Codes (if used)

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## See Also
- Queue Notes
- Queues in which I am an agent
1. The Location screen for your extension will appear:

![Location Screen](image)

2. Click on the specific **Location icon** that corresponds to your availability.

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

4. Click **OK** to save your new location.

**See Also**

*Setting your location in IPFX for Outlook*