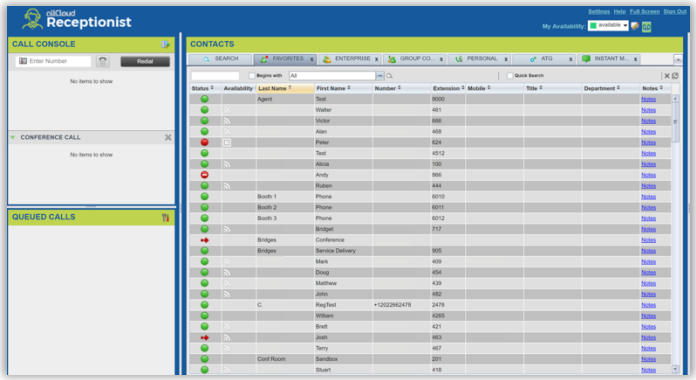
Quick Reference Guide

AllCloud Receptionist Console



Launch the AllCloud Receptionist Console

1. As the assigned user, log into the Allied customer web portal, AllCloud Connection at https://connection.alliedtelecom.net.
2. Using the **Applications** dropdown, select **Receptionist Console** to launch the Receptionist Console.
3. Log in using your AllCloud credentials.

Set Initial Preferences

Below are some preferences we recommend you set.

1. From the Receptionist Console, click on **Settings**, then change the following:

General Tab

a. **Workspace**: Select to "Always save workspace on signout".

b. **Drag and Drop**: Select "Transfer the call automatically when it's dropped on a contact".

Plug-ins Tab

a. **Plug-ins**: Select "Disable All Plug-ins".

2. Click "**Back to Application**" to return to the Receptionist Console.

Manage Calls

Dial Contact

1. In the Contacts pane, click the target directory tab.
2. Click the contact and then click **Call** for that contact.
3. To dial the contact's alternate number, if available, click the right Call CALL button and select the number from the list.

Note that alternate numbers for contacts must be added in the user's AllCloud profile within AllCloud Connection in order to be viewable in the Receptionist Console.

Dial Ad Hoc Number

In the Dialer, enter the number and click **Dial**.

Redial Number

Up to 10 previously, dialed numbers are available.

1. In the Dialer, click **Redial**. A list of recently called numbers appears.
2. From the list, select the number to call.

Dial from Call History

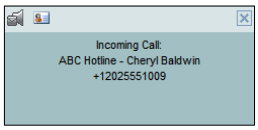
1. In the Call Console, click **Call History**.
2. In the dialog-box that appears, select Placed Calls, Received Calls, or Missed Calls from the Show drop-down list.
3. Click a call log and then click **Call** for that log.

View Current Calls

Your current calls are always visible. To display the details of the conference call, click the **Expand** button in the Conference Call panel.

View Incoming Calls Details

If the Call Notification feature is enabled, a notification window appears on top of the system tray when you receive a call, displaying the name and number of the caller.



Answer Call

In the Call Console, move the mouse over an incoming call and then click **ANS** for that call.

Hold Call

Note that this function is not available from a remote office.

In the Call Console, move the mouse over the call and then click **Hold** for that call.

Resume Call

Note that this function is not available from a remote office.

In the Call Console, move the mouse over the call and then click **ANS**.

End Call

In the Call Console, click **END** END for the call to end. The call is removed from the Call Console.

Blind Transfer

Calls can be blind transferred while active, held, or ringing (in).

1. In the Call Console, select the call to transfer.
2. To transfer the call to an ad hoc number, enter the number in the Dialer and then click **Transfer**.
3. To transfer the call to a contact, click a contact in one of the Contacts directories and then click **TXR** for that contact. Alternatively, drag the call onto the target contact and click TRX for that contact.
4. To transfer the call to the contact's alternate number, if available, click the right Transfer **button** TXR and select the number form the list.

Transfer with Consultation

Calls can be transferred while active, held, or ringing (in).

1. Dial the number or contact to whom you want to transfer the call.
2. When the call is answered, speak to the party.
3. In the Call Console, select the call to transfer.
4. Move the mouse over the new call and then click **TXR**.

Transfer to Voice Mail

Note that with Drag and Drop Transfer enabled, calls can be transferred by dragging the call from the Call Console onto a contact in the Contacts Pane.

1. In the Call Console, select the call you wish to transfer.
2. In the Contacts pane, click a contact with voice mail (in the Group/Enterprise or Favorites directory) and then click **VM** for that contact.
3. To transfer the call to your own voice mail, select yourself.

Directed Call Pickup

You can answer a call on behalf of another person.

1. In the Contacts pane, click the **Group**/**Enterprise** or **Favorites** directory tab.
2. Click a ringing contact and click **ANS**. The call appears in the Call Console.

Start Three-Way Conference

1. If necessary, place calls to participants.
2. In the Call Console, select one of the calls to conference.
3. Move the mouse over the non-selected call and then click **CONF**. The calls are moved to the Conference Call panel.

Hold Conference

To hold the conference, in the Conference Call panel header, click **HOLD**.

Resume Conference

To resume the conference, in the Conference Call panel header, click **ANS**.

Hold or Resume Conference Participant

- To place a participant on hold, click **HOLD** for the target call.
- To resume a participant, click **ANS** for the target call.

Leave Conference

To leave the conference, click **LEAVE** in the Conference Call panel header. The other parties stay connected but the calls are removed from the Conference Call panel. Note that you can only leave a Three-Way conference.

End Conference

To end the conference, click **End** in the Conference Call panel header. The calls are terminated and removed from the Conference Call panel.

Send E-mail to Contact

Note that emails can only be sent to users who have added their email address to their AllCloud profile in AllCloud Connection.

1. Click the target directory tab.
2. Click a contact with e-mail and then click **EMAIL**.
3. In the message window that appears, enter the required information and then click **Send**.

View Call History

1. In the Call Console, click **Call History** . The Call History dialog box displays your placed, received, and missed calls.
2. To view call logs in a group, select the group from the Show drop-down list.

Receptionist Interface

The main elements of the Receptionist interface include:

- Call Console
- Contacts Pane
- Settings and Help Links

Call Console

The Call Console is where you manage your current calls. It contains the following:

- The main area of the Call Console lists your current calls and allows you to perform actions on them.
- *Dialer* – This allows you to make ad hoc calls and redial up to 10 of the most recently dialed numbers.
- *Conference panel* – This lists the call legs of your current conference call and allows you to take actions on conference calls.

For each call, the name and the phone number of the remote party (if available), the call state, the duration of the call, and for held calls, the time the call has been on hold, are displayed.

Contacts Pane

You use the Contacts pane to call, monitor, and manage your contacts. The pane lists available contact directories.

- *Favorites* – Contacts whose status you are (statically) monitoring, which are configured on the web portal
- *Group/Enterprise* – Contacts in your enterprise or group
- *Group/Enterprise Common* – Contacts in your group's or enterprise's common phone list on AllCloud Connection
- *Personal* – Contacts in your Personal directory on AllCloud Connection
- *Speed Dial* – Speed dial numbers configured for your Speed Dial 8 and/or Speed Dial 100 service
- *Queues* – Your call centers
- Instant Message – Your monitored IM&P contacts
- *Custom* – Contacts in your custom directories on the web portal
- *Managed Contacts* – Contains dynamically managed contacts.

The Contacts pane also contains the Search tab and capabilities, which you use to search for contacts.

Settings, Full Screen, and Help Links

- The Settings link, when clicked, displays the Settings page, allowing you to configure the Receptionist Console.
- The Full Screen link, when clicked, displays the Receptionist main window in full-screen mode.
- The Help link, when clicked, opens the AllCloud Receptionist Console User Guide in PDF format.

Manage Contacts

Show Directories

1. At the top of the Contacts pane, click the drop-down arrow to the right of the directory tabs.
2. From the list that appears, select the directory to display. The directory tab displays at the top of the Contacts pane and its contents appear in the Contacts pane.
3. To remove a directory tab from the Contacts pane, click the **Close** button on the tab for that directory.

Make Notes about Contact

You can make notes about contacts in the Group/ Enterprise, Favorites, Custom, or Monitored directories.

1. Click the target directory tab.
2. Click the **Notes** link for the contact.
3. Enter or modify information in the Notes for <Contact Name> dialog box.
4. To save your changes and close the dialog box, click **OK**. To close the dialog box without saving, click **Cancel**.

Manage Speed Dial and Personal Directories

1. In the Speed Dial or Personal tab, click **Edit**. The Edit Speed Dials/Edit Personal Contacts dialog box appears.
2. To add an entry, click **Add**. A new row appears.
   - For a Speed Dial entry, select the dial code and enter the number and description of the contact.
   - For a Personal entry, enter the name and number.
3. Do delete an entry, select the entry, and then click **Delete**.
4. To modify a Speed Dial entry, double-click the entry to make it editable and then modify it as necessary.

Note that you cannot modify a Personal entry.

Perform Quick Search

1. Select the directory to search and order it by the column to search.
2. Check the **Quick Search** box.
3. From the keypad that appears, select a single character. The contacts that start with the selected character (in the selected column) appear in the directory.

Perform Regular Search

1. Select the directory to search or click the **Search** tab to search in all directories.
2. If searching in a specific directory, make sure that the Quick Search box is unchecked.
3. In the Search text box, enter the text for which you want to search. You can enter partial information (at least two characters).
4. To restrict the search to contacts that start with the entered string, check the Begins with box.
5. If searching in a specific directory, select the column to search by from the drop-down list. You can select a specific column or all columns. In the Search tab, all columns are searched.
6. Click the **Search** button.

Create Directory from Search Results

1. Perform a search on a single column in a specific directory.
2. When the results appear, click the **Pullout button**. A new tab is created that contains the results of the search.

Note that, once closed, a search results tab cannot be reopened.

Instant Messaging

If you and your contacts have the Instant Messaging and Presence service assigned, you can chat with your contacts and monitor their presence. *For more information about this service, please contact Allied or your system Administrator.*

Monitor Instant Messaging and Presence (IM&P) Contacts

To monitor the IM&P state of a contact, you first need to subscribe to the contact within the receptionist console.

1. Within the contacts pane, on the Favorites or Enterprise tab, click the IM&P chat icon in the IM column. If you are not subscribed to this contact, you will be asked if you wish to do so. Select **Yes** to subscribe to the contact.

Set Your IM&P State and Message

1. Click the **Presence** box at the top right-hand side of the main window and select your new state from the drop-down list.
2. Click **Edit** next to the Presence box and enter a message to display to other IM&P users in the dialog box that appears.

IM&P States

The possible states are Available, Busy, Away, and Offline. In addition, the following states are displayed in some directories, for IM&P users you are not monitoring: Not Subscribed and Pending Subscription.

Accept IM&P Subscription Request

When you receive a request from another user, to accept the request, click Yes in the dialog box that appears. The contact is added to the Instant Message directory, if it is not there.

Chat with Contact

1. To chat with one of your IM&P contacts, click the **Chat** button for the contact. A chat window appears.
2. Enter your message in the text box at the bottom of the window and press **ENTER**.

You can have more than one chat window open. You can also accept chat requests from contacts.

Create a Multi-User Chat

1. Click the Add button in a current chat window. A drop-down list of available contacts appears.
2. Check the check box next to each contact to invite to the chat and click the Invite button. When a contact joins the chat, a notification appears in the log area of the chat window.
3. To leave the chat, close the dialog box.

Note that you can only perform a multi-user chat with contacts with whom you are subscribed to. To view contacts you are currently subscribed to, go to the IM tab within the console.

Keyboard Shortcuts

When using keyboard shortcuts, make sure that the main interface window is in focus.

Key	Equivalent Mouse Action
ESC	Click the **Close** button in a dialog box.
ESC	Cancel the changes.
/	Click the *Dialer* text box.
?	Click the *Search* text box.
ARROW DOWN	Click the scroll bar or the next item on a list.
ARROW UP	Click the scroll bar or the previous item on a list.
PAGE DOWN	Scroll down one page.
PAGE UP	Scroll up one page.
1....9	Select a call in the *Call Console*.
SPACEBAR	Click **Answer** on the selected incoming call in the *Call Console*.
<PERIOD>	Click **End** on the selected call in the *Call Console*.
ENTER	Click **Dial.**
ENTER	Click **Search.**
+	Click **Transfer** in the *Dialer*.
SHIFT+1..9	Select a ringing call and click **Answer**.
SHIFT+1..9	Select an active call and click **Hold**.
SHIFT+1..9	Select a held call and click **Retrieve**.
S or s	Click the **Settings** link.
B or b	Click the **Back to Application** link.
R or r	Click the **Call History** button.
H or h	Click the **Help** link.
SHIFT+L or SHIFT+l	Click the **Sign Out** link.