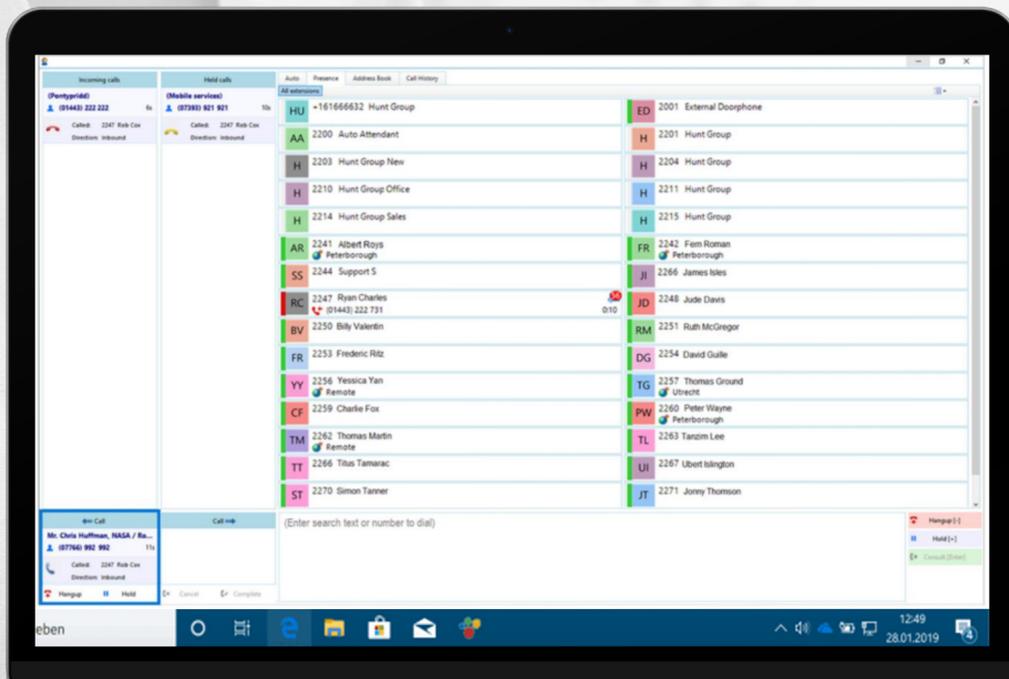




Receptionist Client Quick Start Guide





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1 Product Overview



First Impressions last:

The intuitive graphical interface provides all the functionality required to make intelligent decisions for every call.

The Catalytic Receptionist Client is a PC based full-screen receptionist console that works with an IP handset or soft client to manage the distribution of inbound calls in an efficient manner.



How you Benefit

Easy to Learn

Transferring calls to the desired recipient is sorted with the click of a mouse on the intuitive graphical interface, overcoming the limitations of BLF lists and extended keypads.

Stay in Control

The Presence window allows reception users to see the availability status of their colleagues across the organisation and make intelligent decisions before blindly transferring calls.

Built to Scale

The Catalytic Receptionist Console leverages the power of the Catalytic cloud-based hosted PBX to monitor the presence status of up to 250 users across multiple sites or home offices.

Empower your reception with powerful features:

Up to 250 users

Realise the full potential of your hosted telephony solution by monitoring up to a maximum of 250 users

PC call control

Call control from the PC environment using mouse, keyboard or touch screen capability

Easily view availability

Use a wallboard-type view to check the availability status of staff



Serious System features:

- Use it to manage users across multiple sites
- Easily answer, transfer, hold, consult and make calls
- View all waiting calls and answer in any order
- Screen popping for incoming calls
- View call history, allowing the operator to easily review and return calls



2 Using this Guide

This quick reference guide will help you gain the most out of your Receptionist Console

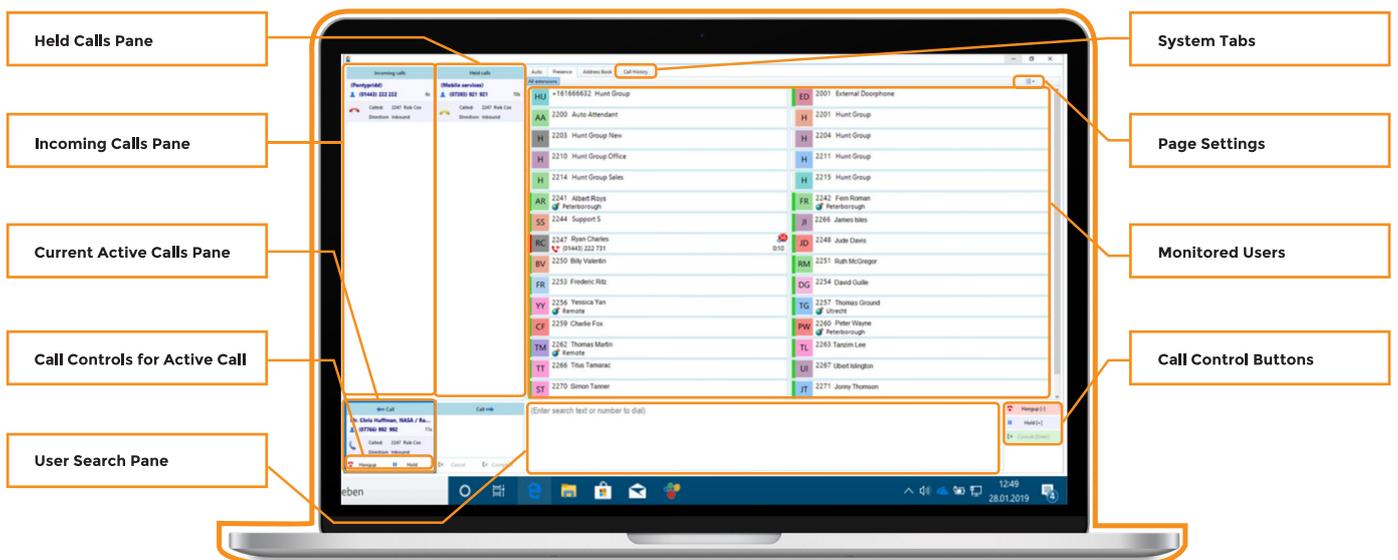
We'll cover basics to help you get started right away and we'll give you tips to leverage the range of features and benefits to your business' advantage.

For further assistance contact email support@catalytic.co.za or call 087 945 0006

3 The Receptionist Client application layout

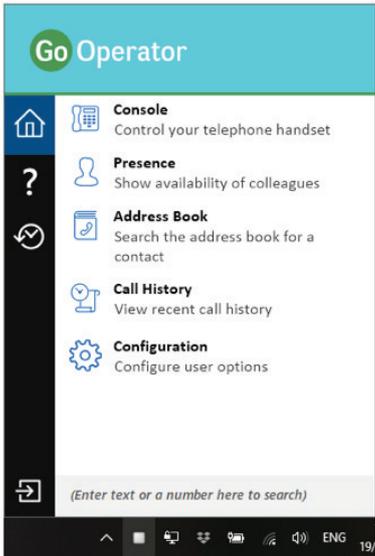
The application is divided into three sections:

1. The left-hand side of the application contains the call handling interface. This area shows the calls currently ringing, on hold, in progress or being transferred.
2. The top right hand side of the application contains the details of the Auto, Presence, Address Book and Call History tabs.
3. The bottom right section contains the search and call control buttons.





4 To launch the Receptionist Client application



- Receptionist Client runs in the system tray.
- The System Tray Menu is accessed by right-clicking on the Go Operator icon, which is a green square (or red if you're on a call or yellow if a call is on hold).
- Select the Console option to see the application in full screen.

5 Call Control

Answering and transferring of calls can be controlled using the keyboard and mouse. The Numeric Keypad input functions can be configured to work only when the application is open or to work at all times. This is set in the system configuration settings.

Note: Please note that the Receptionist Client only provides call control functions – answer, on-hold, transfer and end. All audio functions are provided by a IP handset or soft client.

Using the keyboard to control calls

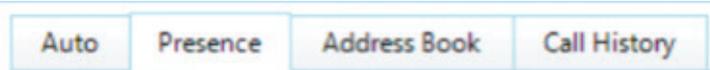
Using the PC keyboard is the most efficient option method of handling high call volumes. The table below describes the key actions.

 Make call [Enter]	Make a call	Type in the number you wish to call in the text field and press 'ENTER'.
 Answer [Enter]	On Ringing	To Answer an incoming call press 'ENTER'.
 Hangup [-]	Active Call	To Hang-up an active call, press the '-' (minus) key on the numeric keypad.
 Hold [+]		To place an active call on Hold, press the '+' (plus) key on the numeric keypad.



Hold [+]	Un-hold a call	Click '+' to access Held calls. The Held calls will be numbered 1, 2, 3 etc. Press '+' again to toggle between held calls, the call with number highlighted in black is activated after a few seconds and taken off hold.
Consult [Enter] Cancel [-] Complete [Enter]	Consult Transfer	To initiate a Consult Transfer, type the number of the extension you wish to Consult Transfer to in the text field and press 'ENTER'. To cancel the Consult Transfer, press the '-' (minus) key. To complete a Consult Transfer press 'ENTER'.
	Transfer from Presence Tab	Start typing the name or number of the extension you need to transfer the call to. When the extension shows, use the mouse to highlight it and the press 'ENTER' to start the consult transfer and 'ENTER' again to complete it.
	Transfer from Address Book Tab	Once the call is answered select the Address book tab and type the name of the external contact you wish to transfer the call to. Use the up/down cursor key to scroll through the results and press 'ENTER' to start the consult transfer and 'ENTER' again to complete it.
Clear [-]	Clear	To Clear the text field, push the '-' (minus) key.

6 System Tabs



The section describes the function of each of the system tabs

Sam Simons

0159

Contacts

Display name: Sam Simons

Contact: Sam Simons

Phone: 0159

Phone:

Phone:

Email:

Location: Internal call

6A Auto

The Auto tab is the first of four pages, where you find essential and useful features to make the calling process more effective. The Auto window provides access to the relevant information of the person who is calling.

When a call is connected you will be able to see two types of information.

- The "Auto" tab will auto-populate the "Recent" section with a list of extensions that have been assigned to the same department as the called extension.
- The Auto tab will also show caller preview data for any integrated CRM application and a customized greeting linked to the dialled DDI number.



Auto	Presence	Address Book	Call History
All extensions			
AV	0158	John Smith	
BT	0164	John Smith	
C	0168	John Smith	
HP	0160	John Smith	0:36
		Samsung A20	
JV	0151	John Smith	
RR	0156	John Smith	
T	1111	John Smith	
YA	0166	John Smith	

6B Presence

This is the most commonly used tab and provides a quick way to check the extension status of extensions within the organisation.

The content of the display can be controlled to define and limit which user extensions are displayed using the page settings options. User extensions can also be sorted by alphabetically or by number and can be grouped by department.

Grouping by Department: Users must be assigned to departments on the Broadworks platform by your service provider

Customized extension pages can also be created by selecting extensions using 'CTRL', and 'ENTER' and the right clicking with the mouse and selecting "Add to page".

Productivity TIP: Using grouping and custom extension pages when monitoring high numbers of users helps in identifying other users is similar roles or departments who may be suitable to take a call.

If you click on a user extension entry in the Presence list, a context menu will appear.

If you are not on a call, then the menu will contain the **Make call** option. By choosing this action, you can dial the extension directly.

If you have an active call, you will have the option of **Consult** and **Transfer**. Click these options to initiate a consultative or blind transfer as required.

You can also start a consult transfer to a colleague by double-clicking on their extension.

Send an Email Message: If the user that you wish to transfer a call to is currently busy you will also have the option to email them. This requires that their email address is configured on the Broadworks platform and will also require that an email client is installed on the same PC as the Operator client.

The status indicators on the user extensions represent the

H solid green means that the extension is ready to receive a call

H flashing yellow means that there is a held call at the extension

H solid red means that the extension is busy on a call

H solid grey is used for hunt groups and ACD queues.



6C Address Book

The address book tab is used to concurrently search all the integrated directories and then either make a call to or transfer an active call to any of the contacts (internal or external) returned by the search. It also gives the option to “pop” their contact record.

Auto	Presence	Address Book	Call History
Name	Telephone	Email	Town
Contacts			
SS Sam Simons	E: 0159 D: +27 0 000 0000 000 M: +27 0 000 0000 000		

The integrated directories consist of your corporate directory of users configured on the Broadworks platform and any CRM systems that have been added through the configuration menu.

Address Book Integration: In addition to internal corporate contacts the Receptionist Console allows you to integrate with a number of CRM systems to ensure that corporate contacts are easily accessible. Please speak to your service provider should you require assistance with integrating into supported CRM systems.

Call History
Yesterday
MJK John Smith +27 0 000 0000 000 11:18:06
JCA John Smith +27 0 000 0000 000
25/05/2017
ID John Smith +27 0 000 0000 000 15:45:19
IS John Smith +27 0 000 0000 000 10:31:55
WR John Smith +27 0 000 0000 000 08:30:22
24/05/2017
LUK John Smith +27 0 000 0000 000 16:16:39
MJK John Smith +27 0 000 0000 000 14:00:54
RDJ John Smith +27 0 000 0000 000 14:00:12

6D Call History

The “call history” option displays a list of your most recent inbound and outbound calls, and it also displays any missed calls.

Any active call can be quickly transferred to a call listed in this screen.

It also gives the option to “pop” their contact record.



7 Preview Window

If the Receptionist Console window is minimized the Preview Window will “pop-up” when an inbound or outbound call is ringing

Outgoing call: Connected

JCA Joe Cartwright, Acme Ltd.
+44 20 79460123 | London, United Kingdom

Important customer! Usually needs to speak to Ian Deacon on 3004.

Call controls: Answer, Deflect, Hang Up, Hold, Consult, Transfer, Show Contact, Add Contact, Pop Contact

Call duration: 20s

- Direction of call
- Caller Details (number, location) obtained from the PPL, Broadworks Directories or Integrated Application
- Caller Notes
- Show full caller details

The Preview Window automatically disappears shortly after the call has connected.

8 Call Controls

The following call controls are available through the Preview Window.

	Answer	When a call is ringing, you can choose to answer the call by clicking the "Answer" button or deflecting it (transfer it without answering it) to another extension.
	Deflect	
	Hang Up	End the call.
	Hold	Pause the call. The caller will hear hold music if available.
	Consult	Place the current call on hold pending a transfer and makes a concurrent call to the selected extension.
	Transfer	Transfers the call immediately to the selected extension (remember to say goodbye first!)
	Show Contact	Shows the caller's full contact details, as obtained from the Personal Phone List (PPL)
	Add Contact	Add the caller to the Address Book and fill-in their details during the call.
	Pop Contact	Shows the caller's full contact details from the CRM or other integrated application. The icon will be that of the application (example shown here for Outlook).



catalytic

it's the *connection* that matters



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