

# COMMPILOT CALL MANAGER

The screenshot shows the BroadSoft Call Manager interface for user John Smith (5551234567 Ext: 4567). The interface includes a top navigation bar with 'Support', 'Help', and 'Configure' links. Below this, the user's name and extension are displayed. Service status options are shown: DND (unchecked), CFA (unchecked), and RO (checked). A profile dropdown menu is set to 'None'. The main area features an 'Enter Phone Number' field and several call control buttons: Dial, Redial, Transfer, and Send to VM. A large empty box is present for call details. On the right side, there are buttons for Answer, Hold, Conference, and End. At the bottom, a tabbed interface includes 'Attendant', 'Enterprise', 'Personal', 'Call History', 'Outlook', and 'Options'.

## To Initiate a Call

1. Select a phone list from the available tabs.
2. Select a phone number. Click the phone number to populate the Dial Number text box.
3. Click the **DIAL** button or press Enter.
4. The user's phone rings. After the telephone handset is lifted, Call Manager rings the called party. When making a second call, clicking the **DIAL** button automatically holds the existing call.

**NOTE 1:** Phone numbers can be entered into the Enter Phone Number field using the keyboard, or they can be dialed on the telephone.

**NOTE 2:** To create a phone list, see the *Phone List* section.

## Answer a Second Call

To answer a second call, the telephone handset must be picked up on the initial call.

1. In the Call Control area, click the required call to answer.
2. Click the **TALK** button. This holds the existing call automatically.

## End a Call

To end a call the user is on:

1. In the Call Control area, click the required call to be released.
2. Click the **HANG UP** button. This ends the call.

**NOTE 1:** If all calls have been released, the telephone handset must be replaced before initiating another call.

**NOTE 2:** If you click **HANG UP** while ringing, the call is not released immediately. It eventually goes to Voice Mail if set to "Forward a Call on No Answer".

## Place a Call on Hold

1. In the Call Control area, click the required call to be held.
2. Click the **HOLD** button. The call is now held.

## Remove a Call from Hold

1. In the Call Control area, click the required held call.
2. Click the **TALK** button. The call is now off hold.

## Redial a Call

1. Click the **REDIAL** button.
2. If there are no other active calls, the user's phone rings. After the telephone handset is lifted, Call Manager then rings the called party. The Enter Phone Number box does not populate with the number.

## Three-Way Conference Call

You must have the Three-Way Call service assigned to do the following:

1. Answer or initiate the first call.
2. Answer or initiate the second call. This action typically holds the first call (check your device and firmware).
3. Click the **CONFERENCE** button.
4. All calls are connected.

**NOTE 1:** To release one party of the conference call, select the required call in the Call Control area and click **HANG UP**. To mute the call, click **CONFERENCE**, and then **HOLD**.

**NOTE 2:** While engaged in an active conference call, click **TRANSFER**. The two calls remain connected and the user is disconnected.

## Blind Transfer a Call

You must have the Blind Transfer service assigned to do the following:

1. In the Call Control area, click the required call to transfer.
2. Select the phone number using the tabs or enter it using the keyboard. The selected number is displayed in the Dial Number text box.
3. Click the **TRANSFER** button.

## Transfer with Consultation

You must have the Transfer with Consultation service assigned to do the following:

1. In the Call Control area, click the required call to transfer.
2. Click the **HOLD** button.
3. Select the phone number using the tabs or enter it using the keyboard. The selected number is displayed in the Dial Number text box.
4. Click the **DIAL** button. You are now able to speak in the active call.
5. Click the **TRANSFER** button (there is no number in the Dial Number box).
6. The two existing calls are now connected.

## Send a Call to Voice Mail

You must have the Voice Mail service assigned to do the following:

1. While the phone is ringing and the call is displayed, click the required call in the Call Control area.
2. To send to your voice mailbox, click the **SEND TO VM** button.
3. To send to the voice mailbox of another user, enter the user's extension in the Dial Number box and click **SEND TO VM**.

## Activate Do Not Disturb, Call Forwarding Always, or Remote Office

Check the corresponding Service Status check box to activate a profile.



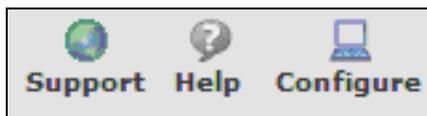
Service Status:  DND  CFA  RO

The abbreviations are as follows:

- **DND:** Do Not Disturb
- **CFA:** Call Forwarding Always
- **RO:** Remote Office

## System Buttons

The following are the system buttons for Call Manager:



- **SUPPORT:** Open a new e-mail message in your default mail client to report a problem to customer support. An e-mail is automatically populated with the address of the technical point-of-contact to whom it is delivered. The subject is "Problem encountered by [your name][UserID][GroupID]". In the body, enter your problem or question.
- **HELP:** This opens page-specific instructions and help.
- **CONFIGURE:** This allows the user to access the service customization pages.

## CommPilot Express

You can manage your incoming calls according to the CommPilot Express profiles. Go to the *Outgoing Calls – CommPilot Express* service configuration page to enter your profile information.



Profile:  ▼

Click the drop-down list in CommPilot Call Manager to select your current status. Following are the configurable options:

### Available - In the Office

This indicates how you want calls handled when you are in the office. Choices include ringing additional phones when your main phone rings and what to do if your phone is busy or if you do not answer.

### Available - Out of the Office

This indicates how you want calls handled when you are available to receive calls but are out of the office. You can forward all calls to your current location or have Voice Messaging answer the call. You can also have an e-mail notification sent, indicating the date and time a call is received.

### Busy

This indicates how you want calls handled when you are busy. Options include forwarding calls from selected numbers, sending all calls to Voice Messaging, and having an e-mail notification sent that indicate the date and time when a call is received.

### Unavailable

This indicates how you want calls handled when you are not available, such as when you are on vacation or on extended leave. You can forward calls from selected numbers and specify a Voice Messaging greeting to be heard by all callers.

### None

If you select this option, none of your profiles are in use. Any other services you may have activated are used to handle incoming calls.

**NOTE 1:** Precede a forwarded phone number with a Feature Access Code to initiate that service.

**NOTE 2:** You should not configure other services, such as Call Notify, Call Forwarding, or Simultaneous Ringing if you use CommPilot Express.

## Phone Lists

To expose a phone list, click the corresponding tab (for example, Personal) at the bottom of Call Manager. To close the phone list, click the tab again.

To populate the Dial Number text box with a phone number in a list, click the required contact.

**NOTE:** If One-Click Dialing is enabled on the Options page, the call processes when clicked.



### Attendant

The **ATTENDANT** list is configured by the group administrator and is accessible as a dial list when used in conjunction with Call Manager. It monitors users who are assigned to you. Use the **SUMMARY** and **DETAIL** buttons to open new browser windows with complete phone lists for printing.

### Group

The **GROUP** list is configured by the group administrator and accessible as a dial list from the CommPilot Call Manager tab. Use the **SUMMARY** and **DETAIL** buttons to open new browser windows with complete phone lists for printing (this only appears if you are a member of a group).

### Enterprise

The **ENTERPRISE** list is configured by the group administrator and accessible as a dial list from the CommPilot Call Manager tab. Use the **SUMMARY** and **DETAIL** buttons to open new browser windows with complete phone lists for printing (this only appears if you are a member of an enterprise).

### Personal

The **PERSONAL** list is created and edited by users. The list allows users to create their own list of frequently called numbers. Text files of names and phone numbers can be loaded to the Personal list using the import feature.

To add phone numbers to your Personal list, go to the *Outgoing Calls – Personal* service configuration web page.

### Call History

The **CALL HISTORY** tab displays information on received, placed, and missed calls. If this is not configured, it is not visible.

## Outlook

The **OUTLOOK** tab is a list of Outlook contacts and their details. Clicking on a user displays their V-card. If this is not configured, it is not visible.

## LDAP

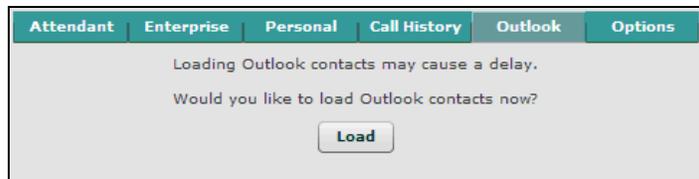
The **LDAP** tab is a list of contacts from your LDAP directory. Enter search criteria in the LDAP text box to search for individual contacts. If this is not configured, it is not visible.

## Outlook Integration

Outlook, once integrated, shows all Outlook contacts in Call Manager. To see all Outlook contacts, click the **OUTLOOK** tab. Click the tab again to close this.

To load all contacts, click **LOAD** in the tab box. To expose newly entered contacts, click **REFRESH**.

**NOTE:** If you have over 1,000 contacts, a longer load time might be expected.



To show the V-card of a contact, click the contact's name or card icon in the Call Control area. If a called or calling party has a V-card, a card icon is shown to the left of their name.

The scroll bar can be used to view up to 25 contacts. Contacts who are not displayed can be searched for or found using the **FIRST PAGE**, **PREVIOUS**, **NEXT**, and **LAST PAGE** buttons.

**NOTE:** Upon initial use of the Outlook Contacts list, click **Yes** in the Security Warning dialog box to install and run the BroadSoft component permitting access to Outlook Contacts.

## Search

To search for a contact in the **OUTLOOK** tab complete the following:

1. Select the search criteria from the drop-down menu.
2. Enter search criteria in text box.
3. Click **SEARCH**.



Up to 25 contacts that meet the search criteria can appear. To reduce this further, search again with a more specific criteria, or use paging buttons to view additional search results.

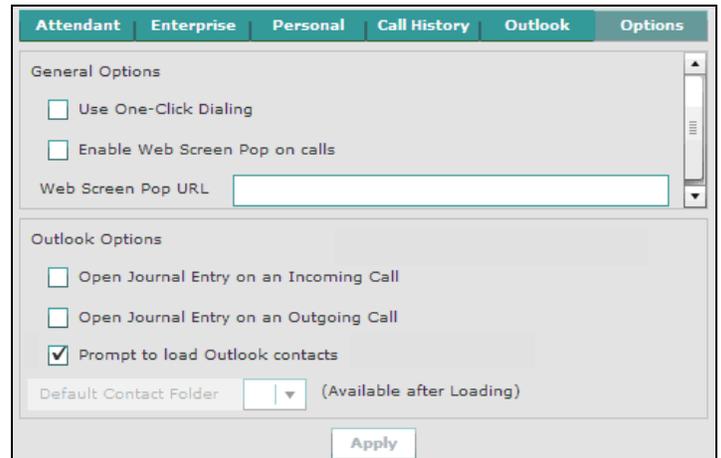
Contacts who are newly entered in Microsoft Outlook appear when **REFRESH** is clicked.

**NOTE 1:** If the CommPilot Call Manager is started before Outlook, Microsoft prompts you to verify your settings. Click **OK** to continue. To avoid this dialog box, open Outlook before starting CommPilot Call Manager.

**NOTE 2:** Outlook Integration defers contact loading until confirmation has been received. To load all Outlook contacts, click **LOAD** and wait for the *Available after loading* message. To skip the warning dialog, uncheck *Prompt to load Outlook contacts* in Preferences.

## Options

The **OPTIONS** tab allows you to configure miscellaneous choices.



- *Use One-Click Dialing* allows you to automatically call a user when their contact number is clicked. This requires a Network Server configured to dial without a "1" for long-distance calls.
- *Enable Web Screen Pop on calls* can be used for the front end of a customer database to appear for incoming and outgoing calls.
- The *Web Screen Pop URL* determines the URL that Call Manager opens when you click **WEB SCREEN POP** in the notification window.
- *Open Journal Entry on an Incoming Call* opens Microsoft journal entries on all incoming calls.
- *Open Journal Entry on an Outgoing Call* opens Microsoft journal entries on all outgoing calls.
- *Prompt to load Outlook contacts*, when checked, defers the loading time of Outlook contacts until the user specifies by clicking **LOAD** in the Outlook tab. If this is unchecked, Outlook contacts are automatically loaded upon startup.
- The *Available after Loading* text box specifies the default location for Outlook contacts.

## ATTENDANT CONSOLE

Attendant Console allows an attendant to monitor the real-time telephone status of monitored users.

**NOTE:** To add users to monitor in the console, use the Attendant Console service located in the Web Portal in the Client Applications section.

Status	Name	Number	Ext	Action
	Office3,Sydney	0285800212	0212	
	Room,Board	0285800208	0208	
	Video,Boardroom	0285800270	0270	
	Visitor1,Visitor1	0285800273	0273	

Name	Number	Duration
Cell Phone SYD	0450390765	00:32

### Monitored Users

The Monitored Users table shows all the users assigned to Attendant Console. Click the **ATTENDANT CONSOLE** tab to see the monitored users.

Column headings can be moved by clicking and dragging the column heading to different positions, or they can be resized by clicking on the column lines and dragging the column so that it is larger or smaller.

- Status** of a user. The options are: available to receive a call , on a call/busy , or Do Not Disturb .
- Name** is the name of the monitored user in the group.
- Number** is the user's main phone number for the group. Clicking the user's phone number populates the Call Manager's Dial text box, if configured.
- Ext** is the user's main extension phone number within the group. Clicking the user's phone number populates the Call Manager's Dial text box, if configured.
- Action**, when clicked, populates the Dial text box with the selected user's number.
- Department** shows the specified department the monitored user is in within the group. Clicking the column header sorts the monitored users by department.
- Title** is the prefix title given to every monitored user, if provided. Clicking the column header sorts the monitored users by title.
- Mobile** is the monitored user's mobile phone number as listed in the group. Clicking the user's phone number populates the Call Manager's Dial text box, if configured.
- Pager** is the pager number of the selected user.
- E-mail** is the monitored user's e-mail address as listed in the group. Clicking the e-mail icon of the user or the e-mail address launches a new message window in the default mail client with the "To:" address populated with the selected user's e-mail address.

### System Buttons

The following are the system buttons for Attendant Console:



- SUPPORT:** Open a new e-mail message in your default mail client to report a problem to customer support. An e-mail is automatically populated with the address of the technical point-of-contact to whom it is delivered. The subject is "Problem encountered by [your name][UserID][GroupID]". In the body, enter your problem or question.
- HELP:** This opens page-specific instructions and help.
- CONFIGURE:** This allows the user to access the service customization pages.

### Filtering

The monitored user table can be filtered by name, department, or title.



- The Filter on drop-down list allows the user to choose the way the monitored users are shown. The options are Name, Department, or Title.
- The Filter text box allows the user to enter a specific value. Once the value is complete, click **ENTER** or click the Search icon next to the box for the corresponding monitored users to be shown.

### Additional Information Tabs

The following tabs are used to display additional information.

Name	Number	Duration
Cell Phone SYD	0450390765	00:32

- The **USER DETAIL** tab shows a more detailed summary for the selected monitored user. Clicking a phone number automatically populates the Call Manager dial box with the selected number. Clicking the e-mail icon of the user or the e-mail address launches a new message window in the default mail client with the "To:" address populated with the selected user's e-mail address.
- The **CALL INFO** tab displays the names, numbers, and duration (in minutes and seconds) of the calls the user is involved in. This monitored call information is based on the selected user in the Monitored Users table.

## Making a Call Using Attendant Console in Call Manager

To make a call using the Attendant Console tab in Call Manager, complete the following.

**NOTE:** Attendant Console is only visible if it is configured.

1. Select the **ATTENDANT** tab.
2. Select a phone number of a monitored user. Click the phone number to populate the Dial Number text box.
3. Click the **DIAL** button or press Enter.
4. The user's phone rings. After the telephone handset is lifted, Call Manager rings the called party. When making a second call, clicking the DIAL button automatically holds the existing call.

**NOTE:** Phone numbers can be entered into the Enter Phone Number field using the keyboard or they can be dialed on the telephone.

The screenshot displays the Broadsoft Attendant Console interface. At the top, the user is identified as Wendell Keuneman with phone number 0285800222 and extension 0222. The service status is set to RO (Ring Out). Below this, there are buttons for Dial, Redial, Transfer, and Send to VM. A call log table shows a recent call from Wendell Keuneman (44207). To the right of the call log are buttons for Answer, Hold, Conference, and End. Below the call log is a filter section and a table of monitored users. The 'Call Info' tab is active, showing details for the user 'Video,Boardroom'.

Status	Name	Number	Ext	Action
	Video,Boardroom	0285800270	0270	
	Visitor1,Visitor1	0285800273	0273	
	Visitor2,Visitor2	0285800274	0274	
	Visitor3,Visitor3	0285800275	0275	
	Visitor4,Visitor4	0285800276	0276	

**User Detail** | **Call Info**

**Name:** Video,Boardroom  
**Department:**  
**Number:** 0285800270      **Title:**  
**Mobile:**      **Ext:** 0270  
**E-mail:**      **Pager:**