



# VistaPoint Desktop Companion End User Training



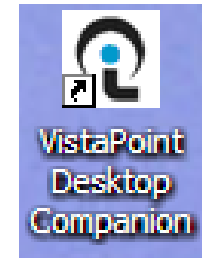
## *Features in Desktop Companion*

- Windows-Based Application
- Enterprise-wide Busy Lamp Field w/Search
- Call Processing Features
  - Drag & Drop
  - Answer, Hang-up, Transfer, Hold, Conference
  - Displays CallerID
  - Recent Call Log
- Silent Messaging
- Status Notes



# *Launching Desktop Companion the First Time*

- To launch the Desktop Companion...double-click on the icon located on your computer's desktop.



Double-click on this icon



# Launching Desktop Companion the First Time

When the User Information dialog box appears, enter your extension number and name

**User Information**

My extension number:

My user name:

OK Cancel

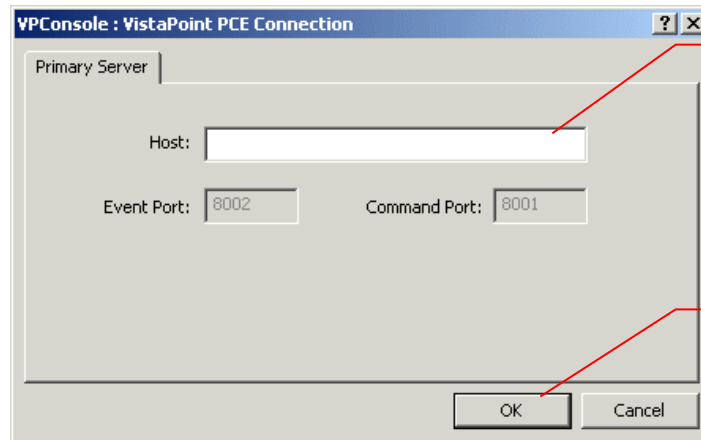
Enter your extension number here

Enter your name here



# Launching Desktop Companion the First Time

When the VistaPoint PCE Connection setup dialog box appears, enter the server name or IP address of the VistaPoint server



Enter the VistaPoint server's name or IP address here.

Then click OK



# Launching Desktop Companion the First Time

The Main Window will appear...

Sue Anderson @ 4009 - VistaPoint Desktop Companion

File Edit View Calls Extensions Settings Help

Answer Hold Transfer Hang up Call pickup Send to voicemail Create conference Park Unpark

Number to call 3405 Call Update BLFs Recent call log Send IM DND Add comment

Call List for 4009

Status	Caller ID	Caller name	Comment
conference1	4009	Jim W. Crawl	

Conference 1

Add Conference Cancel

4009	4048
Jim W. Crawl	Sue Smart

Extensions for (All groups) BLF updates are available

--Search results-- (0)

-TEST (3)

(All groups) (154)

Arnold (11)

ATM Locations (4)

Bishop (5)

Citrus Heights (2)

Corning (5)

Customer Service (2)

Gridley (7)

iQ Group (4)

Loans - Auto (4)

Loans - Business (5)

Loans - Home (4)

Magalia (3)

Marysville (4)

New Grp (9)

Oroville (7)

Paradise (south) (3)

Parked Calls (20)

Queues (6)

Red Bluff (2)

Redding (15)

Speed Dial (1)

TRUNKS (4)

Woodbury Office (4)

Yuba City (4)

100	101	102	103	1006	1101	1102
1103	1104	1202	1203	1301	1302	1315
1316	1402	1403	1501	1502	1503	1504
1505	1509	1510	1550	1554	1555	2101
2102	2103	2104	2141	2201	2202	2401
2402	2502	3401	3402	3403	3404	3406
3406	3407	3408	3409	3410	3412	3413
3414	3449	3450	3451	3452	3453	3454
3455	3456	3457	3458	3459	3460	3461
3462	3463	3464	3465	3466	3467	3468
3469	3470	3471	3472	3473	3474	3475
3476	3477	3478	3479	3480	3481	3482
3483	3484	3485	3486	3487	3488	3489
3490	3491	3492	3493	3494	3495	3496
3497	3498	3560	3561	3562	3563	3564
3565	3566	3567	3568	3569	4002	4009
4011	4018	4024	4030	4036	4044	4045
4046	4047	4048	5990	5991	5992	5993
5994	5995	5996	5997	5998	5999	7001
7002	7003	7004	7800	8012	8015	91(530) 532-8803
91(530) 872-2695	91(530) 896-0408	91(707) 274-0316	( 9) 245-4332	( 9) 419-2988	91(209) 795-4414	91(925) 345-1234

Search by name: 91(5... BA BA BA BA BA BA

Icon View List View Show Name Show Note Show Note Show Dept

# Overview – Desktop



Caption Bar

Menu Bar

VP Tool Bars

Call List

Conf Window

BLF Group List

BLF Cells

Search Tool

The screenshot shows the VistaPoint Desktop Companion interface. The window title is "Sue Anderson @ 4009 - VistaPoint Desktop Companion". The menu bar includes File, Edit, View, Calls, Extensions, Settings, and Help. The toolbars contain various call control icons like Answer, Hold, Transfer, Hang up, Call pickup, Send to voicemail, Create conference, Park, and Unpark. The call list shows a call from "conference1" with caller ID "4009" and caller name "Jim W. Crawl". The conference window shows participants "Jim W. Crawl" and "Sue Smart". The BLF group list on the left includes groups like "Arnold (1)", "ATM Locations (4)", "Bishop (5)", etc. The BLF grid displays a grid of extension numbers with status icons. A search tool is located at the bottom left of the BLF grid.



# Toolbars

## The Call Control Tool Bar (Main Tool Bar)



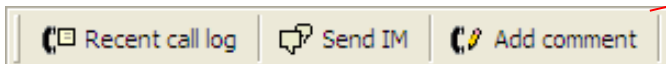
Call processing buttons

## The Calling Tool Bar



Enter number to dial

## The User Tool Bar

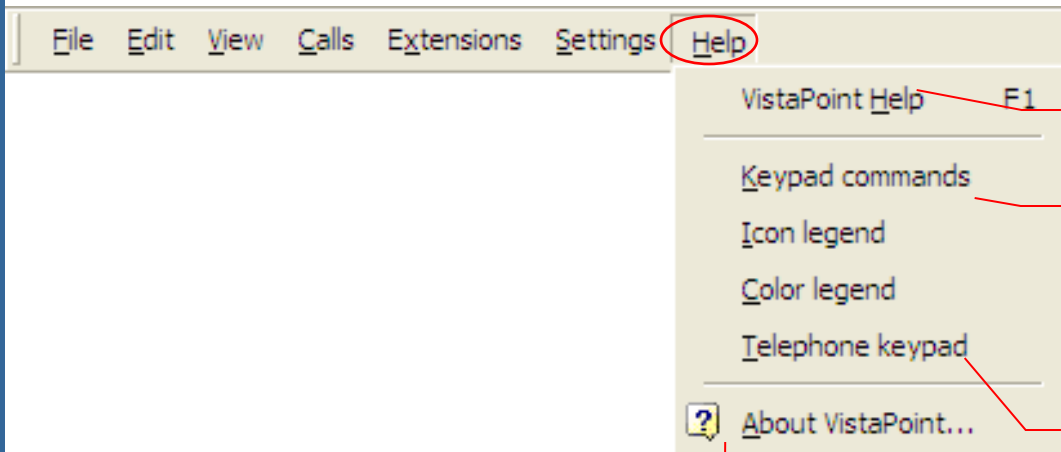


Provides access to your Call Log, sending instant messages, or to add a comment to a call





# Menu Bar - Help



Displays the help file

These options display various legends

Displays telephone keypad

Displays version information

- The Help option provides user with access to help and references for using the applications's features

# User Guide and Legends



### Icon Legend

**Status Icons**

Blank: Extension inactive. No icon present. This means the monitored.

[Icon]: Extension is Idle.

[Icon]: Extension In use.

[Icon]: Extension Ringing.

[Icon]: Extension is On Hold.

[Icon]: This extension has Messages.

[Icon]: User is Online in the currently Call List.

[Icon]: User is Away in the selected call in the

[Icon]: User is Busy in the call from the park Call Box.

[Icon]: Indicates Status is present.

[Icon]: New voice message voicemail is waiting to voicemail for the Call Box (F8).

[Icon]: Incoming call alerting paging number to (F1).

[Icon]: Outgoing call alerting in a comment

[Icon]: Extension is in Consultation Messaging dialog

[Icon]: Extension is in Do Not Disturb mode. (ent incoming and F+L).

[Icon]: Extension is Inactive. (nsions panel).

[Icon]: Extension is forwarding calls. (nsions panel).

[Icon]: Extension is forwarding calls. (y text (all or part of a x (<ENTER> when box)).

[Icon]: Extension is forwarding calls. (w My Extension calls.

[Icon]: Extension is forwarding calls. (Show My Extension

**Status Icons (continued)**

**Command buttons (continued)**

### Color Legend

Normal	Selected	Description
[Icon] 1002 Ted Barns	[Icon] 1002 Ted Barns	Extension is Idle.
[Icon] 1004 Robin Wayne	[Icon] 1004 Robin Wayne	Extension is In Use.
[Icon] 1005 Luke Madison	[Icon] 1005 Luke Madison	Extension is Ringing.
[Icon] 1006 Ludwig Chapman	[Icon] 1006 Ludwig Chapman	Extension is On Hold.
[Icon] 1007 Jim Gandy	[Icon] 1007 Jim Gandy	Extension in Consultation mode.
[Icon] 6001 Terry Novak	[Icon] 6001 Terry Novak	Extension in Do Not Disturb mode.
[Icon] 4036 Henry Hill	[Icon] 4036 Henry Hill	Extension is Inactive.
[Icon] 7103 Molly Martin	[Icon] 7103 Molly Martin	Extension is forwarding calls.

Double click on cell to change color.



# The Call List

# The Call List



Ray Ryan @ 1001 - 3COM Desktop Companion

File Edit View Calls Extensions Settings Help

Answer Hold Transfer Send call Serial Transfer Hang up Call pickup Send to voicemail Create conference

Number to call [ ] Call [ ] Update BLFs [ ] Recent call log [ ] Send IM [ ] Add comment [ ]

**Call List for 1001**

Status	Caller ID	Caller name	Comment
Call List			

**Extensions for A.D.I.** BLF updates are available

--Search results-- (0) (All groups) (135) A.D.I. (8) Adults (6) AmeriCorps (7) Andrews Angels (4) Anger Management (7) Athens Office (6) Autism Outreach (16) Children (8) Clinics (4) Counseling (7) Doctors (10) Early Childhood Intervention (4)	1001 Ray Ryan Engineering 5/22/2009 8:43 AM In training until 10:45 AM	1002 Thomas McLecks Support 5/22/2009 8:57 AM Out until monday	1003 Brian Buttner QA Engineering 5/22/2009 9:38 AM helping ray :-)	1004 Sarah Ashly Engineering 5/22/2009 Working from home today
	1005 Monica Sanchez Support 5/22/2009 8:06 AM In the office until 3:30	91(903) 675-3950 Athens Location 1450 Flat Creek Road Athens , TX 75751	91(903) 595-0404 Tyler Location 1411 South Bennett Tyler , TX 75701	ab Andrews Diversified Industries Tyler A.D.I. Location Andrews Diversified Industr...

Search: [ ] Go [ ]

In selected group

List View Icon View Show Name Show Dept Show Note



## The Call List - Idle

The Call List displays all calls that are active on your extension

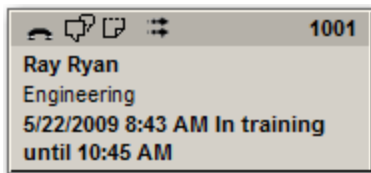
Status	Caller ID	Caller name	Comment
--------	-----------	-------------	---------

Idle Call List – No calls pending



## The Call List – Extension Forwarding

Your Call List caption bar will show when your extension has been forwarded or is in Do Not Disturb (DND)

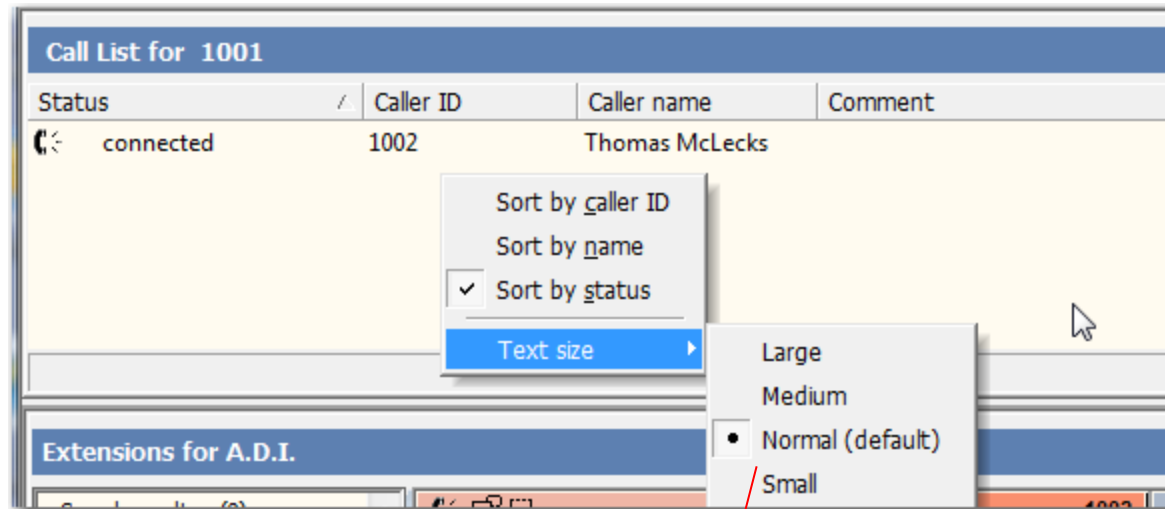


← Your cell as seen by others



## The Call List – Adjusting the Font Size

You can modify the text size by right-clicking inside the Call List.




Right-click inside Call List to display menu



## The Call List – Adjusting the Font Size

The text size selected will now be used to display all call activity

Call List for 1001				
Status	/	Caller ID	Caller name	Comment
 connected		1002	Thomas McLecks	

Large text has been selected



# Hiding the Call List



The screenshot shows the 3COM Desktop Companion interface. At the top, there's a menu bar (File, Edit, View, Calls, Extensions, Settings, Help) and a toolbar with call-related actions. Below that is a 'Number to call' field set to '1002' and a 'Call' button. The main area is titled 'Call List for 1001' and contains a table with columns: Status, Caller ID, Caller name, and Comment. A red circle highlights a minus sign icon in the top right corner of this section. A red arrow points from the text 'Click here \"/&gt;

Click here "-" to hide call list

# Call List Hidden



Click “+” to re-display call list

Ray Ryan @ 1001 - 3COM Desktop Companion

File Edit View Calls Extensions Settings Help

Answer Hold Transfer Send call Serial Transfer Hang up Call pickup Send to voicemail Park

Number to call 1002 Call Update BLFs Recent call log Send IM Add comment

Call List for 1001

Extensions for A.D.I. BLF updates are available

--Search results-- (0) (All groups) (135) A.D.I. (8) Adults (6) AmeriCorps (7) Andrews Angels (4) Anger Management (7) Athens Office (6) Autism Outreach (16) Children (8) Clinics (4) Counseling (7) Doctors (10) Early Childhood Intervention (4) Emergency (1) Jail Diversion (9) Medical Management (6) Mental Health (10) Mental Retardation (53) Mobile Phones (1) OEF/OIF (7) Substance Abuse (6) Transportation (8) Veterans (4) Vocational Training (8) zQueues (5)	1001 Ray Ryan Engineering 5/22/2009 8:43 AM In training until 10:45 AM	1002 Thomas McLecks Support 5/22/2009 8:57 AM Out until monday	1003 Brian Buttner QA Engineering 5/22/2009 9:38 AM helping ray :-)
	1004 Sarah Ashly Engineering 5/22/2009 Working from home today	1005 Monica Sanchez Support 5/22/2009 8:06 AM In the office until 3:30	91(903) 675-3950 Athens Location 1450 Flat Creek Road Athens , TX 75751
	91(903) 595-0404 Tyler Location 1411 South Bennett Tyler , TX 75701	ab Andrews Diversified Industries Tyler A.D.I. Location Andrews Diversified Industr...	

Search:  Go

In selected group

List View Icon View Show Name Show Dept Show Note

# Moving Windows within Application



Ray Ryan @ 1001 - 3COM Desktop Companion

File Edit View Calls Extensions Settings Help

Ray Ryan @ 1001 - 3COM Desktop Companion

File Edit View Calls Extensions Settings Help

Answer Hold Transfer Send call Serial Transfer Hang up Call pickup Send to voicemail Create conference

Number to call [ ] Call Update BLFs Recent call log Send IM Add comment

**Extensions for A.D.I.** BLF updates are available

--Search results-- (0) (All groups) (135) A.D.I. (8) Adults (6) AmeriCorps (7) Andrews Angels (4) Anger Management (7) Athens Office (6) Autism Outreach (16) Children (8) Clinics (4) Counseling (7)	<table border="1"> <tr> <td style="text-align: right;">1001</td> <td style="text-align: right;">1002</td> <td style="text-align: right;">1003</td> <td style="text-align: right;">1004</td> </tr> <tr> <td>Ray Ryan Engineering 5/22/2009 8:43 AM In training until 10:45 AM</td> <td>Thomas McLecks Support 5/22/2009 8:57 AM Out until monday</td> <td>Brian Buttner QA Engineering 5/22/2009 9:38 AM helping ray ;-)</td> <td>Sarah Ashly Engineering 5/22/2009 Working from home today</td> </tr> <tr> <td style="text-align: right;">1005</td> <td style="text-align: right;">91(903) 675-3950</td> <td style="text-align: right;">91(903) 595-0404</td> <td style="text-align: right;">ab</td> </tr> <tr> <td>Monica Sanchez Support 5/22/2009 8:06 AM In the office until 3:30</td> <td>Athens Location  1450 Flat Creek Road Athens , TX 75751</td> <td>Tyler Location  1411 South Bennett Tyler , TX 75701</td> <td>Andrews Diversified Industries  Tyler A.D.I. Location Andrews Diversified Industr...</td> </tr> </table>	1001	1002	1003	1004	Ray Ryan Engineering 5/22/2009 8:43 AM In training until 10:45 AM	Thomas McLecks Support 5/22/2009 8:57 AM Out until monday	Brian Buttner QA Engineering 5/22/2009 9:38 AM helping ray ;-)	Sarah Ashly Engineering 5/22/2009 Working from home today	1005	91(903) 675-3950	91(903) 595-0404	ab	Monica Sanchez Support 5/22/2009 8:06 AM In the office until 3:30	Athens Location  1450 Flat Creek Road Athens , TX 75751	Tyler Location  1411 South Bennett Tyler , TX 75701	Andrews Diversified Industries  Tyler A.D.I. Location Andrews Diversified Industr...
1001	1002	1003	1004														
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Monica Sanchez Support 5/22/2009 8:06 AM In the office until 3:30	Athens Location  1450 Flat Creek Road Athens , TX 75751	Tyler Location  1411 South Bennett Tyler , TX 75701	Andrews Diversified Industries  Tyler A.D.I. Location Andrews Diversified Industr...														

Search: [ ] [Go]

In selected group

**Call List for 1001**

Status	Caller ID	Caller name	Comment

List View Icon View Show Name Show Dept Show Note



# Busy Lamp Field (BLF) BLF Cells & Groups



# BLF Groups and Cells

- BLF Cells represent people and their extensions. These “Cells” are sorted into BLF Groups by your System Administrator

Extensions for A.D.I. BLF updates are available

1001 Ray Ryan Engineering 5/22/2009 8:43 AM In training until 10:45 AM	1002 Thomas McLecks Support 5/22/2009 8:57 AM Out until monday	1003 Brian Buttner QA Engineering 5/22/2009 9:38 AM helping ray :-)
1004 Sarah Ashly Engineering 5/22/2009 Working from home today	1005 Monica Sanchez Support 5/22/2009 8:06 AM In the office until 3:30	91(903) 675-3950 Athens Location 1450 Flat Creek Road Athens , TX 75751
91(903) 595-0404 Tyler Location 1411 South Bennett Tyler , TX 75701	ab Andrews Diversified Industries Tyler A.D.I. Location Andrews Diversified Industr...	

Search:    In selected group

List View Icon View Show Name Show Dept Show Note

**BLF groups**

**Search tool**

**Cells are displayed here**

- New extension
- Update BLFs**
- Arrange Extensions
- View



# BLF Groups and Cells

- BLF groups are independent of other groups. Within each BLF Group, Cells can be sized as needed

Extensions for A.D.I. BLF updates are available

1001 Ray Ryan Engineering 5/22/2009 8:43 AM In training until 10:45 AM	1002 Thomas McLecks Support 5/22/2009 8:57 AM Out until monday	1003 Brian Buttner QA Engineering 5/22/2009 9:38 AM helping ray :-)
1004 Sarah Ashly Engineering 5/22/2009 Working from home today	1005 Monica Sanchez Support 5/22/2009 8:06 AM In the office until 3:30	91(903) 675-3950 Athens Location 1450 Flat Creek Road Athens , TX 75751
91(903) 595-0404 Tyler Location 1411 South Bennett Tyler , TX 75701	ab Andrews Diversified Industries Tyler A.D.I. Location Andrews Diversified Industr...	

Search:

In selected group

**Use your mouse to resize cells**



# BLF – List View

- Click the List View button to change from “Cell” view to “List” view

Extensions for A.D.I. BLF updates are available -

--Search results-- (0)  
(All groups) (135)  
A.D.I. (8)  
Adults (6)  
AmeriCorps (7)  
Andrews Angels (4)  
Anger Management (7)  
Athens Office (6)  
Autism Outreach (16)  
Children (8)  
Clinics (4)  
Counseling (7)  
Doctors (10)  
Early Childhood Intervention (4)

Search:

In selected group

	First name	Last name	Department	Extension	F.	Status note
	Ray	Ryan	Engineering	1001		
	Thomas	McLecks	Support	1002		
	Brian	Buttner	QA Enginee...	1003		
	Sarah	Ashly	Engineering	1004		
	Monica	Sanchez	Support	1005		
		Athens Loc...		919036753...		
		Tyler Location		919035950...		
		Andrews Di... Industries		ab		

List View  Icon View

List View of devices

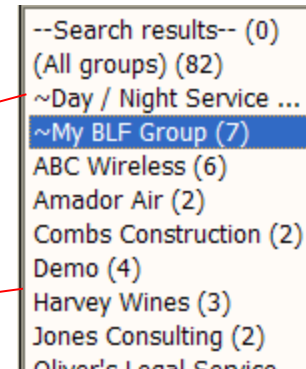


# BLF Group Types

- There are two types of BLF Groups
  - Global BLF Groups – Created by Administrator
  - Personal BLF Groups – Created by You!

Personal BLF Group

Global BLF Group





# DSS / BLF Cells



- BLF Cells provide “real-time” information about the person’s communication device(s).

1203 Michael Dube Lean Agent Fwd: All 916032229146 Working from home office today	1315 Sue Harris Reception Out to Lunch
4044 Sales Queue Inside Sales	4048 John Miller Fwd: Voicemail In the office until 3:00 PM
4049 Ray Ryan Executive ▶ 4018 In Meetings all day	91(925) 345-1234 Jim Combs Cell Phone
BA Company Information Click to view Web Site: <a href="http://www.eeco-net.com...">http://www.eeco-net.com...</a>	

Mike’s extension has been forwarded

Drag and Drop calls into agent queues

This phone is ringing arrow indicates inbound Call from 4018

Cells can also contain Information

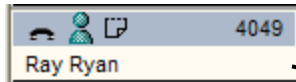
Sue is on a call

Dragging and dropping a caller onto this cell will transfer the caller to Jim’s cell phone.

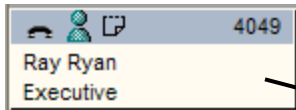
# Sizing of Cells – Maximizing Views



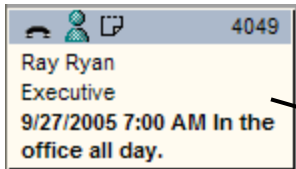
Minimized to display just the extension number and phone, IM and Status Note icons



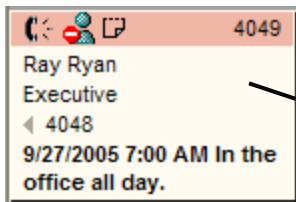
Now with name displayed



Name and department displayed



Name, department and Status Note



Name, department and Status Note and connected call

# Displaying Contents of BLF Cells



Extensions for A.D.I. BLF updates are available

1001	1002	1003	1004
Ray Ryan	Thomas McLecks	Brian Buttner	Sarah Ashly
1005	91(903) 675-3950	91(903) 595-0404	ab
Monica Sanchez	Athens Location	Tyler Location	Andrews Diversified Industries

Search:

In selected group

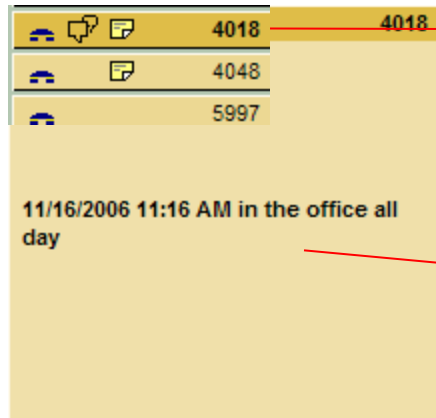
List View Icon View **Show Name Show Dept Show Note**

Use the toolbar to select what information you want displayed in this group of cells



## Displaying Content of Minimized Cells

- Clicking on a Cell will maximize to display the contents of that cell...



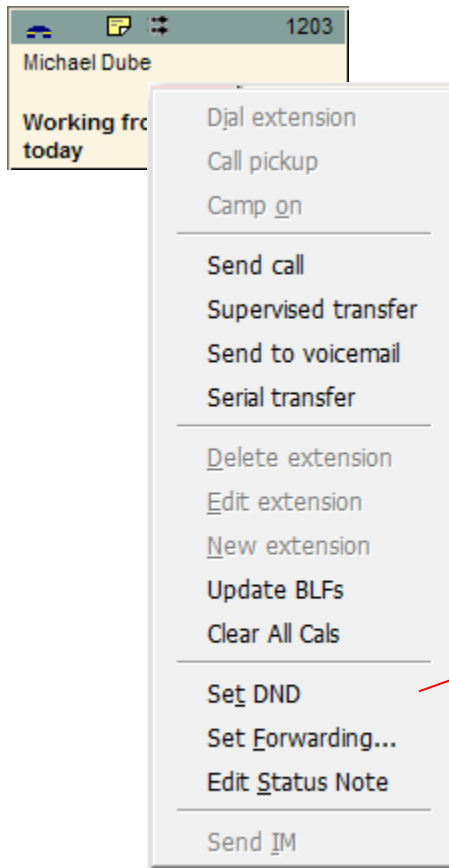
The icons indicate that this person has inserted a Status Note. To view the Note, click on a cell to expand.

The entire contents of the Cell are not displayed



# Modifying Your Extension's Settings

- You can modify your extension's
  - Do Not Disturb (DND)
  - Call Forwarding Options
  - Status Note



Right-mouse click on your extension's cell

Select these option to modify this extension's parameters



## Modifying Your Extension's Forwarding

- When you select “Set Forwarding” from pop-up menu, the following dialog appears

Forward Type	Enabled	Destination
Forward All	No	
Forward No Answer	No	
Forward Busy	No	
Forward All to Voicemail	No	

Enable:  Destination:  Set

Disable All Done

Based on your phone system, you will have several options to choose from.

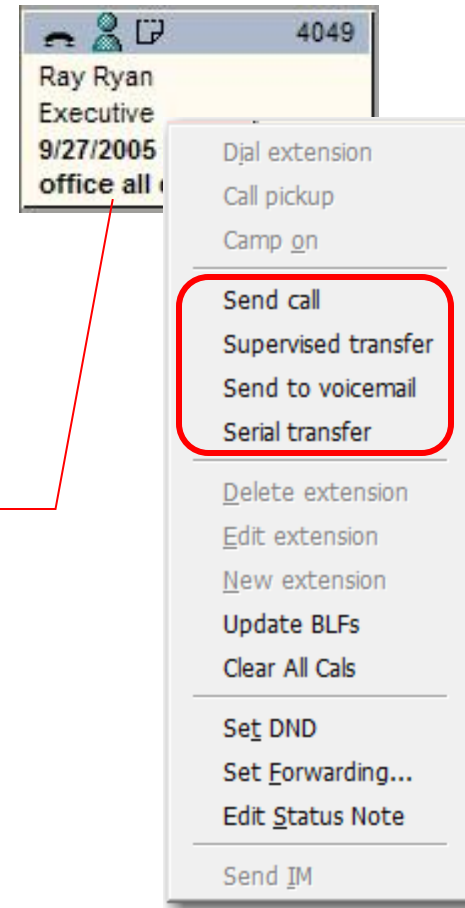
Currently, no forwarding options have been configured for this extensions



# Built-In Call Control

- Cells also provide a fast and easy way to transfer callers and these features will be discussed later in this module.

Right-click on cell to view options





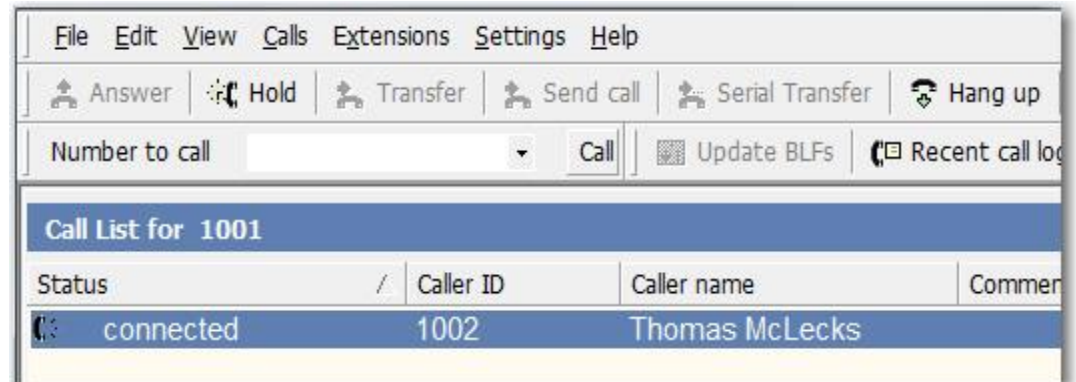
# Desktop Companion Training Processing Calls





# Answering a Call

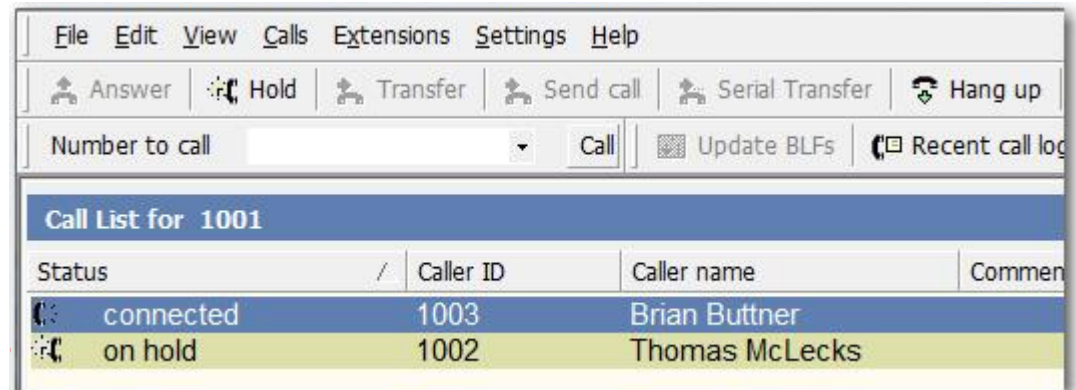
- When a call rings your extension, it appears in the Call List as “offering”
- You can..
  - Double-click on the call...
  - Pick up the telephone handset or...
  - Click the Answer button.





# Processing Multiple Calls

- You are connected to a call and another call is offered
- You can..
  - Ignore or...
  - Ask the caller to hold and double-click on the call being offered
    - The caller is automatically placed on hold and you are connected to the selected caller





# Holding and UnHolding a Call

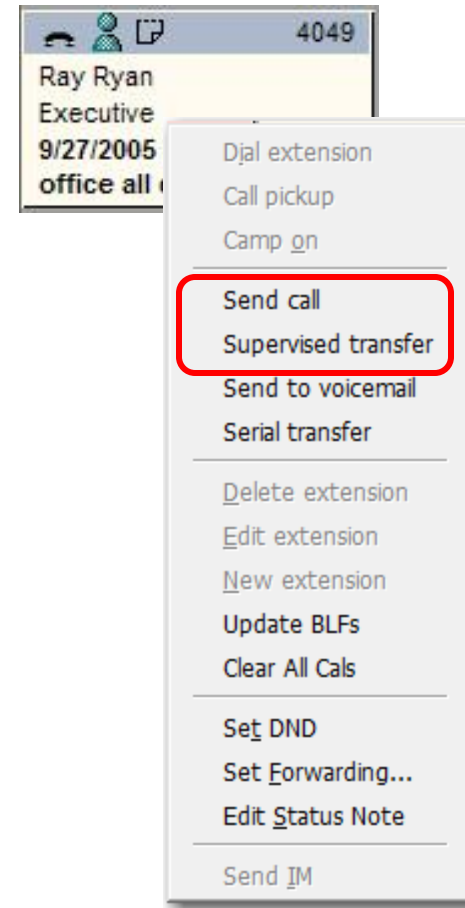
- While connected to a call...
  - Click the Hold button, or press F9.
- To retrieve the call from hold,
  - Select the call and press F10 or click the Unhold button.





# Transfer Calls Using the Cell's Menu

- Right-click on the BLF Cell of the requested party.
- Select the transfer option from the menu.





# Transferring a Call using the Keyboard

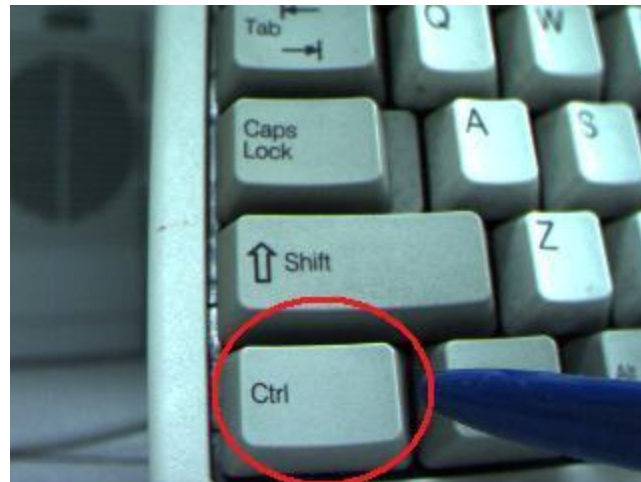
- While connected to a call use the numeric keypad to enter the requested party's number
- Press F7 or click the "Cancel Transfer" button to cancel the transfer and reconnect to the caller
- Click the transfer button or click F6 to initiate the transfer.

Status	Caller ID	Caller name	Comment
on hold pending trans...	1002	Thomas McLecks	
ringback	1003	Brian Buttner	

# Transferring a Call using Drag and Drop



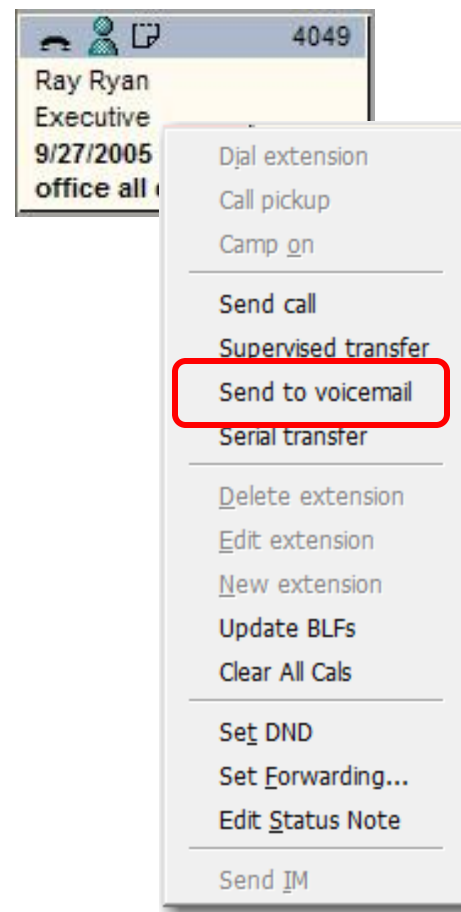
- See movie



# Transferring a Caller to a Person's Mailbox



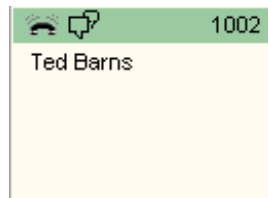
- Right-click on the BLF Cell of the requested party.
- Click the “Send to voicemail” option.
- The caller will be instantly transferred to their mailbox.



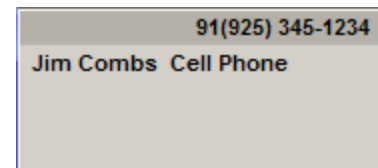
# Placing Calls Using Cells



Double-click on a Cell.

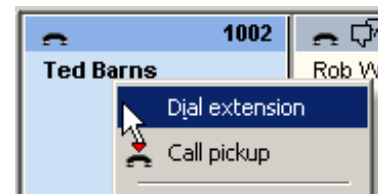


or



or

Right-click and choose “Dial Extension.”



or

Enter a number in the Call Box and then click the Call button

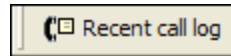






# Making a Call – Using the Call Log

- Click the Recent Call Log button.



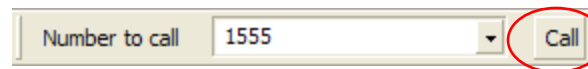
- The Recent Call Log window appears.

- Select a call in the list

Time	Origin	Far-end number	Far-end name	Duration
8/3/2005 12:34:53 PM	inbound	4049	Ray Ryan	00:44
8/3/2005 12:10:32 PM	inbound			16:08
8/3/2005 11:56:24 AM	inbound			14:15
8/3/2005 11:42:04 AM	outbound	1554	ABC Wireless	00:31
8/3/2005 11:41:01 AM	inbound	4049	Ray Ryan	01:34
8/3/2005 11:36:25 AM	inbound			03:45
8/3/2005 11:32:30 AM	inbound	4049	Ray Ryan	03:34
8/3/2005 10:44:21 AM	inbound			03:22
8/3/2005 10:33:42 AM	outbound	1555	Brian Buttner	00:19
8/3/2005 10:31:03 AM	outbound	91(508) 397-5780		01:30
8/3/2005 9:05:06 AM	outbound			00:05
8/3/2005 9:03:26 AM	outbound	91(800) 705-5033		01:39
8/3/2005 9:01:19 AM	outbound	1555	Brian Buttner	00:18

- The automatically number is inserted into the Call field

- Click the Call button...the call is initiated.





# Making a Call – Using the Call Log

- While in the Recent Call Log...
  - right-mouse click on the call to display the pop-up menu.
- Select “Dial”
- The automatically number is inserted into the Call field
  - Click the Call button...the call is initiated.

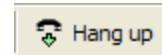
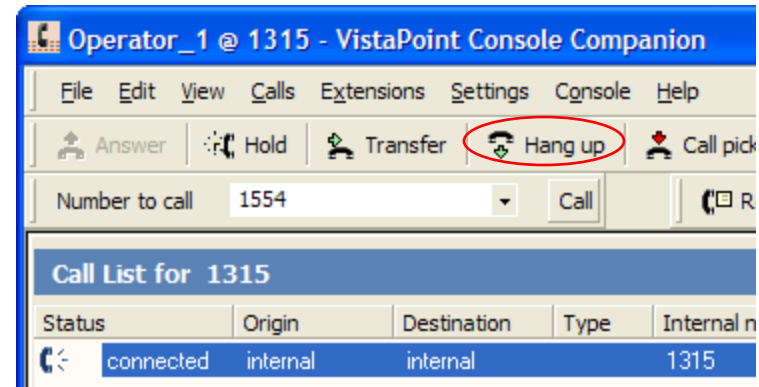
Time	Origin	Far-end number	Far-end name	Duration
8/3/2005 12:34:53 PM	inbound	4049	Ray Ryan	00:44
8/3/2005 12:10:32 PM	inbound			16:08
8/3/2005 11:56:24 AM	inbound			14:15
8/3/2005 11:42:04 AM	outbound	1554	ABC Wireless	00:31
8/3/2005 11:41:01 AM	inbound	4049	Ray Ryan	01:34
8/3/2005 11:36:25 AM	inbound			03:45
8/3/2005 11:32:30 AM	inbound	4049	Ray Ryan	03:34
8/3/2005 10:44:21 AM	inbound			03:22
8/3/2005 10:33:42 AM	outbound	1555	Brian Buttner	00:19
8/3/2005 10:31:03 AM	outbound	91(508)		01:20
8/3/2005 9:05:06 AM	outbound			5
8/3/2005 9:03:26 AM	outbound	91(800)		9
8/3/2005 9:01:19 AM	outbound	1555		8

Number to call: 1555 Call



# Disconnecting a Call

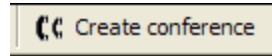
- Select a call in the Call List.
  - If the call is on hold, take the call off hold.
- Click the Hang Up button, or press F2.





# Conference Call - Setup

- Assuming you are already connected to a call,
  - Click the Create Conference button on the main toolbar.



The screenshot displays two windows side-by-side. The left window, titled 'Call List for 1315', has a 'Filtered' dropdown and a table with columns: Status, Origin, Destination, Type, Internal number, and Caller ID. The table contains one row: 'conferenced' (Status), 'internal' (Origin), 'internal' (Destination), 'confe...' (Type), '1315' (Internal number), and '4049' (Caller ID). The right window, titled 'Conference 1', has buttons for 'Add', 'Conference', and 'Cancel'. Below these buttons, two participant cards are shown: 'Operator 1' with internal number '1315' and 'Ray Ryan' with internal number '4049'. A red line originates from the text 'Parties in the conference' and points to the participant cards in the conference window.

Conference box displays  
Parties in the conference



# Conference Call – Adding Parties

- Add additional people by...
  - Dragging and dropping a person's Cell into the Conference Box, or enter the number in the Call Box and click call.

The screenshot displays two panels from a software interface. The left panel, titled 'Call List for 1315', shows a table of call records. The right panel, titled 'Conference 1', shows a control interface for a conference call with three participants: Operator 1, ABC Wireless, and Ray Ryan. The 'Conference' button in the top bar of the right panel is circled in red.

Status	Origin	Destination	Type	Internal number	Caller ID
conference1					
ringback	internal	internal	confe...	1315	1554
on hold co...	internal	internal	confe...	1315	4049

Conference 1

Add Conference Cancel

Operator 1	ABC Wireless	Ray Ryan
------------	--------------	----------

- Other callers in conference are placed on hold while you contact the other party. Once you are ready to connect everyone together, click the “Conference” button



# Conference Call – Adding Parties

- Once you click the Conference button all parties will be joined together into the conference as seen here.

The screenshot displays two panels from a software interface. The left panel, titled 'Call List for 1315', shows a table of call records. The right panel, titled 'Conference 1', shows a list of participants in a conference call.

Status	Origin	Destination	Type	Internal number	Caller ID
conference1					
conferenced	internal	internal	confe...	1315	1554
conferenced	internal	internal	confe...	1315	4049

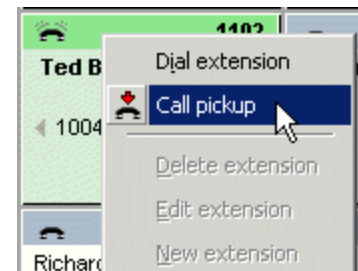
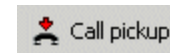
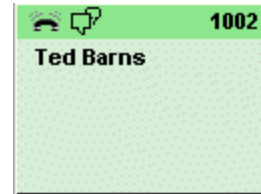
The 'Conference 1' panel shows three participants:

- Operator 1 (Internal number 1315)
- ABC Wireless (Internal number 1554)
- Ray Ryan (Internal number 4049)



## Call Pickup – Pick up a call ringing another extension

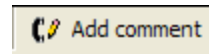
- Click on the Cell of the ringing extension or...
  - Enter the number in the Call Box using your numeric keypad then...
- Click the Call Pickup button, or press Ctrl+F4. You will be connected to the call.
- Another way to pick up a call is to simply right-click on the extension that is ringing and choose Call Pickup.



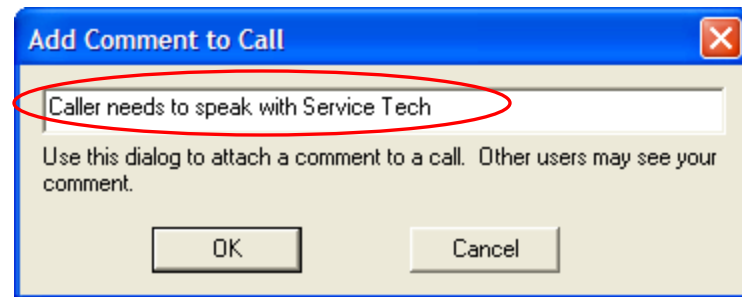


# Attaching a Comment to a Call

- While connected to a call
  - Click the Add Comment button, or press Ctrl+M. The Add Comment to Call dialog will appear



- Type in your comment and click OK



- The comment will appear in the Call List...

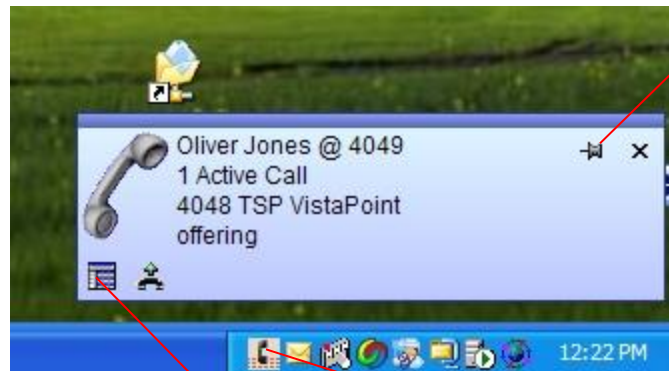
Status	Origin	Destination	Type	Internal number	Caller ID	Caller name	Timer	Comment
offering	external	internal		1315	209 245 5500	Custom Paints	00:02	
offering	external	internal		1315	603 929 0110	Ron's Auto	00:03	
connected	external	internal		1315	415 546 1212	The Law Group	00:45	\\Operator_1 @1315: Caller needs to speak with Service Tech





## Using “Toast” for Call Notification

- If you have minimized your Desktop to the “Tray” and a call rings your extension, popup “toast” window will appear....



Click to “pin” to your desktop

Desktop minimized to tray

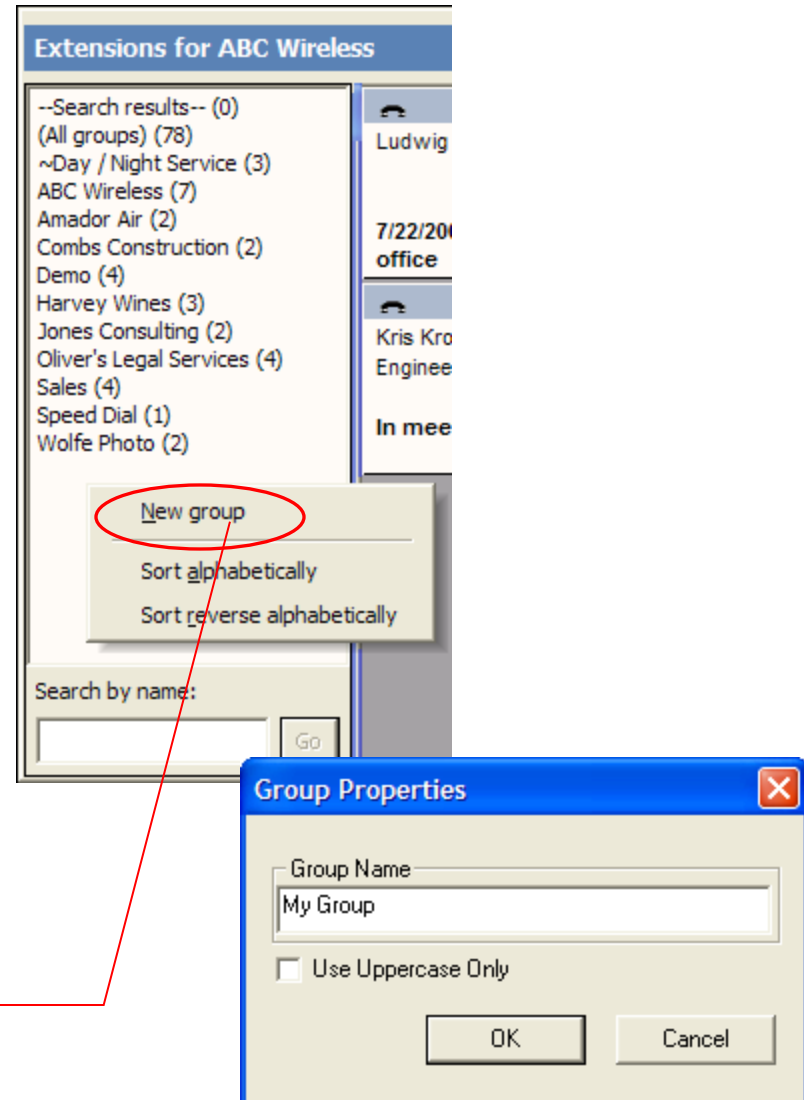
Click to display main Desktop screen



# Creating a Personal BLF Group

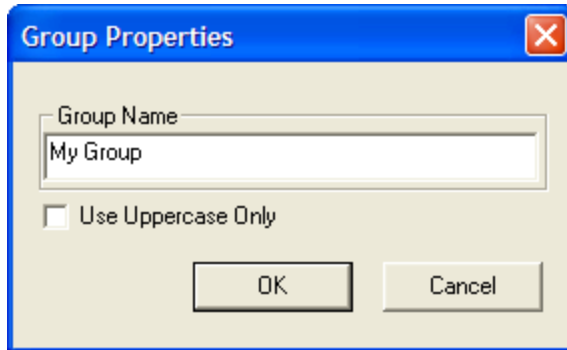
- Right-click in the Extension Groups area
- Choose “New Group” from the menu. The Group Properties dialog box appears.
- Enter a name for the new group, and click OK.
- The new group appears in the Extension Groups area. You can now add personal extensions to the group you created.

Select to add a personal BLF group



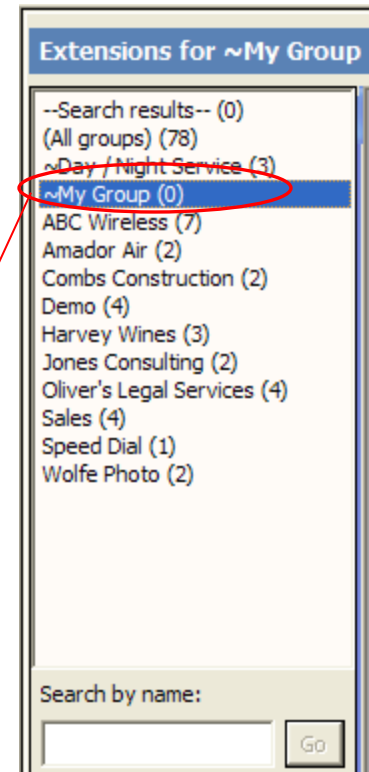


# Creating a Personal BLF Group



- Enter the name for your new BLF Group and click OK

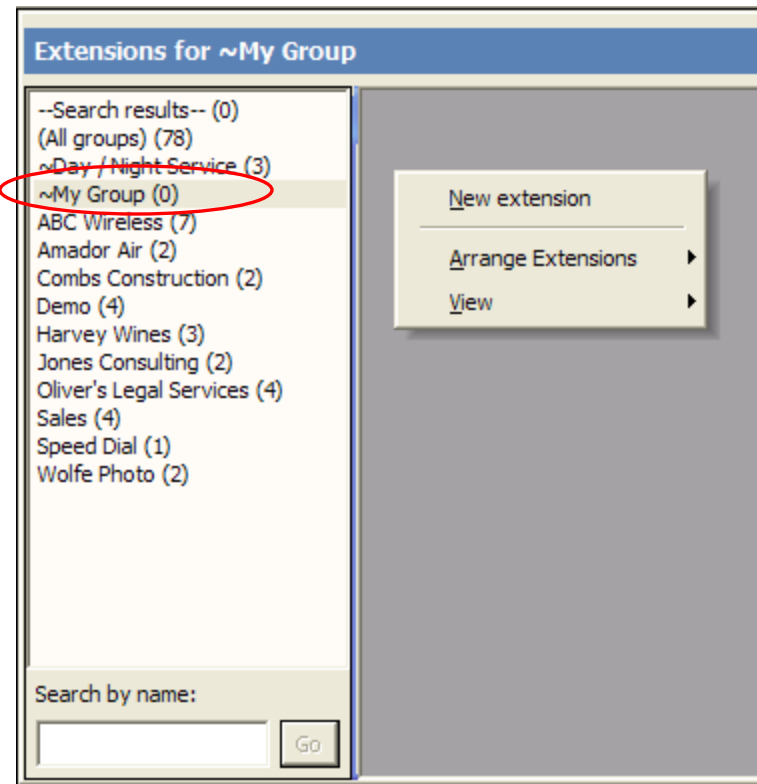
Your BLF Group will appear in the list





# Adding Cells to your BLF Group

- Select the personal BLF group that you created
- Right-click in the gray area to display the pop-up menu. Select New extension.





# Adding Cells to your BLF Group

- Enter information:
  - First Name
  - Last Name
  - Department / Comment
  - Dialable Address
- Click OK.
- The new personal Extension Cell has now been added to your personal Extension Group.

**Add Extension**

ID Number: 2147483652 Local

First Name: Staples

Last name:

Department (or a comment): Office Supplies

Dialable Address: 912096781234

Note...The "Dialable Address" field can contain an extension, telephone, or feature access number.

OK Cancel

This can be any number that you can dial using your telephone. Be sure to add the 9 when accessing an outside line.



# Adding Cells to your BLF Group

- The new Cell has now been added to your personal BLF Group

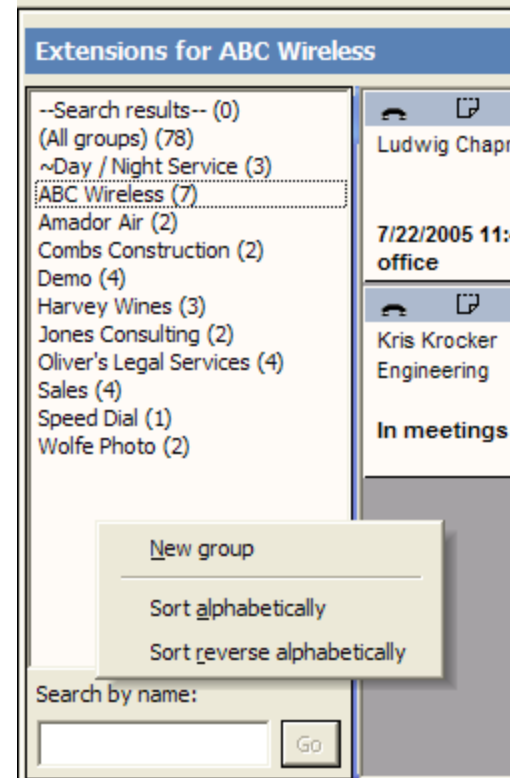
Double-click on cell to call or drag and drop a call onto this cell to transfer call

Extensions for ~My Group	
--Search results-- (0)	91(209) 678-1234
(All groups) (79)	Staples
~Day / Night Service (3)	Office Supplies
~My Group (1)	
ABC Wireless (7)	
Amador Air (2)	
Combs Construction (2)	
Demo (4)	
Harvey Wines (3)	
Jones Consulting (2)	
Oliver's Legal Services (4)	
Sales (4)	
Speed Dial (1)	
Wolfe Photo (2)	



## Sorting BLF Group List

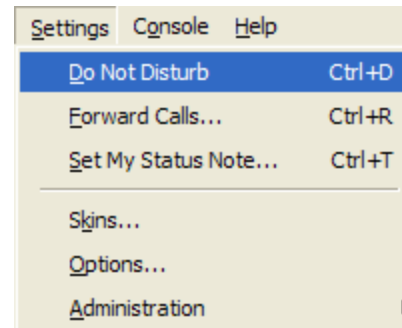
- Right-click anywhere in the BLF Group area.
- Choose “Sort Alphabetically” or “Sort Reverse Alphabetically” from the menu.



# Setting Do Not Disturb – Your Telephone



- From the menu bar, choose Settings then Do Not Disturb
- Your Call List will display that your telephone has been placed into "Do Not Disturb"
- NOTE: All calls are now being forwarded, based on your Forward Busy / No Answer settings.



A screenshot of a call queue window. The title bar reads 'Call Queue for 1006 Do not disturb'. Below the title bar is a table with the following columns: 'Status', 'Origin', 'Destination', 'Type', and 'Caller ID'. The table body is currently empty.

Status	Origin	Destination	Type	Caller ID
--------	--------	-------------	------	-----------



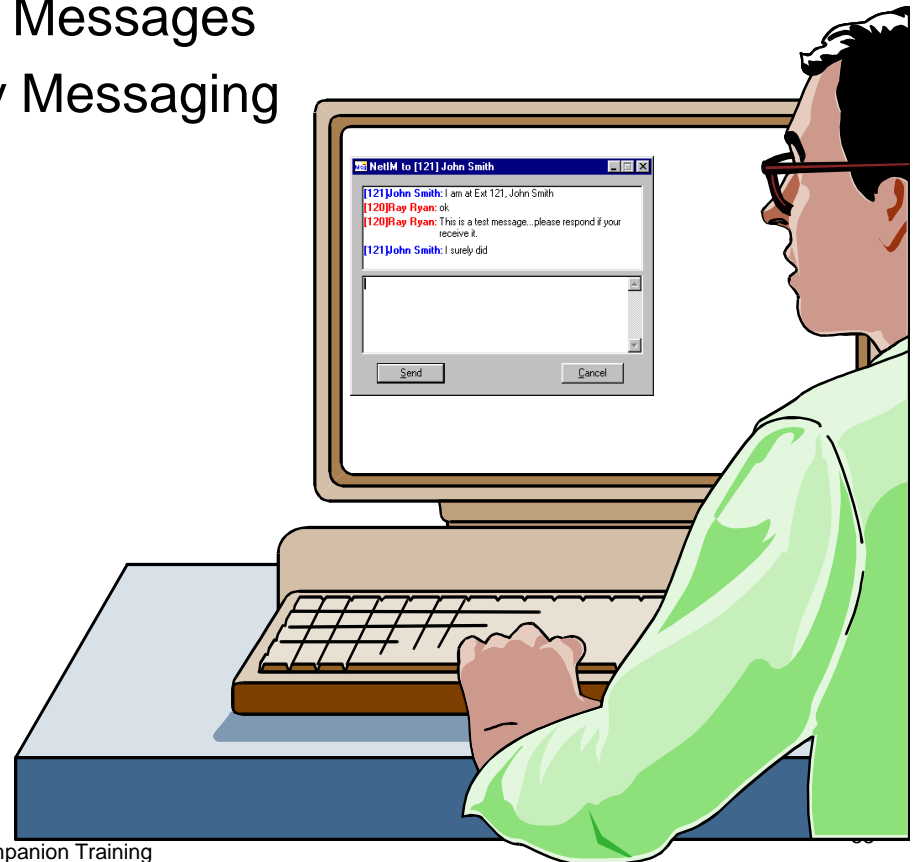
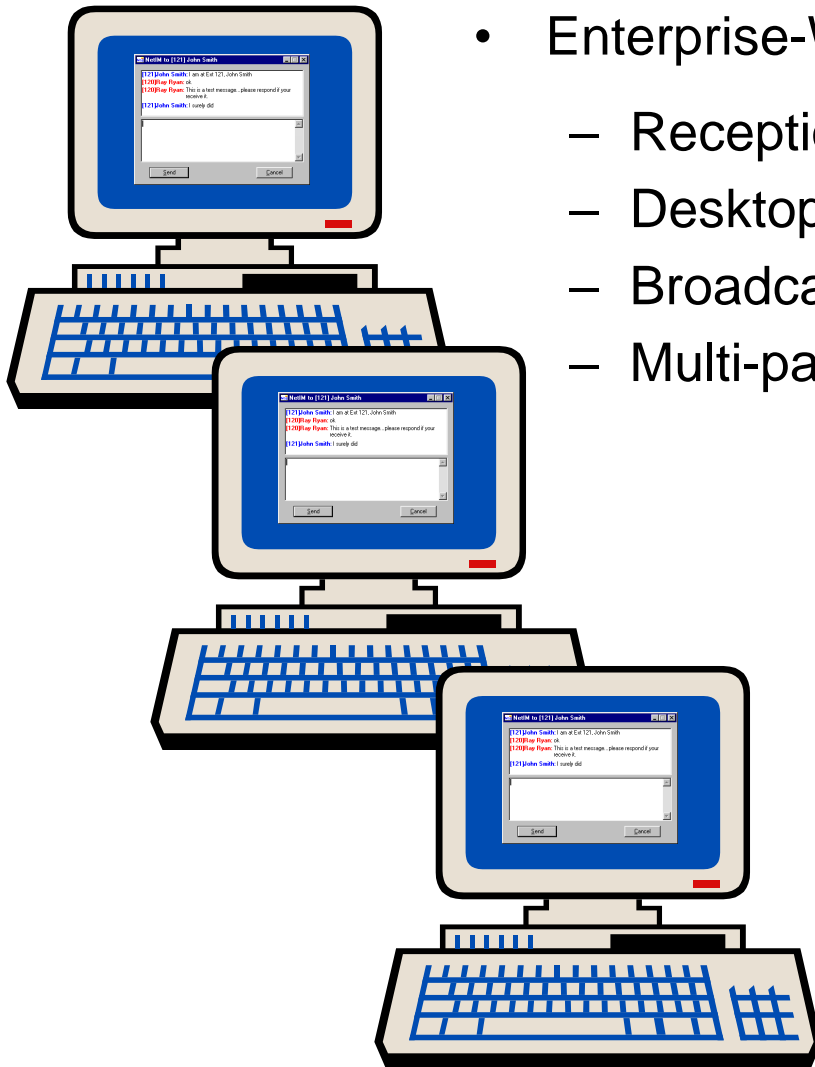


# Desktop Companion Training Instant Messaging and Custom Settings

# VistaPoint Enterprise – Instant Messaging



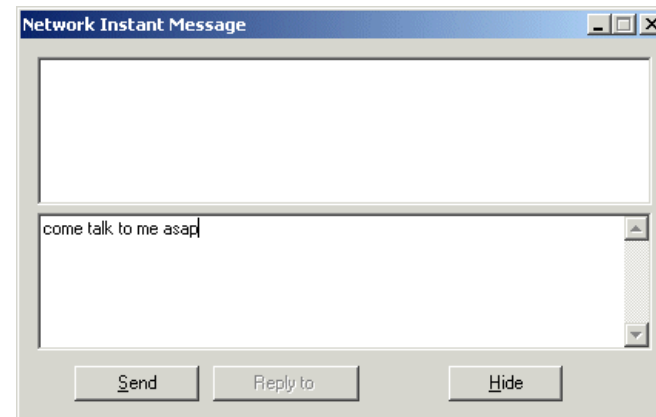
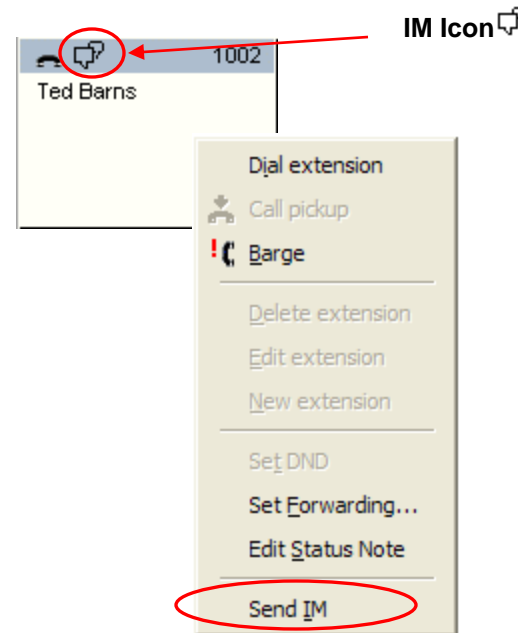
- Enterprise-Wide Network Messaging
  - Receptionist-to-Desktop
  - Desktop-to-Desktop
  - Broadcast Messages
  - Multi-party Messaging



# Sending an IM – Using VistaPoint IM



- Check for "IM" indicator on the recipient's Extension Cell.
  - NOTE: If no IM indicator appears, the person will not receive the IM until they start up VistaPoint. This is called a "Sticky Note.")
- Right-click on the Cell and choose "Send IM."
- Type the message in the lower part of the window.
- Click the Send button.



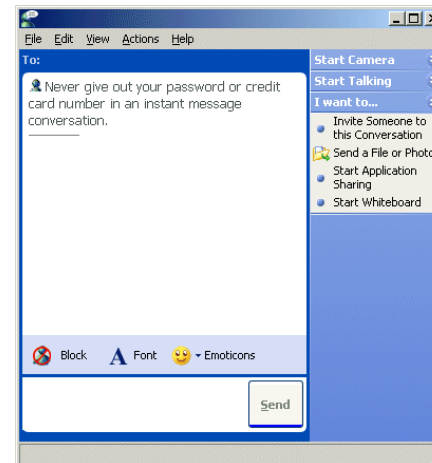
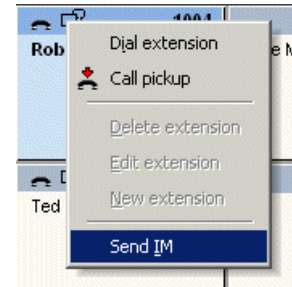


# Sending an IM – Using Windows Messenger

- Check for the Windows Messenger indicator on the recipient's Extension Cell.
- Right-click on the Extension Cell and choose "Send IM."
- Type the message in the lower part of the window.
- Click the Send button.



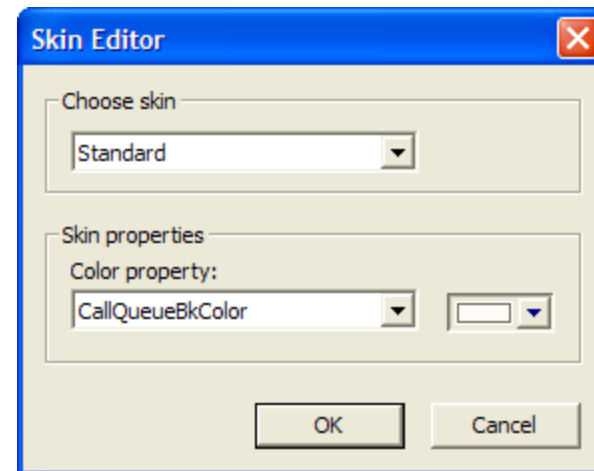
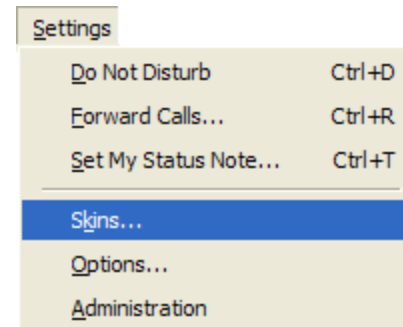
Windows Messenger Icon





# Changing Display Colors (“Skins”)

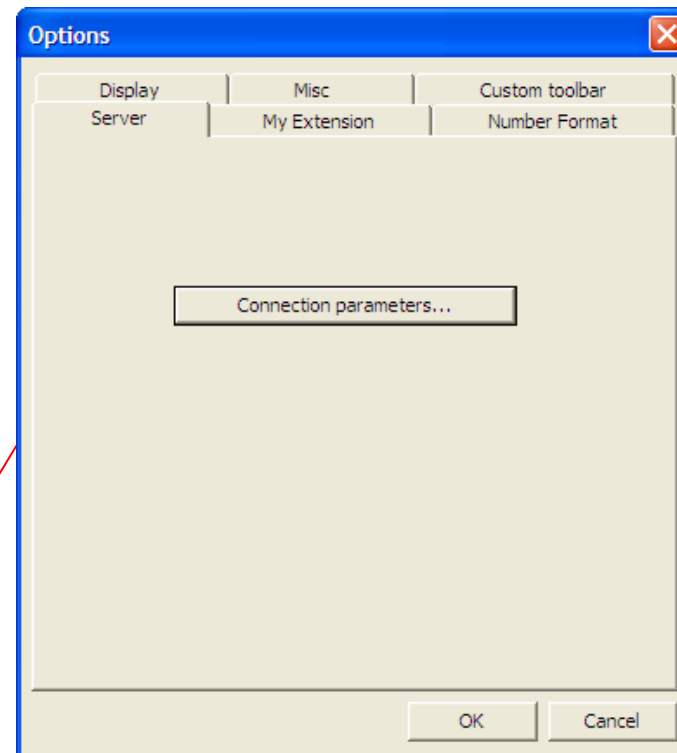
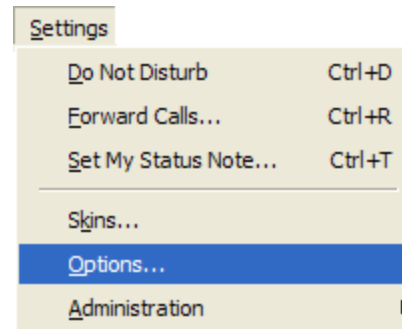
- From the menu bar, choose **Settings > Skins**. The Skin Editor dialog box appears.
- If you want to use a pre-configured skin, choose one from the drop down list.
- If you want to use your own custom colors, select each part of the interface in turn in the Color Property drop down list. Then click the button to the right, to change the color of that property.



# Application-Specific Options




- From the menu bar, select **Settings > Options**. The Options dialog box will appear.
  - *NOTE: If you were not logged in as Administrator, the Connection Parameters button would be grayed out.*

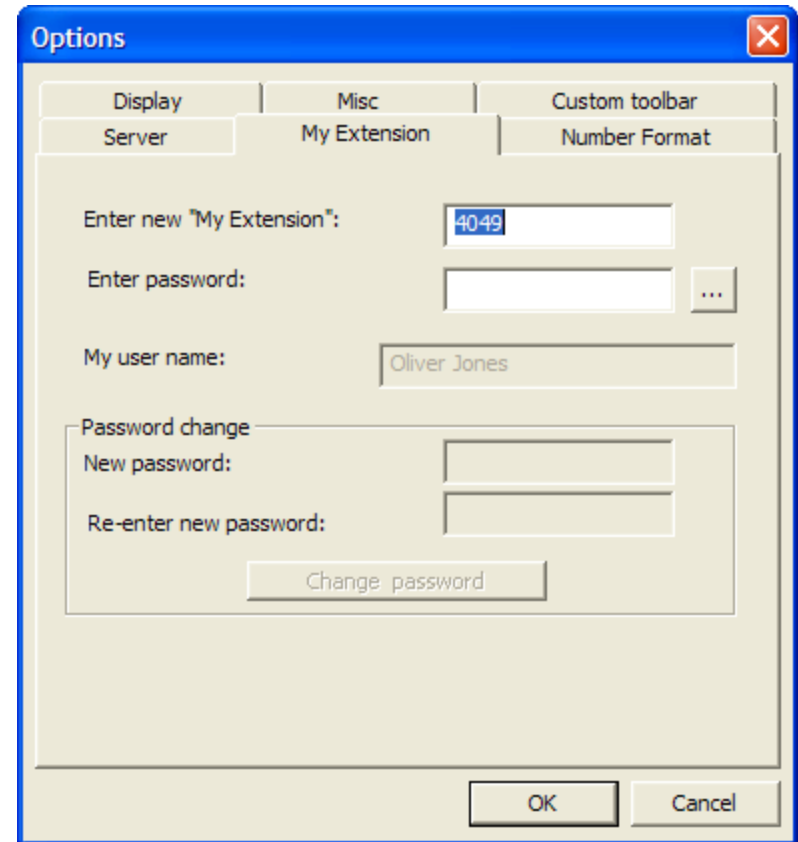


Select any Tab to modify settings

# Setting a Personal Password



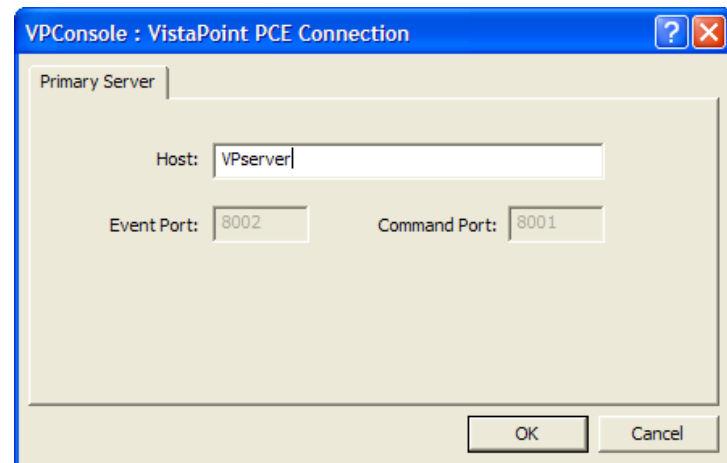
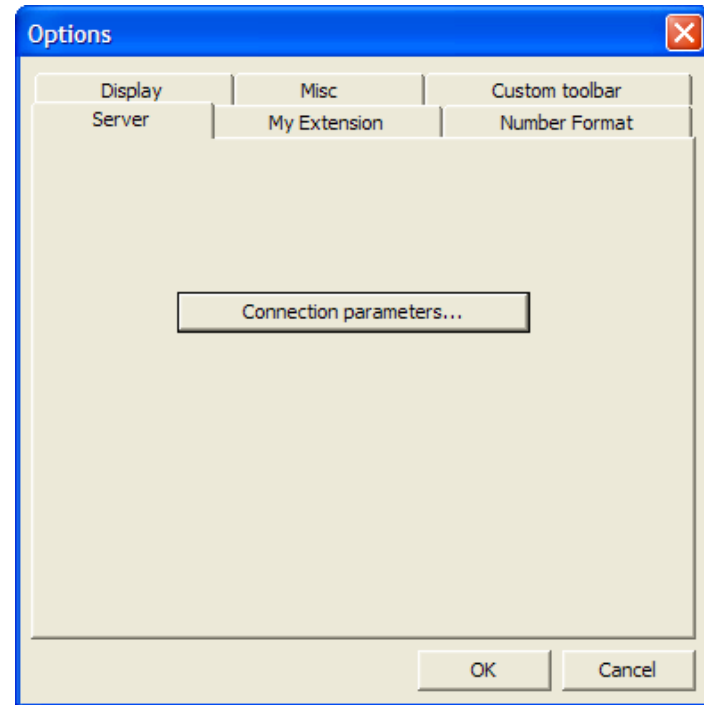
1. From the menu bar, choose **Settings > Options**
2. Select the My Extension tab click on the  button.
3. Enter a password



Note: Each user should set a personal password.

# Setting Server Options

- Click the Connection Parameters button.
- The VistaTDS Connection Setup dialog appears.
- In the **Host** field, enter the name or IP address of the VistaPoint server. Ask your system administrator for this information.
- Click the OK button to save the settings.



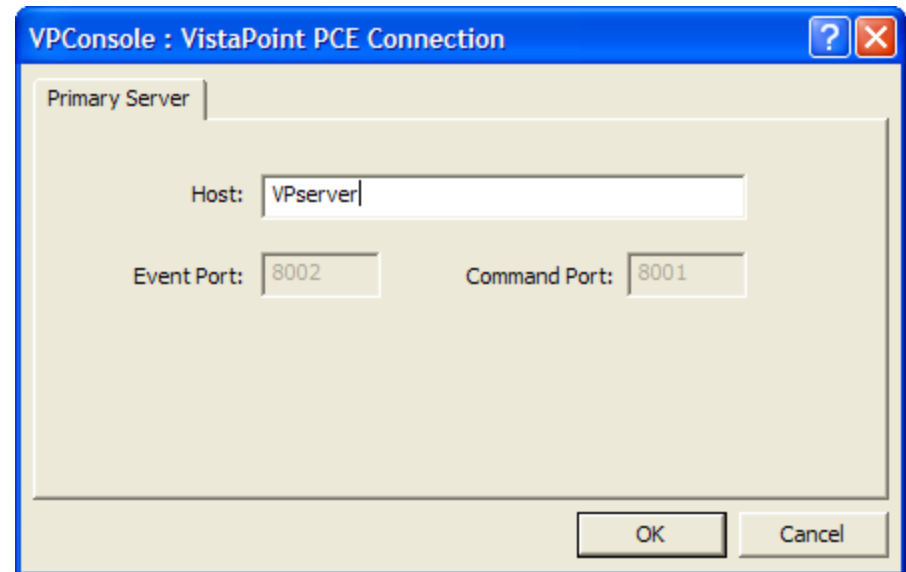


# VistaPoint Server Connection



When you launch your application and this dialog appears, it means that the VistaPoint Server cannot be found on the network. You will need to contact your IT administrator

**Host:** – This field must contain the name or IP address of the VistaPoint server





# Setting Number Format Options

- Click the **Number Format** tab.
- Configure settings:
  - In first box, enter number of digits used for extensions in your phone system.
  - In second box, enter number of digits required to dial a local phone number, not including trunk prefixes such as 9.
  - In the **CallerID Format** field, use the default setting of "(???) ???-?????" for most systems.
- Click the OK button to save the settings.

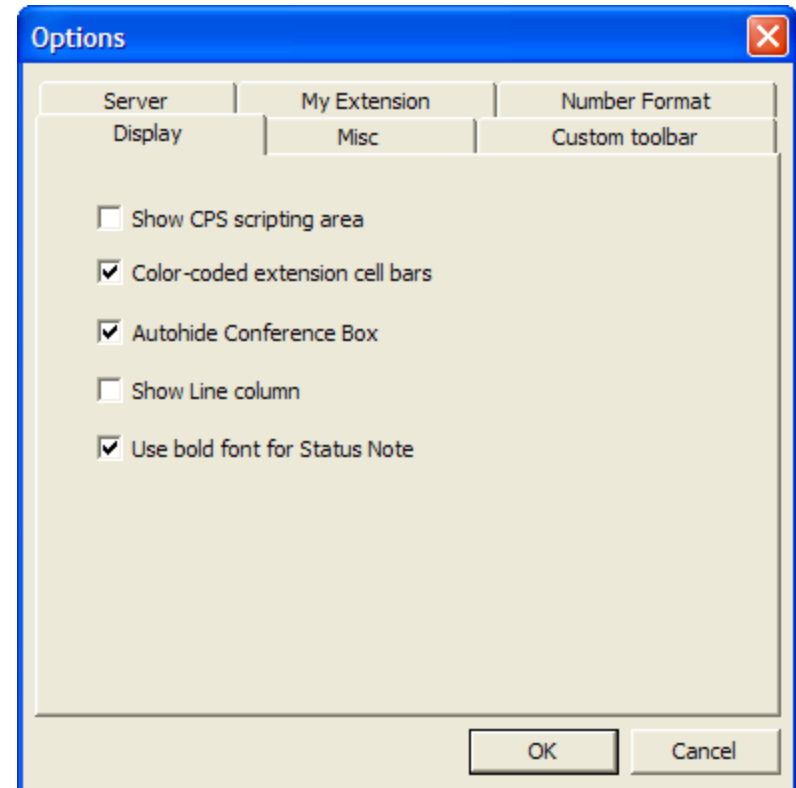
The screenshot shows the 'Options' dialog box with the 'Number Format' tab selected. The dialog has three tabs: 'Display', 'Misc', and 'Custom toolbar'. The 'Number Format' tab is active and contains the following settings:

- Server:** My Extension
- Maximum extension number length:** 4
- Local phone numbers length:** 7
- CallerID Format:** (???) ???-?????
- Buttons:** Dialing Properties..., OK, Cancel



# Setting Display Options

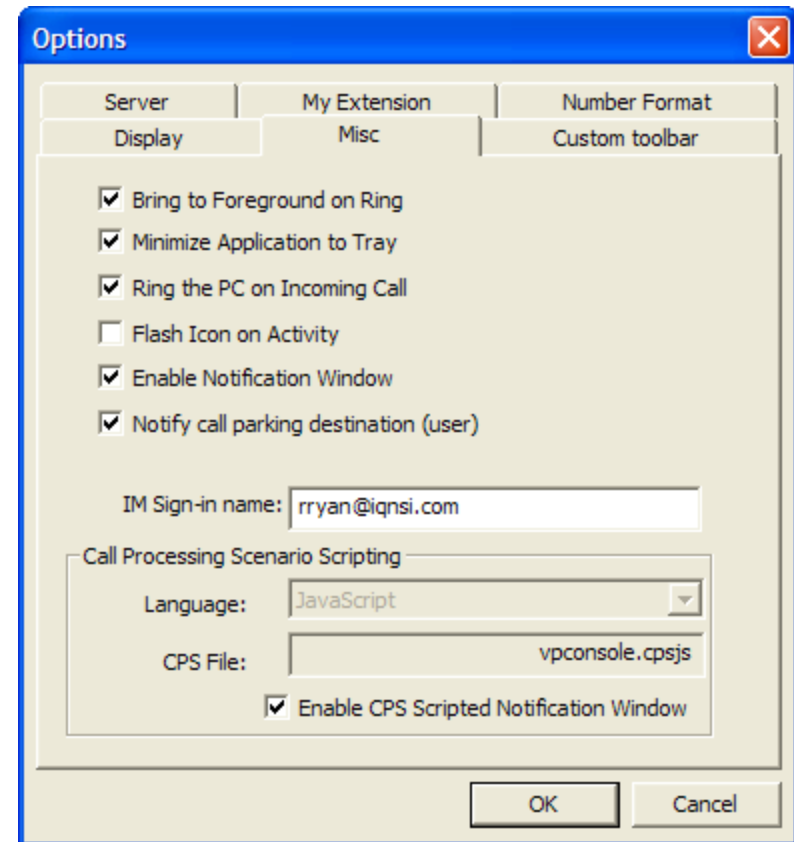
- Click the **Display** tab.
- Configure the settings in this tab, as desired:
  - **Show CPS Scripting Area** - Check this option to show the CPS Scripting panel above the Call List. This option is disabled by default, and should remain unchecked unless CPS scripts are being used.
  - **Color Coded Extension Cell Bars** - Check this option to set Extension cells to remain blue. After you change this setting, you must change to a different Extension Group or restart the program before the change will take effect.
  - **Autohide Conference Box** - Check this option to hide the Conference Box, until you create a conference. If this option is not checked, the Conference Box will always be visible to the right of the Call List.
  - Show Line Column – adds column in Call List to display line #
  - Use bold font for Status Note
- Click the OK button to save the settings.





# Setting Miscellaneous Options

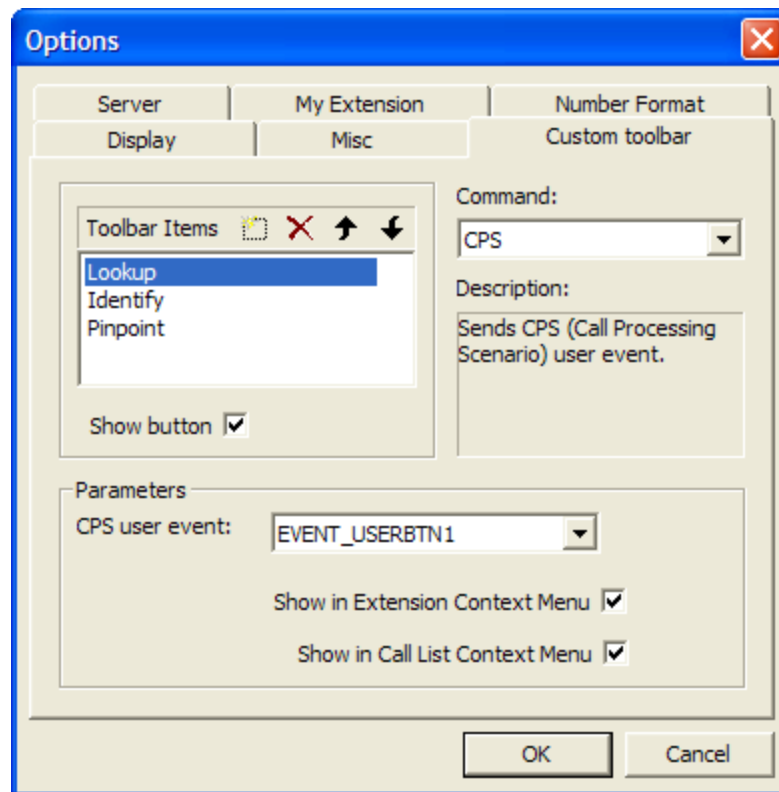
- Click the **Misc** tab.
- Select features desired:
  - **Bring to Foreground on Ring** - Brings the Main Window to the front of all programs when your extension rings.
  - **Minimize Application to Tray** - Places VistaPoint in the System Tray when you minimize the program. If not checked, minimizing will cause it to move to the Windows Task Bar instead.
  - **Ring the PC on Incoming Call** - Makes PC speakers ring when a call comes into your extension.
  - **Flash Icon on Activity** - Causes VistaPoint Companion to flash when it is minimized to the System Tray, when there is call activity.
  - **Enable Notification Window** - Shows a popup from the System Tray when call activity occurs.
  - **Notify Call parking destination** – when parking calls, you will be prompted to enter the extension that the caller is holding for. This option will send an IM to the requested party's desktop.
  - **IM Sign-in Name** - Used if you are integrating VistaPoint with Microsoft Windows Messenger. Enter your sign-in name.
  - NOTE: **Call Processing Scenario Scripting** is reserved for enhanced applications
- Click the OK button to save the settings.



# Custom Tool Bar



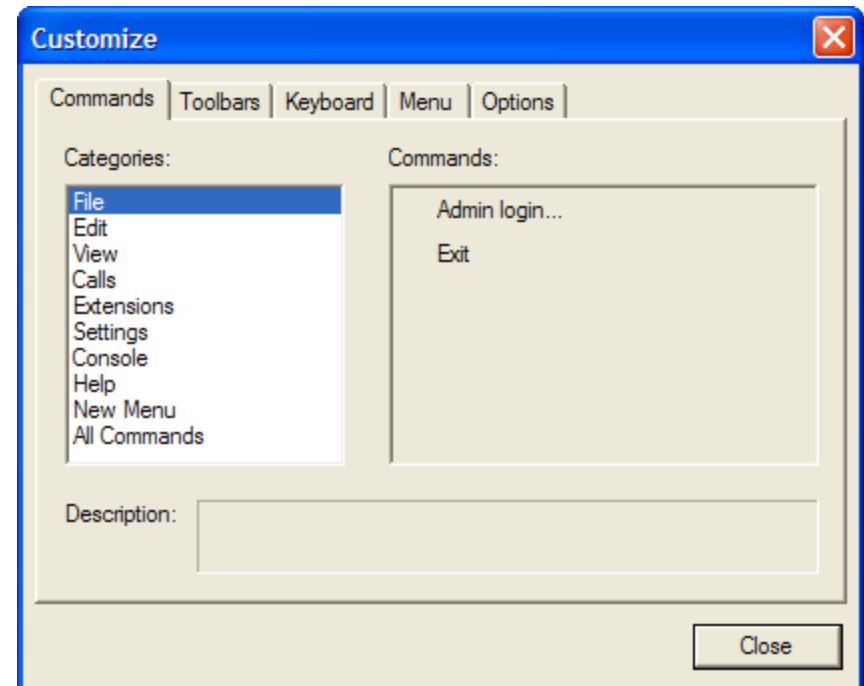
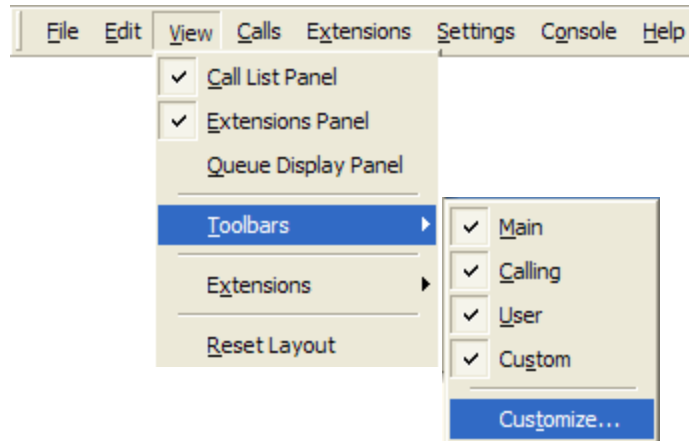
- Custom buttons can be added to the tool bar, to execute external programs, execute DDE commands, or trigger script events.
- Click the **Custom Toolbar** tab
- NOTE: These options are reserved for use by iQ's Professional Services group



# Customizing Toolbars, Keys, Buttons



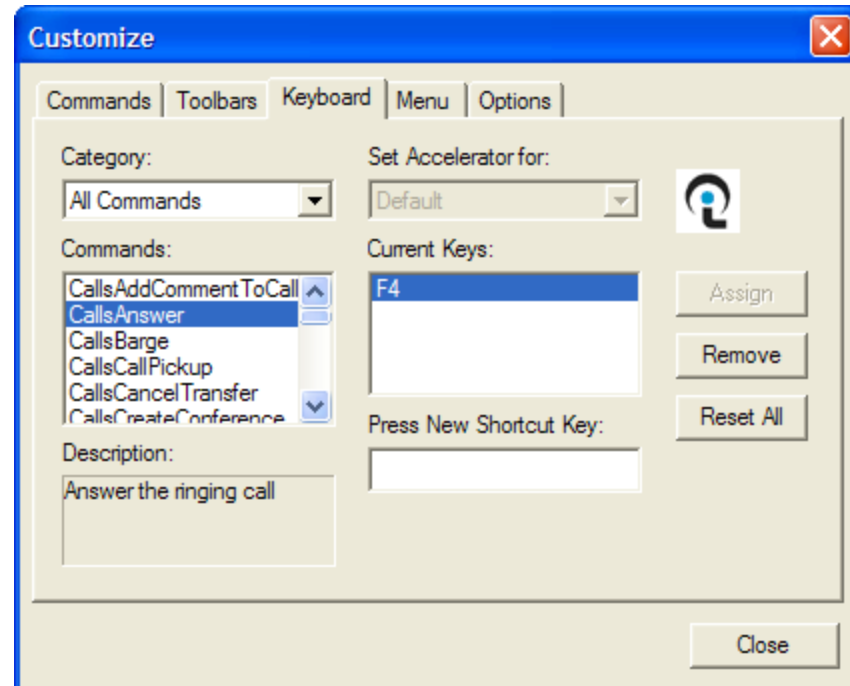
- On Menu Bar...
  - Click View > Toolbars > Customize, to bring up Customize dialog box
- The Customize dialog box allows you to customize toolbars, buttons, key assignments, menus, etc.



# Customizing - Keyboard



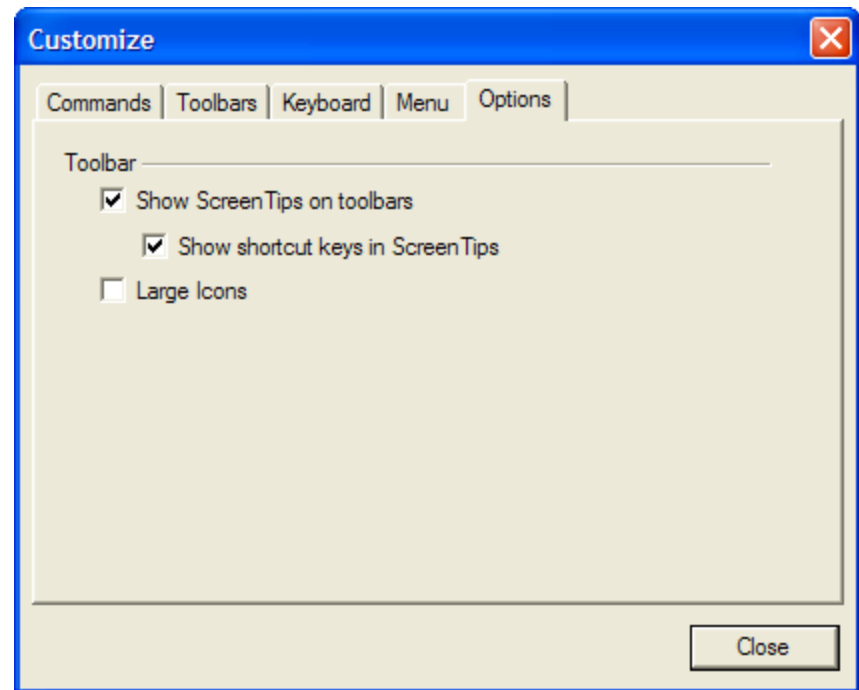
- **Keyboard Tab**
- You can modify the keyboard layout and configure how each key responds when processing calls.



# Customizing - Options



- **Options Tab**
- You can turn on/off tips or display large icons versus the default icons.







## *Troubleshooting Tips...*

1. If you are unable to transfer, conference, or perform other call control functions...
  1. Verify that you are able to perform the suspect functions via the phone. If not, then check the configuration of the PBX switch.
  2. Verify that the correct access codes are set in VistaPoint. Refer to the Installation and Administration Guide.
  
2. If you are not seeing call activity or BLF State changes
  1. Verify connectivity to the VistaPoint Server.
  2. Verify that the extension that VistaPoint Desktop is using is a monitored extension.



# Delivering Intelligent Telephony Solutions Today with an Advanced Architecture for Tomorrow

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