

Receptionist's Guide



This guide is intended for receptionists and anybody else who answers your company's incoming phone calls. It is important to use this guide to ensure that your company's calls are processed correctly and that people who answer your company's incoming calls understand their responsibilities. You must be a member of the Reception shared workspace to complete the tasks in this guide. (System administrators can also complete these tasks, if necessary.)

Complete the following tasks as soon as possible after your Business Central system has been set up.

Required Tasks for Receptionists

- 1 **Record the Auto-Attendant greeting.** See page 4.
- 2 **Change Reception's voice messaging system password.** See page 5.
- 3 **Record the Reception workspace's name in the directory.** See page 4.

Optional Tasks for Receptionists

- 4 **Record Reception's voicemail greeting.** See page 5.
- 5 **Change your company's incoming call flow.** See page 3.
- 6 **Configure phone status monitoring.** See page 8



Note: Refer to the User's Getting Started Guide to set up your personal phone and email service. If you are a system administrator, complete the steps in the Setup Guide and the System Administrator's Getting Started Guide before using this guide.



ATTENTION: Because the Business Central system software may have been updated since this guide was printed, refer to the Business Central online help, which is available through Business Central Manager, for the most up-to-date version of this guide.

About Incoming Calls

By default, when somebody phones your company, the call goes to the Reception workspace first. Depending on the configuration of the Reception workspace's incoming call flow, the call can go to the following destinations:

- **Go to the Auto-Attendant.** The caller can then find the intended workspace through the directory.
- **Ring phones assigned to Reception and its members.** The receptionist can then transfer the call to the intended workspace.

Use Business Central Manager to change workspace incoming call flows.

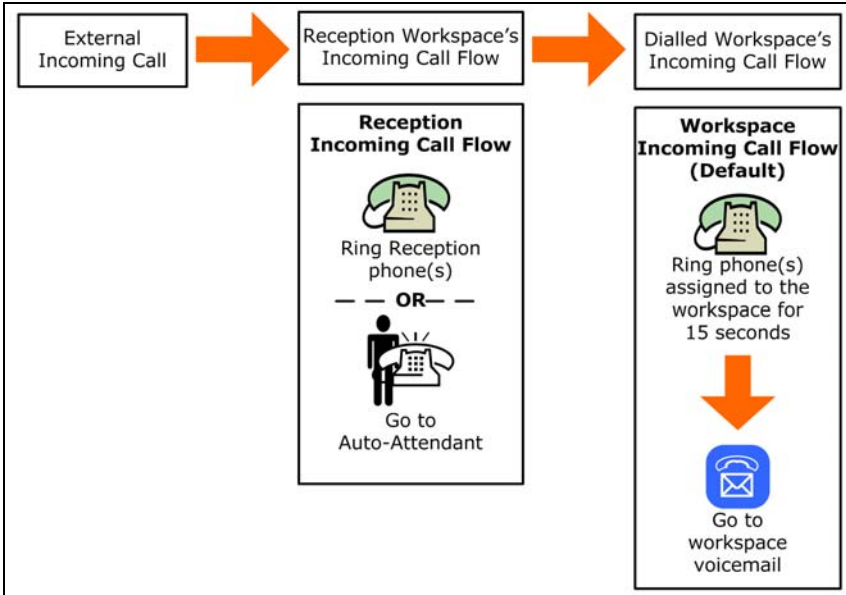


Figure 1 Incoming Call Flows

About the Auto-Attendant

The Auto-Attendant has two components:

- **The Auto-Attendant greeting**, which is the greeting people hear when they call your company and the Reception workspace's incoming call flow directs them to the Auto-Attendant. (For example, "Hello, and thank you for calling. If you know the extension of the person you are calling, please dial it now. Otherwise, please press 4 for the directory.") See page 4 for instructions on changing the Auto-Attendant greeting
- **The directory**, which is a dial-by-workspace-name phone directory that helps callers reach a workspace (person, department, or location) in your company. (There must be at least one workspace, other than the Reception workspace, with phone service.)

Internal callers can also dial 4 to access the directory without going through the Auto-Attendant.



Tip: When Reception's incoming call flow is configured to ring Reception phones and then go to the Auto-Attendant, set the Reception phones to Do Not Disturb (DND) when you will be away from the phone. While Do Not Disturb is turned on, incoming calls will go directly to the Auto-Attendant.

Changing Your Company's Incoming Call Flow

Reception's incoming call flow is very important because, by default, all of your company's external incoming calls go through Reception's incoming call flow first before being directed to another workspace by the receptionist or the Auto-Attendant. For more information, see About Incoming Calls on page 2.



ATTENTION: If the Reception workspace's incoming call flow is configured to direct calls to the Auto-Attendant, make sure at least one other workspace has phone service. Otherwise, callers will not be able to get through to another workspace from the Auto-Attendant.

To Change Reception's Incoming Call Flow

- 1 Log on to Business Central Manager.
For instructions, see the User's Getting Started Guide.
- 2 Select **Reception** in My Workspaces explorer.
- 3 Click the **Edit Properties** button.
- 4 In the list of properties, click **Phone Service**.
- 5 Click the **Incoming Call Flow** tab.

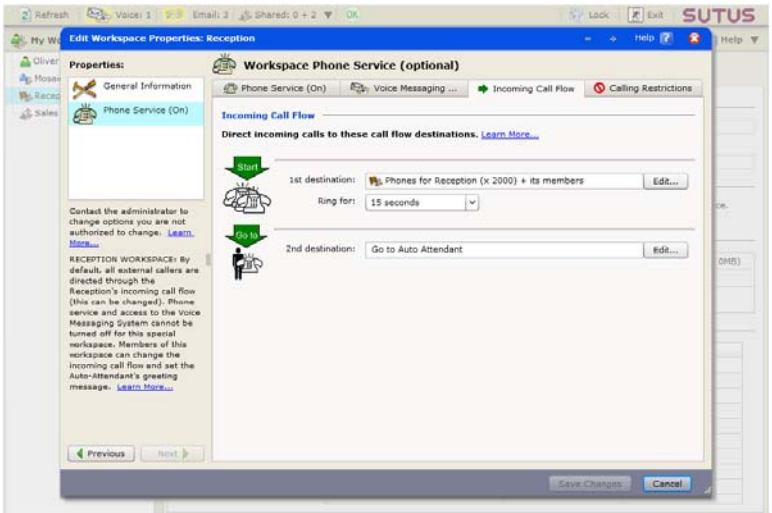


Figure 2 Edit Reception Workspace's Incoming Call Flow

- 6 Edit the incoming call flow as needed.
- 7 Click the **Save Changes** button.

Recording the Auto-Attendant Greeting

The Auto-Attendant greeting is the automated greeting people hear when they phone your company and are directed to the Auto-Attendant. Your Auto-Attendant greeting should include your company name and instructions for accessing the directory (dial 4).



Example Auto-Attendant Greeting: “Hello. You have reached Mosaic Paints. If you know the 4-digit extension number of the person you are calling, please dial it now. Otherwise, press 4 for the directory where you can enter your party’s name on your touch-tone phone. To contact Sales, dial 3000. To contact Customer Service, dial 4000. If you’re not sure which person or department you should speak to, dial 2222 for information.”

To Record the Auto-Attendant Greeting

- 1 Pick up the handset, dial **2**, and wait for the prompt.
- 2 (Optional) If the phone is not assigned to the Reception workspace, press **#**, and then enter the Reception workspace’s extension number (default is 2000).
- 3 Enter the Reception workspace’s VMS password (default is 0000).
- 4 Follow the voice prompts to record the Auto-Attendant greeting.

Recording the Reception Workspace’s Name in the Directory

You should record the Reception workspace’s name in the directory, so if people search for Reception in the directory they hear the name (Reception), not the extension number (default is 2000).

To Record the Reception Workspace’s Name in the Directory

- 1 Pick up the handset and dial ***** on a phone assigned to the Reception workspace, or a member of the Reception workspace, and wait for the voice prompt.
- 2 Do one of the following:
 - If the phone is assigned to the Reception workspace, enter the Reception workspace’s extension number (default is 2000), and enter the Reception workspace’s VMS password (default is 0000).
 - If the phone is assigned to another workspace, press **#**, enter the Reception workspace’s extension number (default is 2000), and enter the Reception workspace’s VMS password (default is 0000).
- 3 Press **3** (workspace settings).
- 4 Press **1** (workspace greetings).
- 5 Press **2** (record workspace name).
- 6 Follow the voice prompts to record the workspace name.



Note: You must also complete this task for your personal workspace. For more information, see the User’s Getting Started Guide.

Recording the Reception Workspace's Voicemail Greeting

The voicemail greeting is the greeting people hear when the Reception workspace's incoming call flow is set to go to voicemail as the final destination. In most cases, Reception's incoming call flow would not be set to go to voicemail, and so it would not require a voicemail greeting, but you can record one anyway. If you don't record a greeting, it will use the recorded workspace name in the default voicemail greeting.

To Record the Reception Workspace's Voicemail Greeting in the VMS

- 1 Pick up the handset and dial ***** on a phone assigned to the Reception workspace, or a member of the Reception workspace, and wait for the voice prompt.
- 2 Do one of the following:
 - If the phone is assigned to the Reception workspace, enter the Reception workspace's extension number (default is 2000), and enter the Reception workspace's VMS password (default is 0000).
 - If the phone is assigned to another workspace, press **#**, enter the Reception workspace's extension number (default is 2000), and enter the Reception workspace's VMS password (default is 0000).
- 3 Press **3** (workspace settings).
- 4 Press **1** (workspace greetings).
- 5 Press **1** (record voicemail greeting).
- 6 Follow the voice prompts to record the voicemail greeting.



Note: Also record a voicemail greeting and change the VMS password for your personal workspace. For more information, see the User's Getting Started Guide.

Changing the Reception Workspace's Voice Messaging System (VMS) Password

Change Reception's voice messaging system (VMS) password, so other people cannot access Reception's voicemail.

To Change Reception's VMS Password Through a Reception Phone

- 1 Pick up the handset and dial ***** on a phone assigned to the Reception workspace, or a member of the Reception workspace, and wait for the voice prompt.
- 2 Do one of the following:
 - If the phone is assigned to the Reception workspace, enter the Reception workspace's extension number (default is 2000), and enter the Reception workspace's VMS password (default is 0000).
 - If the phone is assigned to another workspace, press **#**, enter Reception's extension number (default is 2000), and enter the Reception workspace's VMS password (default is 0000).
- 3 Press **3** (workspace settings).
- 4 Press **2** (change password).
- 5 Follow the voice prompts to change the VMS password.
The VMS password must be 4-digits long.

Phone Documentation

The instructions in this guide assume you are using the Polycom SoundPoint IP 650 model desktop VoIP phone. If you are using another model of phone, please refer to the phone's documentation. PDFs of User Guides for supported Polycom phones are available through the Business Central Manager online help.



Note: Some Polycom phone features work differently with Business Central. For example, Business Central uses incoming call flows instead of call forwarding. When the Polycom and Business Central documentation differ, use the Business Central documentation.

Making a Phone Call

You can call another workspace by dialing its four-digit workspace extension. If you are not sure what the workspace's extension is, you can use the dial-by-workspace-name directory by dialing **4** on any workspace phone.



Tip: You do not need to press a phone line key before dialing. Simply take the phone off-hook and dial.

You do not need to dial 9 to make an external phone call.

Forwarding Calls

Phones connected to Business Central do not use call forwarding. They use Business Central's incoming call flows instead.

Use Business Central Manager to change workspace incoming call flows.

A typical incoming call flow for a workspace will ring the workspace's phone for a specified period of time and then send the call to voicemail. However, you can set up a different incoming call flow for the workspace. For example, you can change the incoming call flow to direct calls to another workspace's phones.

For more information, see About Incoming Calls on page 2.

Transferring a Call

You can transfer a phone call to another workspace or to the voice messaging system (VMS). Generally, you will only transfer a call to the VMS if an employee from your company is calling in to check his or her voicemail.

There are different types of call transfers:

- **Consultative transfer** — the person to whom you are transferring the call answers the phone before you transfer the call. You can consult with the person who answers the phone before transferring the call.
- **Blind transfer** — automatically transfer the call without waiting for the person to whom you are transferring to answer the call.
- **Attended transfer** — invite the person to whom you are transferring the call into a three-way conference call before exiting the conference and leaving the other two parties connected.

For more information and instructions, see the documentation for your phone.



Tip: Your company should have shared workspaces for groups, such as Sales, and all the salespeople should belong to that shared workspace. Then, you can transfer a call to the Sales workspace, and it will ring the phones of everybody who is a member. Any available salesperson can then answer the call.



Note: When you transfer a call to another workspace using consultative transfer, the caller ID will show the name of the workspace transferring the call (Reception), not the name of the original caller. However, when you do a blind transfer, the caller ID will show the name of the original caller.

To Transfer a Call (Consultative Transfer) — Polycom SoundPoint IP 650

- 1 While the call to transfer is on the line, press **Transfer**.
The call is placed on hold.
- 2 Enter the extension number to which to transfer the call.
- 3 When the person to whom you are transferring the call answers the phone, consult with him about the transfer, and then press **Transfer** again.
The transfer is now complete and you can hang up your phone.

To Transfer a Call (Blind Transfer) — Polycom SoundPoint IP 650

- 1 While the call to transfer is on the line, press **Transfer**.
- 2 Press the **Blind** soft key.
- 3 Enter the extension number to which to transfer the call.
- 4 Press **Transfer** again.
The transfer is now complete and you can hang up your phone.

To Transfer a Call (Attended Transfer) — Polycom SoundPoint IP 650

- 1 While the call to transfer is on the line, press **Conference**.
The call is placed on hold.
- 2 Enter the extension number to which to transfer the call.
- 3 When the person to whom you are transferring the call answers the phone, press **Conference** again.
You are now connected to both parties.
- 4 To leave the call, hang up your phone. The other two parties will remain connected.

To Transfer an Outside Caller to Voicemail

- Transfer the call to the workspace's extension number.
If that workspace extension has voicemail as an incoming call flow destination, the call will go to voicemail, typically after ringing the workspace's phone.

To Transfer an Employee to the Voice Messaging System (VMS)

- If an employee who is out of the office calls in and wants to check her voicemail, you can transfer her to the VMS by transferring her call to ***9**.

Using Multiple Call Appearances

Some desktop VoIP phones support multiple phone line (call appearances) buttons. Multiple call appearances enable you to have more than one active call on your phone at a time. The phone's display label appears beside each call appearance. You can change the phone's number of call appearance buttons in Business Central Manager. A minimum of two call appearances is recommended. If the first call appearance is in use, the incoming call will ring on the second call appearance. You has several options for responding to the call appearance:

- Answer the second call appearance, putting the first call on hold
- Press the Do Not Disturb button to send the call to the next incoming call destination (usually voicemail)
- Let the call go to the next incoming call destination automatically after a number of seconds

For more information, see the Using Phones chapter of the User's Guide.

Configuring Phone Status Monitoring

You can configure your phone's line buttons to display whether another workspace's phones are busy or idle.

Any phone line buttons that are not being used as call appearance buttons can be configured as phone status buttons. Phone status buttons also act as speed dial buttons to call the workspace associated with the button.

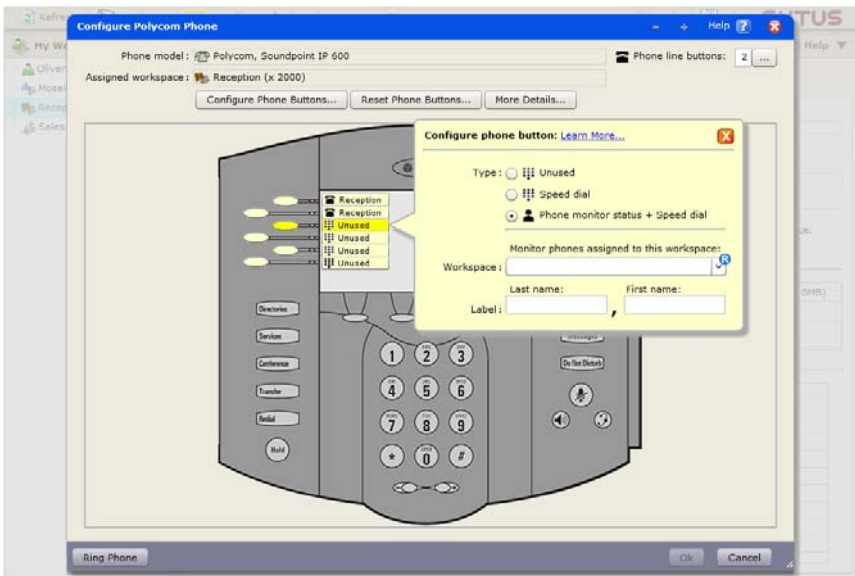


Figure 3 Configure Phone Buttons – Phone Status Monitoring

For more information, see the Using Phones chapter of the User's Guide, which is available through the Business Central Manager online help.

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