



FortiVoice™ Console v7.20

User Guide



FortiVoice™ Console v7.20 User Guide

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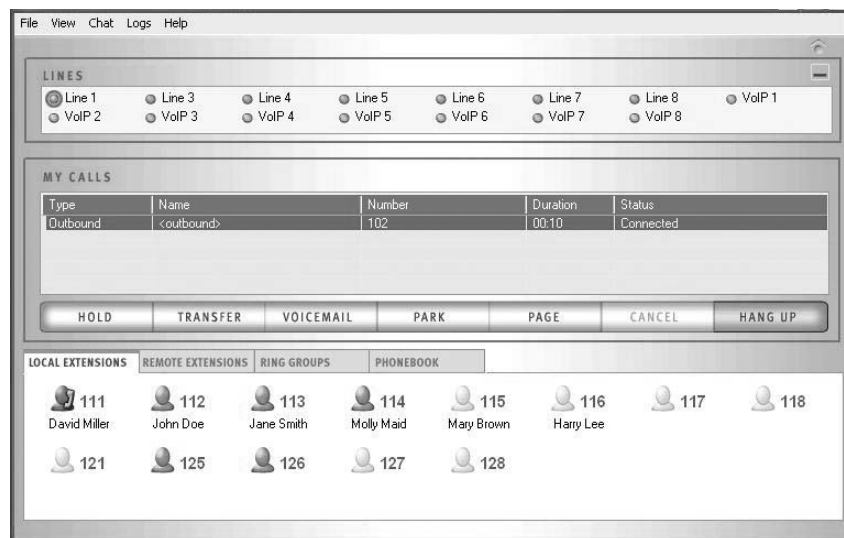
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Introduction

This application is an add-on that allows you to monitor telephone lines, VoIP lines and extensions, and to perform call handling on your PC. Call handling includes putting calls on hold, and transferring, parking and redirecting calls. You can also page users, call users, and chat with users through text messaging.

There are two components to this application:

- The Communications Manager connects to the phone system. Only one instance of the Communications Manager is required per system.
- The Console is the component that users interface with on their PCs. You can run a console for every phone user in a system. The figure below shows the main window.



System Requirements

Phone system

Phone systems running 7.20 software and firmware or higher.

Operating system

- Windows 2000
- Windows XP
- Windows Vista (32-bit)
- Server 2003

Computer hardware

| Item | Communications Manager | | Console | |
|---------------|-------------------------|--------------------------------|--------------------------|--------------------------------|
| | Minimum | Recommended | Minimum | Recommended |
| Hard Drive | 30MB | 30MB | 30MB | 30MB |
| RAM | 512MB | 1GB | 256MB | 512MB |
| CPU | Pentium 3 @ 1GHz | Pentium 4 @ 2+GHz | Pentium 2 @ 400 MHz | Pentium 3 @ 500 MHz |
| Screen | 800x600 16-bit color | 1280x1024 32-bit true color | 1024x768 16-bit color | 1280x1024 32-bit true color |
| Network Speed | 128 Kbits/sec | 256+ Kbits/sec | 128 Kbits/sec | 256+ Kbits/sec |

LAN configuration

For better performance, connect the server running the Communications Manager to the same LAN (local area network) as the computers running the Console. Connecting to the server outside the LAN, via the Internet or other network does introduce lag time into communications.

Communications Manager


Communications Manager runs as a Windows service and manages the exchange of information with the phone system. It does not need to be installed on a server-class PC. Only one instance of Communications Manager is required for the Console applications to exchange data with the system.

Communications Manager Icon

When Windows is started, Communications Manager will automatically start and connect to the phone system. The *Communications Manager* icon will appear in the system tray. The “[Icon state](#)” indicates the status of the Windows service, and whether Communications Manager is connected to the phone system. Right-clicking the icon displays a pop-up menu.

The software installation includes Apple Inc’s Bonjour software for automatic discovery of the phone system equipment on your network.

Icon state

| | |
|---|--|
|  | Windows service stopped, Communications Manager not connected to the system. |
|  | Windows service running, Communications Manager not connected to the system. |
|  | Windows service running, Communications Manager connecting to the system. |
|  | Windows service running, Communications Manager connected to the system. |

Pop-up menu

Right-clicking the *Communications Manager* icon displays a pop-up menu that allows you to:

- Start or stop the Windows service
- Manually connect to or disconnect from the phone system
- Open the *Communications Manager Administration* window
- Open the *Console* window
- Determine the Console version number
- Remove the *Communications Manager* icon

Starting the Windows service

The Windows service must be running in order for Communications Manager to connect to the system.

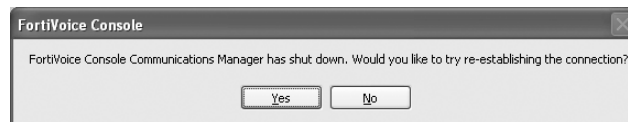
- Right-click the *Communications Manager* icon in the system tray, and then select *Start the Service*.

Once the Windows service is started, the command toggles to *Stop the service*.

Stopping the Windows service

1. Right-click the *Communications Manager* icon in the system tray, and then select *Stop the Service*.

Users running the Console get a message indicating that Communications Manager has shut down. If they click *Yes*, the Console will attempt to reconnect. If they click *No*, the Console shuts down.



Once the Windows service is stopped, the command toggles to *Start the service*.

Manually connecting to the phone system

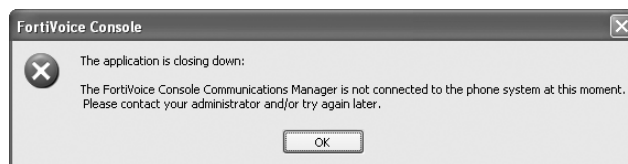
1. Right-click the *Communications Manager* icon in the system tray, and then select *Connect to the phone system*.

Once the connection is established, users can start the Console. The command toggles to *Disconnect from the phone system*.

Disconnecting from the phone system

1. Right-click the *Communications Manager* icon in the system tray, and then select *Disconnect from the phone system*.

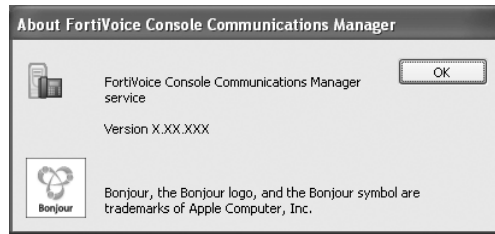
Users running the Console get a message indicating that Communications Manager is not connected. The instances of the Console then shut down.



Determining the Console version number

1. Right-click the *Console Communications Manager* icon in the system tray, and then select *About Console*.

A window appears showing the version number.



Removing the Communications Manager icon

1. Right-click the *Communications Manager* icon in the system tray, and then select *Exit*.

The icon is removed from the system tray, however Communications Manager remains in its state (service running or stopped, connected or disconnected from the phone system).

Restoring the Communications Manager icon

1. Click *Start > Programs > FortiVoice > FortiVoice Console 1.30 > FortiVoice Console Server Tray*.

The icon appears in the system tray.

Communications Manager Administration

The *Communications Manager Administration* window contains the parameters for the connection with the system, the user permission levels, and a list of users who are connected. It also allows you to activate a demonstration version of the Console. The window contains the following tabs:

- “Communication tab”
- “User Permissions tab”
- “Connected Consoles tab”
- “Activation tab”

Opening the Communications Manager Administration window

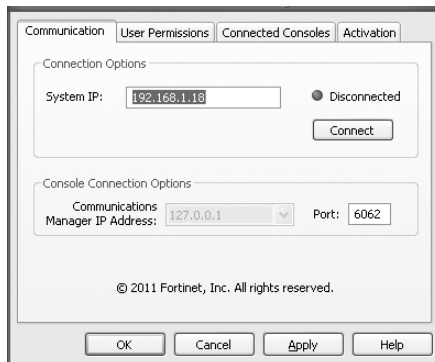
1. Right-click the *Communications Manager* icon, and then select *Configuration*.

The *Communications Manager Administration* window appears.

Alternatively, you can choose *View > Communications Manager Options* in the *Console* window.

Communication tab

The *Communication* tab shows the state of the connection to the system, contains the connection parameters, and allows you to connect to or disconnect from the system.



Connection

The *Connection* indicator has three states:

- Green indicates Communications Manager is connected to the system.
- Yellow indicates Communications Manager is connecting to the system.
- Red indicates Communications Manager is disconnected from the system.

System IP

Communications Manager auto-discovers the phone system IP address. You only need to enter it manually if the phone system cannot be discovered.

Communications Manager IP Address

The *Communications Manager IP Address* list shows the IP address of the NIC (network interface) card in the computer running Communications Manager.

The Console will auto-discover the *Communications Manager IP Address* when started. If the Console is connecting from a remote location, and cannot auto-discover the IP address, the user must manually enter the address from the *Communications Manager IP Address* list.

Port

The *Port* box shows the connection port number. If required, users will enter this into the *Communications Manager Port* box when starting the client.

Manually connecting to the phone system

1. Click the *Connect* button. The button toggles to *Disconnect*.

Alternatively, you can right-click the *Communications Manager* icon in the system tray, and then select *Connect to the phone system*.

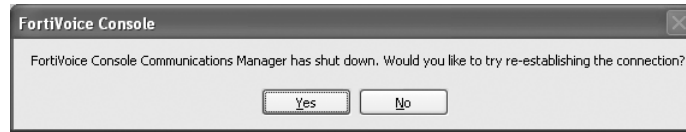
Once the connection is established, users can start the Console.

Disconnecting from the phone system

1. Click the *Disconnect* button. The button toggles to *Connect*.

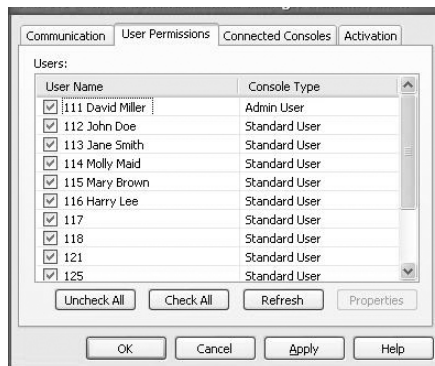
Alternatively, you can right-click the *Communications Manager* icon in the system tray, and then select *Disconnect from the phone system*.

Users running the Console get a message indicating that Communications Manager is not connected. The instances of the Console then shut down.



User Permissions tab

The *User Permissions* tab shows the users who have permission to run the Console, as well as their permission levels. You can add or remove users, and can assign passwords and permission levels.



Adding a user

1. Select the checkbox beside the user name. The *Properties* window appears.



2. Optionally enter a password in the *Password* box. A password prevents other users from logging in with the extension number. The password can be 1 to 31 alphanumeric characters long.
3. Optionally select the *Administrator* checkbox. The Administrator permission level enables the *View > Communications Manager Options* menu command in the Console.

Removing a user

1. Clear the checkbox beside the user name.

Adding all users

1. Click the *Check All* button.

Removing all users

1. Click the *Uncheck All* button.

Setting the password and permission level

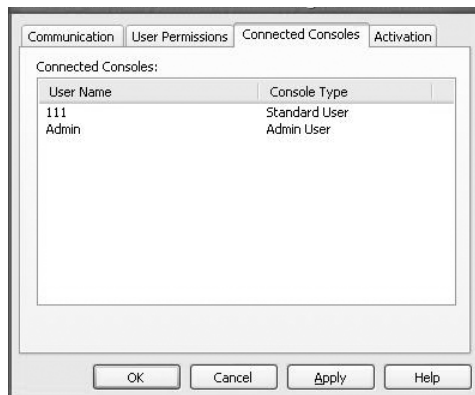
1. Select the user name, and then click the *Properties* button. The *Properties* window appears.



2. Optionally enter a password in the *Password* box. A password prevents other users from logging in with the extension number. The password can be 1 to 31 alphanumeric characters long.
3. Optionally select the *Administrator* checkbox. The Administrator permission level enables the *View > Communications Manager Options* menu command in the Console.

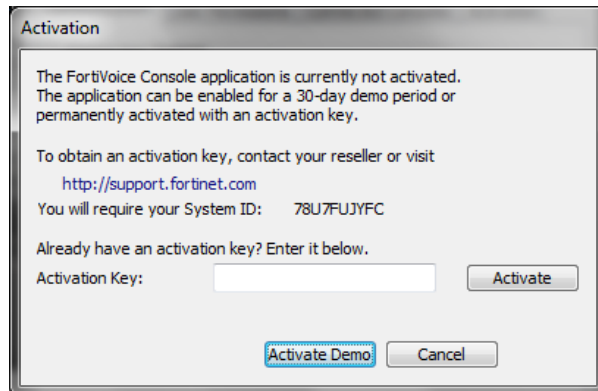
Connected Consoles tab

The *Connected Consoles* tab shows users currently running the Console, as well as their permission levels. The Admin user also appears if the *Communications Manager Administration* window was started on the computer running Communications Manager.



Activation tab

The *Activation* tab allows you to permanently activate a demonstration version of the Console.



Activating

1. Purchase a license code.
2. Follow the instructions that came with your code to get an activation key.
3. Enter the activation key into the *Key* box of the *Activation* tab, and then click *Activate*. A confirmation window appears and requests a reboot of the phone system to complete the process.
4. Click *OK*.

The Console

The Console allows you to monitor telephone lines, VoIP lines and extensions, and to perform call handling. Up to 64 instances of the Console can be customized and used per system.

The *Console* window shows the telephone lines, VoIP lines and extensions, and allows you to perform call handling.

You can customize the Console using the *Console Preferences* window.

Starting the Console

Before starting the Console:

- The Windows service of Communications Manager must be running. See [“Starting the Windows service”](#) on page 4.
- Communications Manager must be connected to the phone system. See [“Manually connecting to the phone system”](#) on page 4.

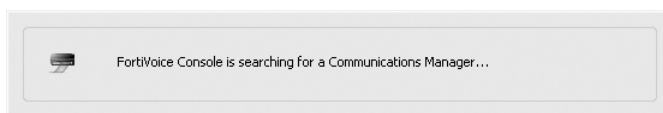
1. Start the Console using one of the following methods:

- Double-click the *Console* icon on your desktop.



- Click *Start > Programs > FortiVoice > FortiVoice Console 7.20 > FortiVoice Console Server Tray*.
- On the server, right-click the *Communications Manager* icon in the system tray, and then select *Console*.

A window appears, indicating that the Console is searching for a Communications Manager.



The *Console Login* window then appears.

A login window titled "Login Information". It contains two sections: "Login Information" and "Connection Options". In the "Login Information" section, there are two text boxes: "Extension:" with the value "111" and "Password:". To the right of the "Extension:" box is a checkbox labeled "Save password". To the right of the "Password:" box is a checkbox labeled "Sign me in automatically". In the "Connection Options" section, there are two text boxes: "Communications Manager IP:" with the value "127.0.0.1" and "Communications Manager Port:" with the value "6062". At the bottom of the window are two buttons: "Connect" and "Cancel".

2. Enter your *Extension* number.
3. Optionally enter your *Password*.
4. Optionally select the *Save password* checkbox to store your password for future sessions.

5. The Console auto-discovers the *Communications Manager IP* address. This is the IP address of the NIC card in the computer running the Console Communications Manager.
If the Console is connecting from a remote location, and cannot auto-discover the IP address, then manually enter the address from the *Communications Manager IP Address* list in the *Communication* tab of the *Communications Manager Administration* window.
6. If required, enter the *Communications Manager Port* number. This is the connection port number of the server running the Communications Manager. Use the port number from the *Port* box in the *Communication* tab of the *Communications Manager Administration* window.
7. Click the *Connect* button. The *Console* window appears.

Console Window

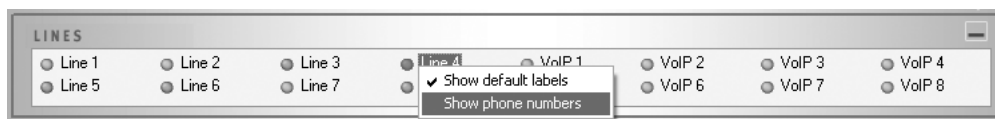
The *Console* window shows the telephone lines, VoIP lines and extensions, and allows you to perform call handling. The window is divided into three areas:

- “Lines area”
- “My Calls area”
- “Extensions area”

Lines area

The *Lines* area lists all your telephone lines and VoIP connections. They are represented with an indicator light and the number of the line. The indicator light shows the line state.

The *Lines* area can be hidden or shown. Telephone lines can be displayed with the default label or with the associated phone number.



If you mouse over a telephone line after it starts ringing and the Caller ID has been captured, the window will display the Caller ID information.

Toggling the Lines area





1. To hide the *Lines* area, choose *View > Minimize Phone Lines*.
2. To show the *Lines* area, choose *View > Maximize Phone Lines*.

Alternatively, you can hide and show the *Lines* area by clicking the icon in the top right corner of the area.

Configuring the Lines area

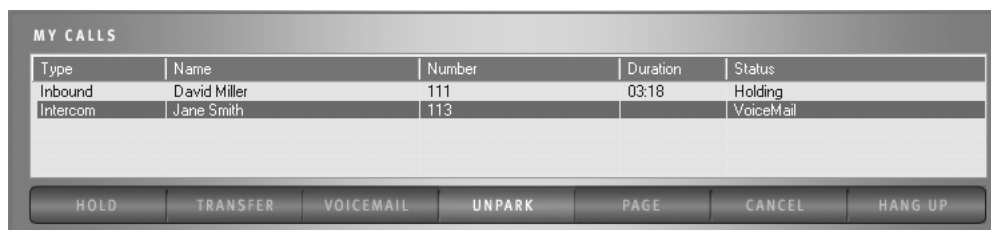
1. To use default labels, right-click the *Lines* area, and then select *Show default labels*.
2. To use phone numbers, right-click the *Lines* area, and then select *Show phone numbers*.

Line states

| | | |
|---|--------------|--|
|  | Solid green | The line is available. |
|  | Solid red | The line is in use/connected. |
|  | Flashing red | The line is ringing, on hold, or parked. |
|  | Solid gray | The line is not connected. |

My Calls area

The *My Calls* area shows your current call activity, and has buttons to perform call handling. See [“Using the Console” on page 23](#) for information on how to handle calls.



My Calls list

| | |
|-----------------|---|
| <i>Type</i> | <i>Inbound, Outbound, or Intercom.</i> An inbound call is to your office. An outbound call is from your office. An intercom call is between two local extensions. |
| <i>Name</i> | The name of the caller (Caller ID). |
| <i>Number</i> | For outbound calls, the number dialed. For inbound calls, the Caller ID information. For intercom calls, the other local extension number. |
| <i>Duration</i> | The duration of the call. If the call is put on hold, the clock switches to 0:00 and shows the hold time. When the call is taken off hold, the clock returns to the connect time. |
| <i>Status</i> | <i>Connected, Initiated, Ringing, Voicemail, Holding, Parked or Queued.</i> |

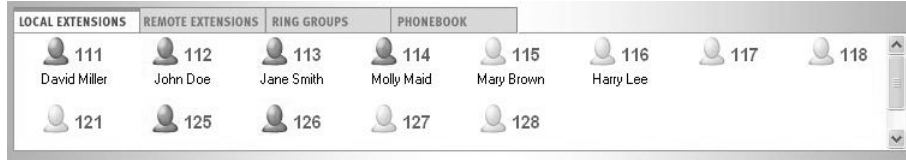
My Calls buttons

| | |
|--------------------|---|
| <i>HOLD/UNHOLD</i> | Puts a call on hold, or takes a call off hold. |
| <i>TRANSFER</i> | Transfers a call to a local extension, remote extension, or extension ring group. |
| <i>VOICEMAIL</i> | Transfers a call to your voicemail, local extension voicemail, remote extension voicemail, or to general voicemail. |
| <i>PARK/UNPARK</i> | Puts a call on hold in a park orbit (500–509), or displays a list of parked calls. |
| <i>PAGE</i> | Pages an extension ring group, intercom, or overhead PA system. |
| <i>CANCEL</i> | Cancels a screened transfer while the other user's local extension is ringing. |
| <i>HANG UP</i> | Disconnects the call. |












Extensions area

The *Extensions* area shows extension icons. The extension icon shows the extension's state, as described below. The extension number and user's name appears with each extension icon.

The *Extensions* area can either show the local extensions, remote extensions and extension ring groups all together, or in separate tabs.



Extension states

| | | |
|---|----------------------------------|---|
|  | Solid green | The local extension is available to receive a call. |
|  | Solid green with note | The local extension is available to receive a call or text message. |
|  | Red/gray flashing fast | The local extension is ringing. |
|  | Solid red with no receiver | The local extension is on hold or parked. |
|  | Solid red with note | The local extension is on hold or parked, but is available to receive a text message. |
|  | Solid red with receiver | The local extension is busy. |
|  | Solid red with receiver and note | The local extension is busy, but is available to receive a text message. |
|  | Gray | The local extension has Do not Disturb mode enabled. It is not available to receive a call or text message. |
|  | Gray | Unregistered IP extension. |
|  | Green | Remote extension. No status information is available. |
|  | Blue | Extension ring group. No status information is available. |

Getting help

Starting online help

1. Choose *Help > Console Help*.
Online help starts for the Console.

Opening the User Guide

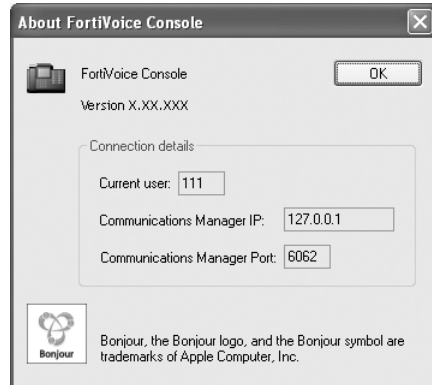
1. Choose *Help > User Guide (PDF)*.
The *Console User Guide* opens.

Determining the Console version number

1. Choose *Help > About*.

A window appears showing the version number.

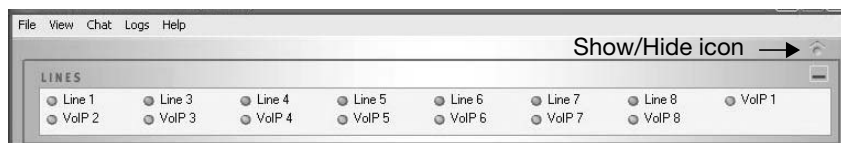
Alternatively, you can also right-click the *Communications Manager* icon in the system tray, and then select *About Communications Manager*. This is available on the server only.



Configuring the Console windows

Toggleing the menu commands

1. Click the *Show/Hide* icon to toggle display of the menu commands.



Alternatively, mousing over the title bar will cause the hidden menu commands to appear.

Closing the Console window

1. Choose *File > Exit*.

The *Console* window closes.

Opening the Communications Manager Administration window

Only users with Administrator permission level can open the *Communications Manager Administration* window from the Console.

1. Choose *View > Communications Manager Options*.

The *Communications Manager Administration* window appears.

Alternatively, you can also right-click the *Communications Manager* icon, and then select *Configuration*. This is available on the server only.

Console Preferences Window

The *Console Preferences* window contains the following tabs:

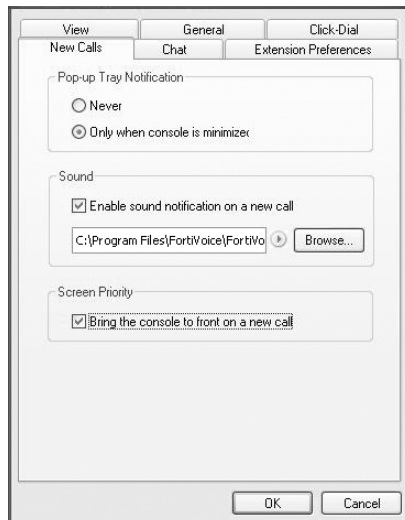
- “New Calls tab”
- “Chat tab”
- “Extension Preferences tab”
- “View tab”
- “General tab”
- “Click-Dial tab”

Opening the Console Preferences window

1. Choose *View > Console Preferences*. The *Console Preferences* window appears.

New Calls tab

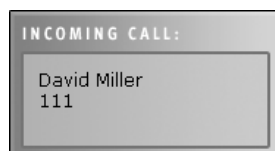
The *New Calls* tab sets how the Console reacts when you receive a new call.



Pop-up Tray Notification

The *Never* option disables pop-up call notification.

The *Only when client is minimized* option provides a small pop-up call notification when you receive a new call, if the *Console* window is minimized.



Sound

Selecting the *Enable sound notification on a new call* checkbox plays the selected .wav file when you receive a new call. This provides an alternative to your phone ringer.

The *Play* icon plays the selected .wav file.

The *Browse* button allows you to select the .wav file. The Console comes with several .wav files. They are located in the folder:

`\Program Files\FortiVoice\FortiVoice Console 7.20\Sounds`

Screen Priority

Selecting the *Bring the client to front on a new call* checkbox brings the *Console* window in front of the other applications when you receive a new call. This is useful if your computer shares a monitor for call handling and other work.

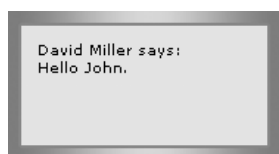
Chat tab

The *Chat* tab sets how the Console reacts when you receive a new text message.



Pop-up Tray Notification

The *Enable when chat window is minimized* option provides a small pop-up notification when you receive a new text message, if the *Talking to* window is minimized.



Sound

Selecting the *Enable sound notification on a new text message* checkbox plays the selected .wav file when you receive a new text message.

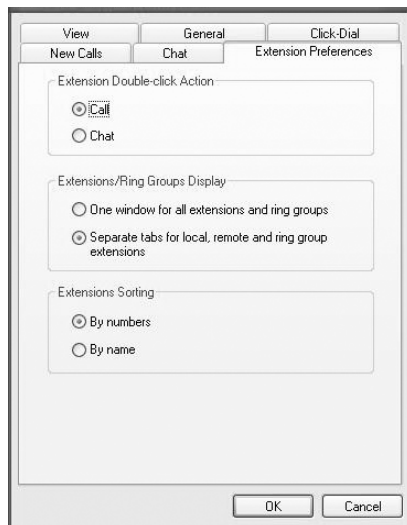
The *Play* icon plays the selected .wav file.

The *Browse* button allows you to select the .wav file. The Console comes with several .wav files. They are located in the folder:

`\Program Files\FortiVoice\FortiVoice Console 7.20\Sounds`

Extension Preferences tab

The *Extension Preferences* tab sets the action that occurs when you double-click an extension icon. The extension must be available for the action to occur. The tab also sets up the *Extensions* area of the *Console* window.



Double-click Action

The *Call* option will place your extension and the extension you are calling in intercom mode, and both extensions will ring.

The *Chat* option will open the *Talking to* window on your computer. After you type and send the message, it will pop-up on the other user's computer.

Extensions/Ring Groups Display

The *One window for all extensions and ring groups* option displays the local extension icons, remote extension icons, and extension ring group icons all together in the *Extensions* area.

The ***Separate tabs for local, remote and ring group extensions*** option displays the local extension icons, remote extension icons, and extension ring group icons in separate tabs in the *Extensions* area.

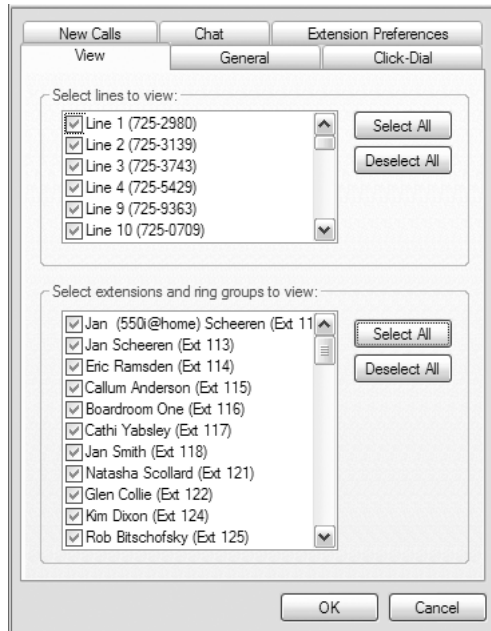
Extensions Sorting

The *By numbers* option sorts the extensions by extension number

The *By name* option sorts the extensions by user name.

View tab

The *View* tab allows you to select the telephone lines, VoIP lines and extensions that appear in the *Console* window.

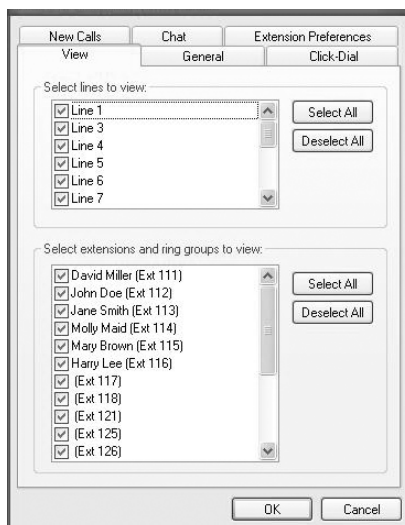


Clicking *Select All* selects all the lines, VoIP lines and extensions.

Clicking *Deselect All* clears all the lines, VoIP lines and extensions.

General tab

The *General* tab sets how the *Console* window is minimized, whether the Console starts automatically after Windows is started, the duration of pop-up messages, and the color scheme.



“Minimize” button

The *Minimize to the task bar* option will minimize the *Console* window to a task bar icon.



The *Minimize to the system tray* option will minimize the *Console* window to a system tray icon.



Click the task bar icon or system tray icon to restore the window.

Log on behavior

Selecting the *Automatically start the Console when I log on to this computer* checkbox will automatically start the Console after you start Windows.

Notification pop-up timer

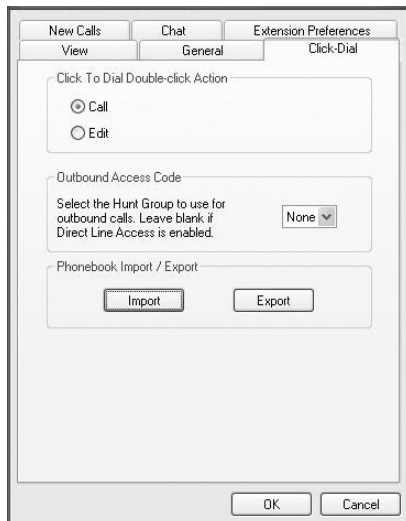
The *Close pop-up after* list sets how long a notification message will remain on your computer when you receive a call or chat. Choices range from *5 seconds* to *30 seconds*.

Color scheme

The *green*, *gray*, *blue*, and *silver* options set the color scheme of the *Console* window.

Click-Dial tab

In this tab, you specify what happens when you double-click a *Phonebook* icon and you set the outbound dial access code if required. You can also import or export phonebook data.



Double-click action

Select *Call* to have double-clicks trigger the system to call the entry.

Select *Edit* to have double-clicks open the phonebook entry for editing.

Line/Outbound Access

Here you specify the hunt group number to dial to seize an outbound line. If Direct Line Access is enabled for this extension, select *None* in the pull-down list.

Phonebook Import/Export

Import allows the addition of entries from a comma delimited text file.

Export makes a copy of the phonebook in a comma-delimited text file that can be loaded into other applications or other users' Consoles.

Call Logs Window

Opening the Call Logs window

1. Choose *Logs > View Logs*. The *Call Logs* window appears.

| Date | Time | Type | Name | Number | Status | Duration |
|------|------|------|------|--------|--------|----------|
|------|------|------|------|--------|--------|----------|

The *Call Logs* window lists calls made and received by the extension. The calls can be sorted based on date range or time.

The date range is set to the current day by default. Select the range of calls that you wish to see.

2. Under *Type*, specify inbound calls, outbound calls or both.
3. Check options next to *Include* to further refine the list to the following types of calls:
 - Calls that were connected to the extension
 - Calls that went to voice mail for the extension
 - Intercom calls to the extension
 - Missed calls
 - Calls that were queued at the extension

Calls are listed with:

- Date
- Time
- Type
- Name (if available)
- Number of caller
- Status, which includes Connected, Intercom, Queued etc.
- Duration, which is the time a call spent in the status listed.

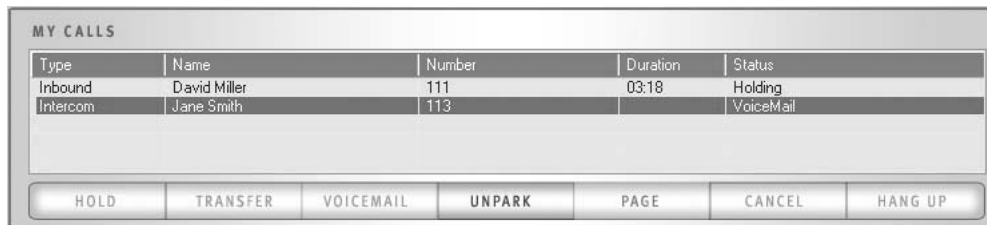
Right-clicking a call provides the following options:

- Dial — connect the extension and dial the caller.
- Edit & Dial — allows you to enter a line hunt group if required before dialing the call.
- Add to Phonebook — adds the caller to the phonebook tab.

You can print or save a call log.

Using the Console

The Console provides all of the functions required for handling incoming and outgoing calls. The call handling functions are available by right-clicking a call in the *My Calls* area, or by using the buttons.



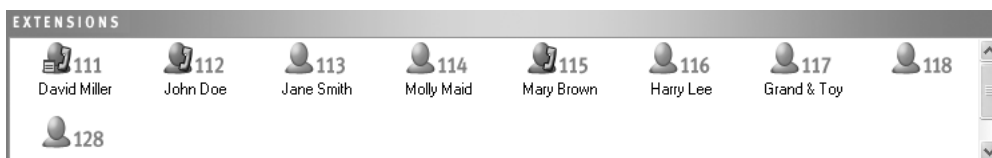
| Type | Name | Number | Duration | Status |
|----------|--------------|--------|----------|-----------|
| Inbound | David Miller | 111 | 03:18 | Holding |
| Intercom | Jane Smith | 113 | | VoiceMail |

HOLD TRANSFER VOICEMAIL UNPARK PAGE CANCEL HANG UP

The call handling functions include:

- “Hold/Unhold”
- “Transfer”
- “Transfer to Voicemail”
- “Park/Unpark”
- “Page”
- “Cancel”
- “Hang Up”
- “Redirect”

You can also “Chat” with another user through text messaging, or can “Call” another user. These functions are available by right-clicking an extension in the *Extensions* area.



| EXTENSIONS | | | | | | | |
|---------------------|-----------------|-------------------|-------------------|-------------------|------------------|--------------------|-----|
| 111 David Miller | 112 John Doe | 113 Jane Smith | 114 Molly Maid | 115 Mary Brown | 116 Harry Lee | 117 Grand & Toy | 118 |
| 128 | | | | | | | |

Hold/Unhold

You can put a call on hold so you can hang up without losing the caller. This way you can answer another call, call someone else, or speak privately to someone in your office. You can have multiple calls on hold at once. Take a call off hold to speak with the caller.

Putting a call on hold

1. Click *HOLD*. The *HOLD* button changes to *UNHOLD*. *Duration* resets to show the hold time. *Status* changes to *Holding*.

Alternatively, you can right-click the call in the *My Calls* area, and then select *Hold*. You can also double-click the call in the *My Calls* area.

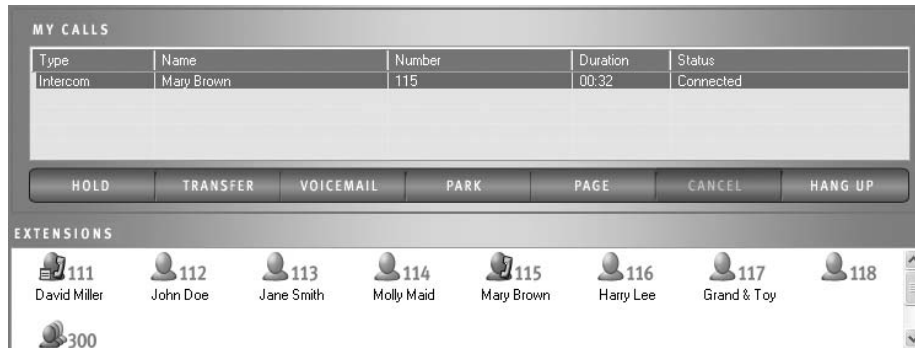
Taking a call off hold

1. If you have multiple calls on hold, select the call in the *My Calls* area.
2. Click **UNHOLD**. The **UNHOLD** button changes to **HOLD**. *Duration* returns to the connect time. *Status* changes to *Connected*.

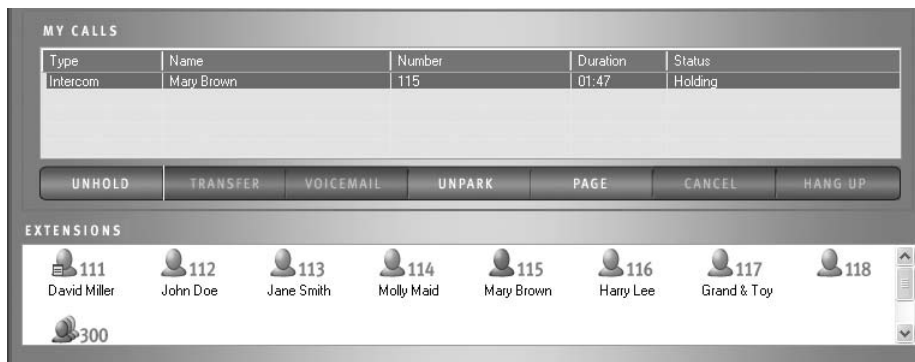
Alternatively, you can right-click the call in the *My Calls* area, and then select *UnHold*. You can also double-click the call in the *My Calls* area.

Example

David Miller is talking to Mary Brown. *Duration* shows the connect time. *Status* shows *Connected*.



David puts Mary on hold by clicking the **HOLD** button. The **HOLD** button changes to **UNHOLD**. *Duration* resets to show the hold time. *Status* changes to *Holding*.



David takes Mary off hold by clicking the **UNHOLD** button. The **UNHOLD** button changes to **HOLD**. *Duration* returns to the connect time. *Status* changes to *Connected*.

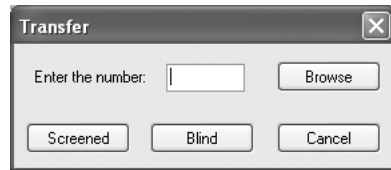
Transfer

You can transfer a call to another extension so the caller can speak to the user. You have two transfer options:

- **Screened transfer** — A screened transfer lets the user at another extension decide whether to take the call. If the other user does not want to take the call, tell the caller that the user is not available, and then suggest other options.
- **Blind transfer** — A blind transfer does not let the user at the other extension decide whether to take the call. If the other user is not available, the call is routed according to the configuration.

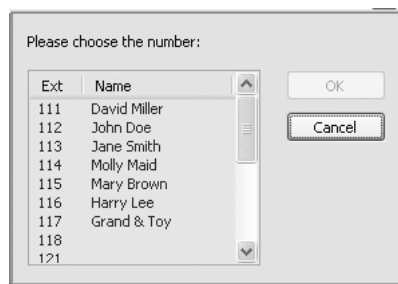
Transferring a call with a screened transfer

1. Ensure the other user is available by checking their extension icon in the *Extensions* area.
2. Click *TRANSFER*. The *Transfer* window appears.

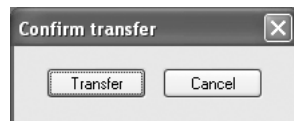


Alternatively, you can right-click the call in the *My Calls* area, and then select *Transfer*.

3. Specify the extension you want to transfer the call to. You can either:
 - Enter the extension number.
 - Click *Browse*, select the extension, and then click *OK*.



4. Click *Screened*. *Status* changes to *Holding*. The *CANCEL* button in the *My Calls* area is enabled. The other user's phone rings. The *Confirm transfer* window appears.



5. To cancel the screened transfer while the other user's phone is ringing, click the *CANCEL* button in the *My Calls* area.
6. When the other user answers, tell them who is calling, and then proceed as directed:
 - If the other user wants to take the call, click *Transfer*. You hear "Call Transferred", and the caller is connected to the other extension.
 - If the other user does not want to take the call, click *Cancel*. You are reconnected to the caller. After telling them that the user is not available, you can suggest other options.

Transferring a call with a blind transfer

1. Drag the call from the *My Calls* area onto an extension icon in the *Extensions* area. You hear "Call Transferred", and the caller is connected to the other extension. If the other user is not available, the call is routed according to the configuration. The call is removed from the *My Calls* area.

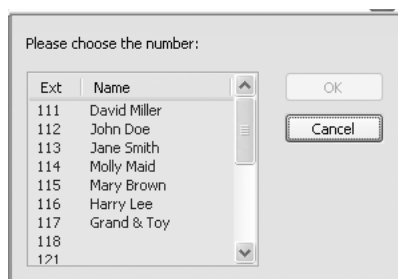
Alternatively, you can use the following procedure.

1. Click **TRANSFER**. The *Transfer* window appears.



You can also right-click the call in the *My Calls* area, and then select *Transfer*.

2. Specify the extension you want to transfer the call to. You can either:
 - Enter the extension number.
 - Click *Browse*, select the extension, and then click *OK*.



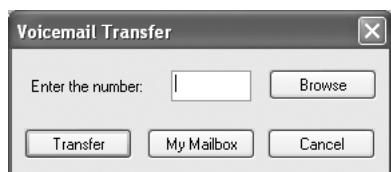
3. Click *Blind*. You hear “*Call Transferred*”, and the caller is connected to the other extension. If the other user is not available, the call is routed according to the configuration. The call is removed from the *My Calls* area.

Transfer to Voicemail

You can transfer a call to voicemail so the caller can hear an announcement or leave a message without disturbing the user. You can also transfer a call to your own voicemail so the caller can leave a message for you to check later.

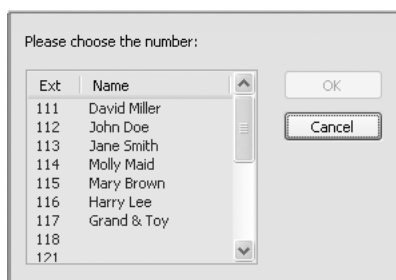
Transferring a call to voicemail

1. Click **VOICEMAIL**. The *Voicemail Transfer* window appears.



You can also right-click the call in the *My Calls* area, and then select *Voicemail*.

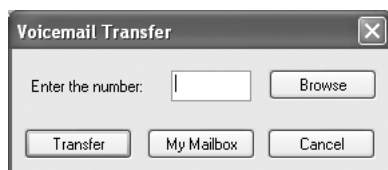
2. Specify the voicemail you want to transfer the call to. You can either:
 - Enter the voicemail number.
 - Click *Browse*, select the voicemail, and then click *OK*.



3. Click *Transfer*. You hear “*Call Transferred*”, and the caller is connected to voicemail. *Status* changes to *VoiceMail*. Once the caller hangs up, the call is removed from the *My Calls* area.

Transferring a call to your own voicemail

1. Click *VOICEMAIL*. The *Voicemail Transfer* window appears.



You can also right-click the call in the *My Calls* area, and then select *Voicemail*.

2. Leave *Enter the number* blank.
3. Click *My Mailbox*. You hear “*Call Transferred*”, and the caller is connected to your voicemail. *Status* changes to *VoiceMail*. Once the caller hangs up, the call is removed from the *My Calls* area.

Park/Unpark

You can park a call so a user can answer it from any local extension. Parking a call puts it on hold in a park orbit. The system has 10 park orbits: 500 to 509.

Parking a call

1. Select the call in the *My Calls* area. The *UNPARK* button changes to *PARK*.
2. Click *PARK*. The call is placed in the next available park orbit, and you hear “*Call parked at 50x*” (e.g. “*Call parked at 505*”). *Duration* is cleared. *Status* changes to “*Parked at 50x*”.
3. Page the user to let them know they have a call parked at 50x. See “[Page](#)” on page 28.

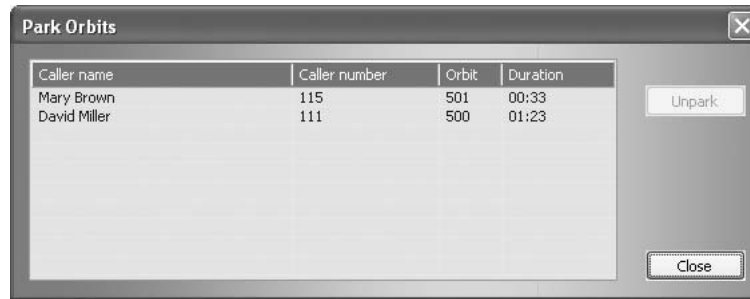
If the phone at the requested extension cannot receive a page, or you do not have overhead paging, either send a text message to the user, or physically tell them they have a call parked at 50x.

For example, if you park a call for Bob and hear “*Call parked at 505*”, use the Page function and say “*Bob, please pick up 505*”.

Answering a parked call

You can answer a parked call from any computer running the Console.

1. Click **UNPARK**. The *Park Orbits* window appears.



2. Select the call.
3. Click *Unpark*. The call appears in the *My Calls* area. *Duration* resets. *Status* is *Connected*. The call is removed from the *My Calls* area of the user who parked the call.

Answering a parked call using a local extension

You can answer a parked call from any local extension.

1. If the local extension has Direct Line Access enabled, press the *Flash* button.
2. Press ****** and then press the park orbit number (500 to 509).

For example, Bob hears the page saying "*Bob, please pick up 505*". Using any local extension, he presses ****505**. The caller is connected to Bob at that extension.

Page

You have three options for paging:

- Ring group — Paging an extension ring group (i.e. group paging) causes all the phones in the extension ring group to automatically answer in speaker mode to receive the page. The phones answer in one-way audio mode to sound the announcement, but do not permit the users to reply.
- For this option to work, the phones in the extension ring group must support group paging.
- Intercom — Paging an intercom causes the user's phone at the extension to automatically answer in speaker mode to receive the page. The phone answers in two-way audio mode to sound the announcement, and permits the user to reply.
- For this option to work, the phone at the extension must support intercom paging.
- Overhead — Overhead paging connects you to an overhead public address system. For this option to work, the phone system must be connected to an overhead public address system.

Paging an extension ring group

1. Click *PAGE*. The *Page* window appears.



2. Select the *Ring group* option.
3. Enter the extension ring group number, or click *Browse* to select an extension ring group from the list.
4. Click *Page*. The *After Page* window appears.



5. Pick up your handset and make your announcement.
6. Click *Hangup* to end the page.

Paging an intercom

1. Click *PAGE*. The *Page* window appears.
2. Select the *Intercom* option.
3. Enter the user's extension number, or click *Browse* to select an extension from the list.
4. Click *Page*. The *After Page* window appears.
5. Pick up your handset and make your announcement.
6. Click *Hangup* to end the page.

Paging with an overhead public address system

1. Click *PAGE*. The *Page* window appears.
2. Select the *Overhead* option.
3. Click *Page*. The *After Page* window appears.
4. Pick up your handset and make your announcement.
5. Click *Hangup* to end the page.

Cancel

You can cancel a screened transfer while the other user's phone is ringing. See [“Transferring a call with a screened transfer” on page 25](#).

Canceling a screened transfer

1. After clicking *Screened*, but before the other user answers their phone, click *CANCEL*.

Hang Up

You can hang up a call when *Status* is *Connected* or *Ringing*.

Hanging up a call

1. Select the call in the *My Calls* area.
2. Click *HANG UP*. The call ends.

Redirect

If another extension is receiving a call, its extension icon will flash red. If you know the other user isn't available, you can redirect the call to your extension.

If a local extension is receiving a call, its extension icon will flash red. If an extension ring group is receiving a call, all the extension icons of its local extensions will flash red. However the extension icon of the extension ring group itself will not flash.

Redirecting a call

1. Right-click the extension icon that is flashing red, and then select *Redirect*. The call will be transferred to your extension.

Chat

The Chat feature provides instant text messaging between users running the Console. It can be used to confirm the availability of a recipient before transferring calls, exchanging essential information, sending and receiving links, and an endless variety of other purposes. Chat is your private channel to manage your calls and callers.

You are automatically made available for chat when you start the Console. However you can indicate that you are not available for chat if you don't want to be disturbed.

If you are available for chat, a note icon appears on your extension icon in the *Extensions* area. If you are unavailable, the note icon is removed from your extension icon.

You can only chat with a user at a local extension, not with a user at a remote extension or extension ring group.

In the following examples, David Miller (111) and Mary Brown (115) are available for chat, and David will send Mary a message. The other users are unavailable for chat.



Indicating that you are not available for chat

1. Right-click your extension icon, and then select *Unavailable for chat*. The note icon is removed from your extension icon, as shown below, and other users will not be able to send you text messages.



Alternatively, you can choose *Chat > Unavailable for chat*.

Indicating that you are available for chat

1. Right-click your extension icon, and then select *Available for chat*. The note icon is added to your extension icon, as shown below, and other users can send you text messages.



Alternatively, you can choose *Chat > Available for chat*.

Sending a text message

1. Right-click the other user's extension icon in the *Extensions* area, and then select *Chat*. The *Talking to* window appears.



2. Type your message into the lower text box.

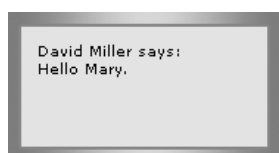


You can also copy text and/or hyperlinks from other applications and paste them into the chat window.

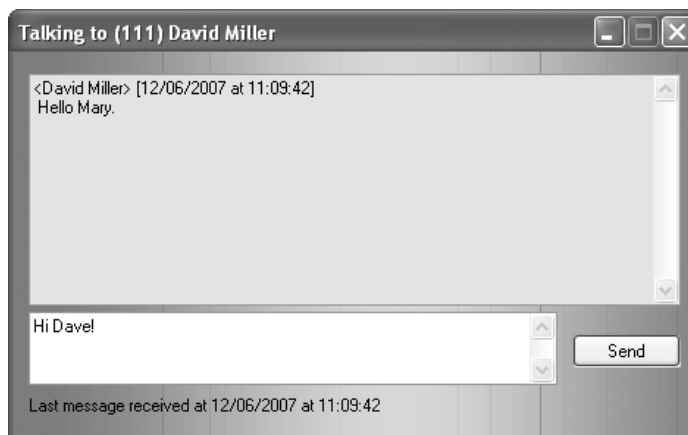
3. Press *Enter* or click *Send*. Your message moves to the upper text box. The upper text box will show all messages sent by both users.



Depending on the other user's client preferences, a pop-up notification appears on their screen, and a tone sounds on their computer.



4. The other user clicks the pop-up notification or the *Talking To* icon in the task bar. Their *Talking to* window appears, and they can type and send a response.



Call

The Call feature allows users running the Console to call each other, even if they are not available to chat.

You can call a local extension, remote extension, ring group, or a phonebook entry.

Calling another user

1. Right-click the other user's extension icon in the *Extensions* area, and then select *Call*. The extension you are calling and your extension enter intercom mode, and both extensions ring. Alternatively, you can click and drag the other user's extension icon to the *My Calls* area.

Calling a phonebook entry

1. Double-click on the phonebook entry in the *Phonebook* area. Your extensions will ring, upon picking up the system will dial the number and connect you through.

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