Anywhere365

Anywhere365 Attendant for Teams

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Anywhere365

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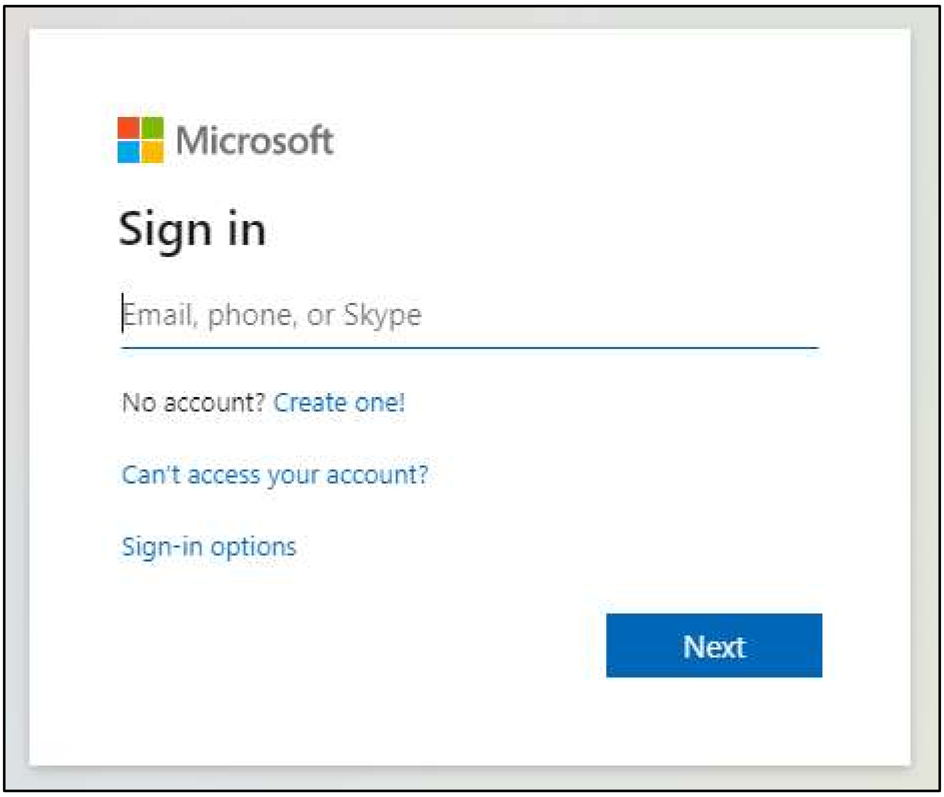
2 Note to the reader

This user manual is aimed at users of the Attendant. The images and screenshots in this document are made to illustrate the described functionality. Because of this, some details might be intentionally left out. Depending on the version, available features and configuration, the actual application might differ from the screenshots.

3 Signing in to Attendant Console

To sign in to Attendant Console, point your browser to URL provided by your system administrator, you will be redirected to a login page. Here you can sign in with your Microsoft Teams account.

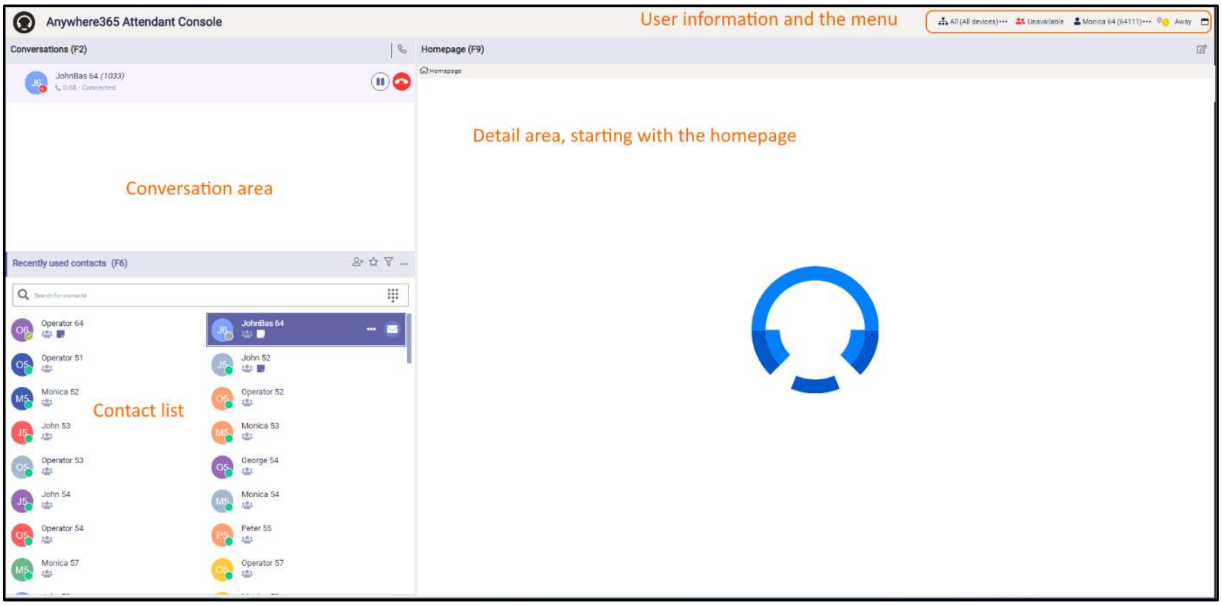


After a successful sign in, you will be forwarded to the Attendant.

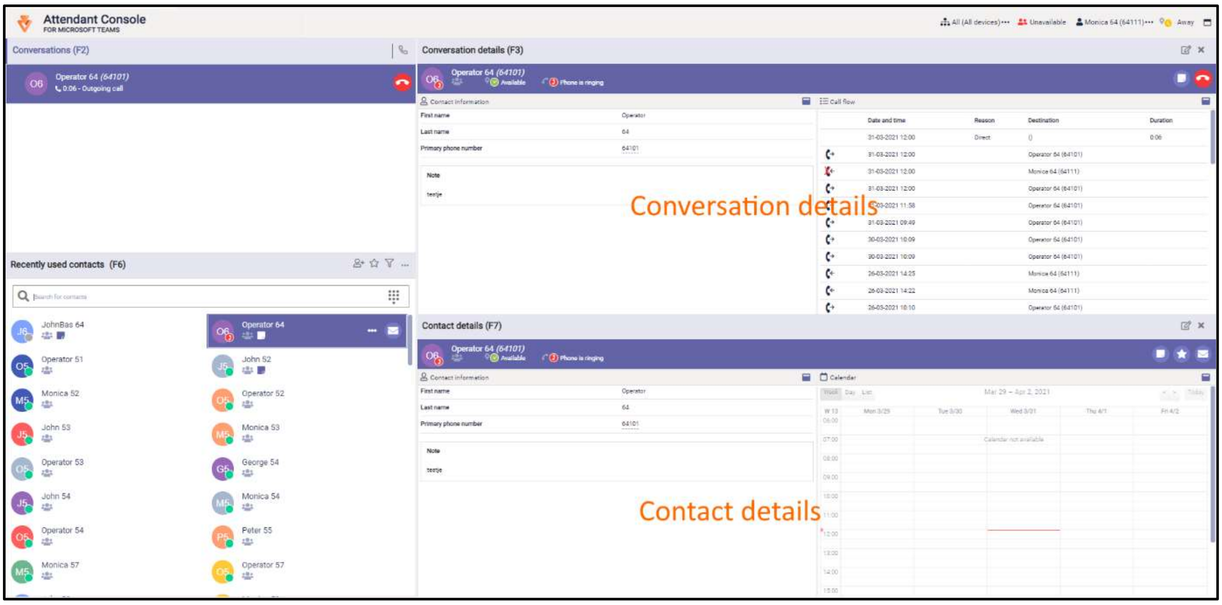
Note: Depending on your environment and previous logins, the Sign in procedure might take place automatically, and you could be forwarded to the Attendant Console immediately.

4 The Attendant main screen

Once you have signed in, you will see the Attendant screen. The figure below explains the different areas:



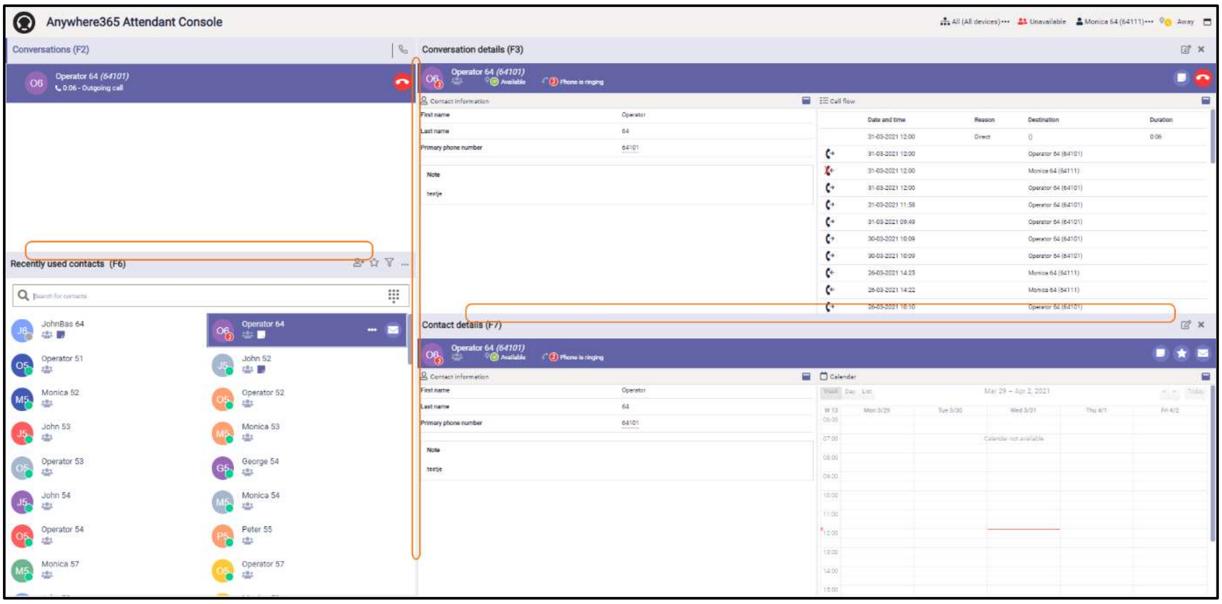
When you click on a conversation in F2, the details of that conversation will be shown in the F3 screen (Conversation details). Clicking on the 'X' will close this screen.
When you click on a contact in the contact list (F6), the details of that contact will be shown in the F7 screen (Contact details). Clicking on the 'X' will close this screen.



Note that call functionality will be explained in chapter 'Basic call functionality' later in this document.

4.1 Resizing the panels

You can resize each panel to the desired size by dragging the ‘splitters’ (marked orange below):



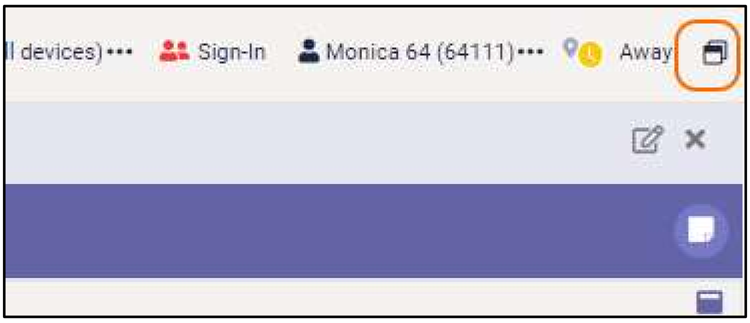
When the panels F2, F3, F6 or F7 have been made so small, that the buttons don't have sufficient space, the buttons will have a drop-down menu. To see the other buttons, click on the drop-down menu.

The positions of the splitters will be remembered between sessions.
The settings are stored on the Anywhere365 server, so you will have the settings available on other devices as well.

4.2 Full screen mode

The menu bar contains a button for making the Attendant full screen:

When the full screen mode is on, you can restore the screen to its original size with the restore button:



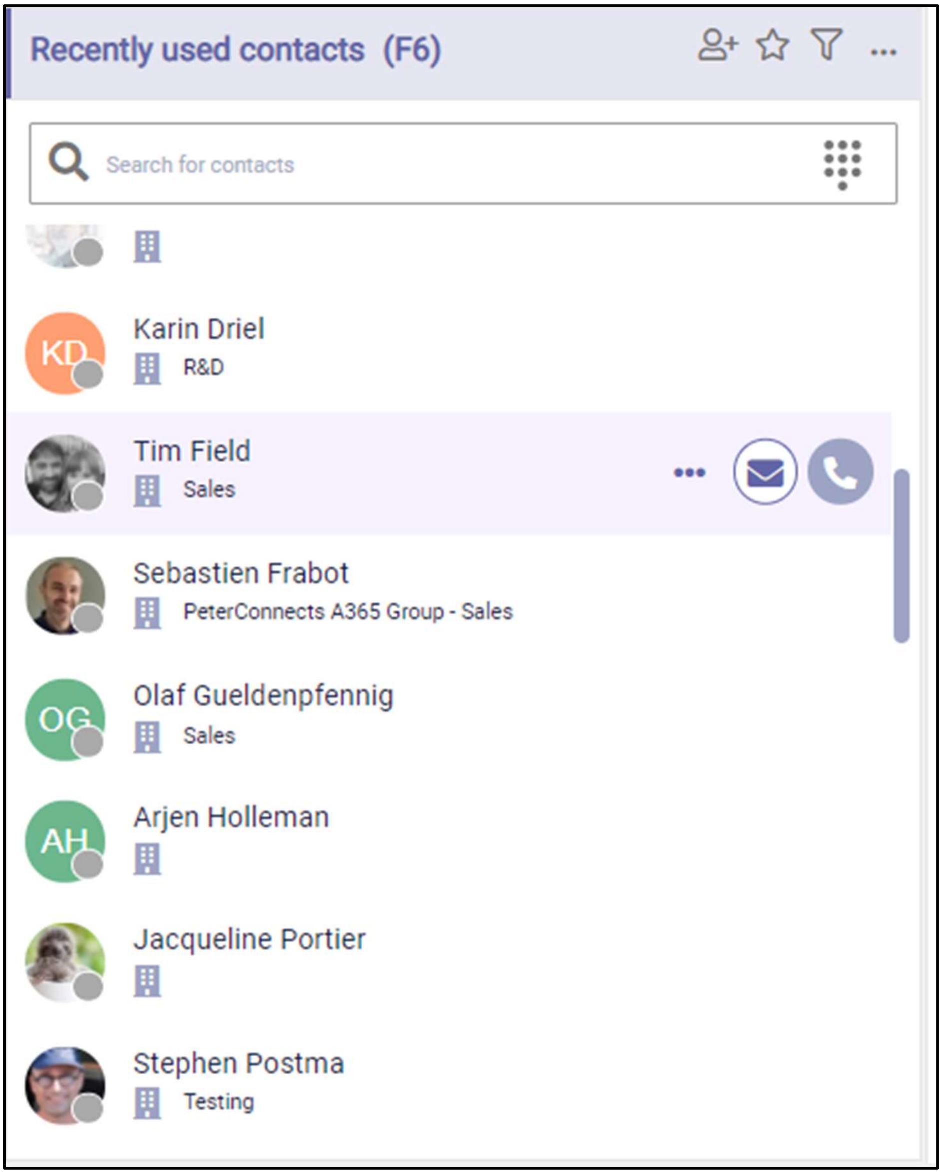
5 The contact list

In the contact list you can search for contacts, filter contacts and perform actions on the contacts that you have found.

5.1 View modes in the contact list

5.1.1 Default mode: Recently used contacts

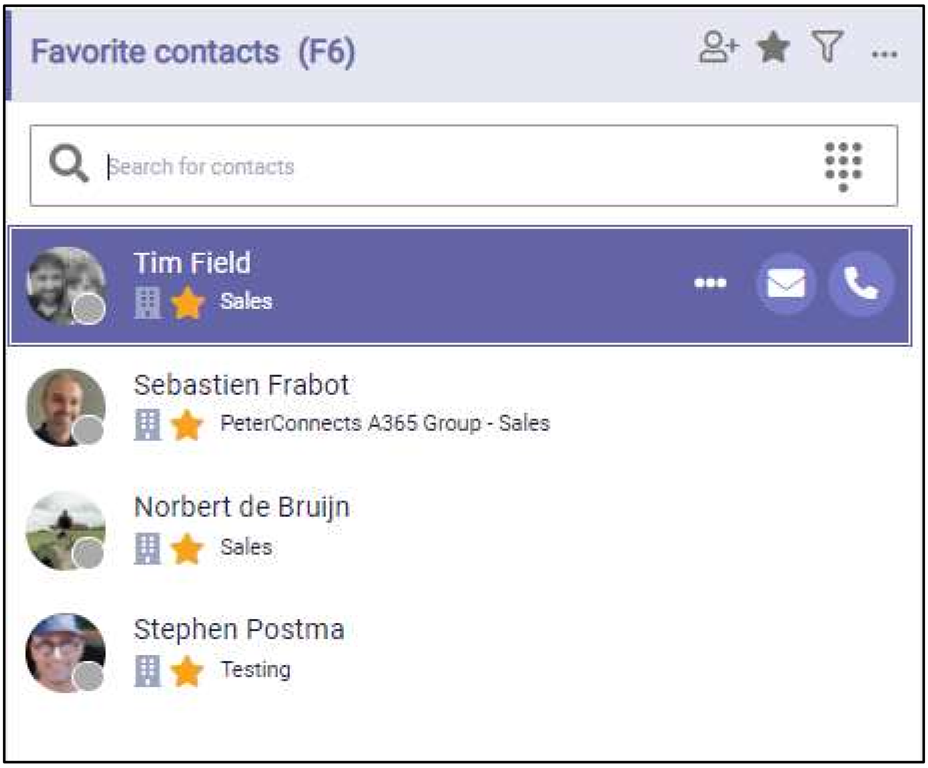
By default the contact list will show the most recently used contacts. When a contact is used (i.e. a call has been made to that contact and that call has ended, or a transfer to that contact has been done, or a mail has been sent to that contact, or a contact note has been saved for that contact) the contact is moved to the top position of the contact list.



5.1.2 Favorites mode

When you click on the star icon in the title bar of the contact list, you will switch to the favorites mode. In this mode, you only see the contacts that you marked as favorite.

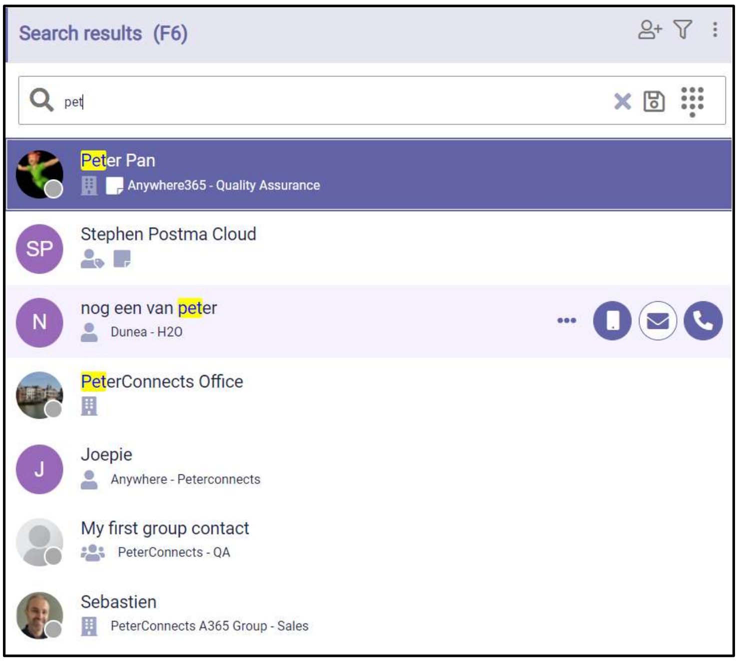
For information about adding, removing and sorting favorites, see paragraph “Favorites”.



5.1.3 Search mode

Whenever you type in a search term in the search box, or when you filter your contacts via the filter menu, the contact list will switch automatically to the search mode. In that mode the contact list will only show contacts that match your search query or your filter.

Tip: when search has completed, pressing ENTER will dial the top-most search result.



When you turn off the filter and clear the search box, the contact list will return to the previous mode.

5.1.4 Title bar text depending on the mode

The title bar will show in text which mode you currently are working in:

When no filter is on and favorites are not set, the recently used contacts are shown, with the most recently used ones on top of the list:

When the 'Show favorites' button has been clicked, the favorite contacts are shown:

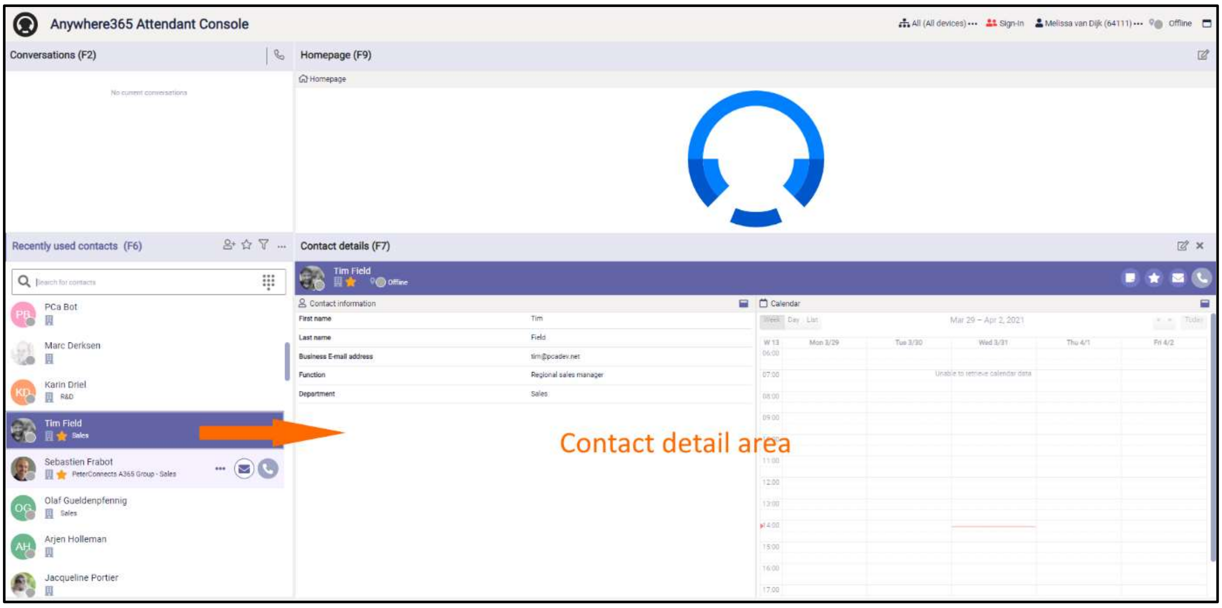
When a filter has been set, the filtered contacts are shown:

This title is shown, when you are searching for a contact, while a filter has been set:

This title is shown, when you are searching for a contact, while no filter has been set:

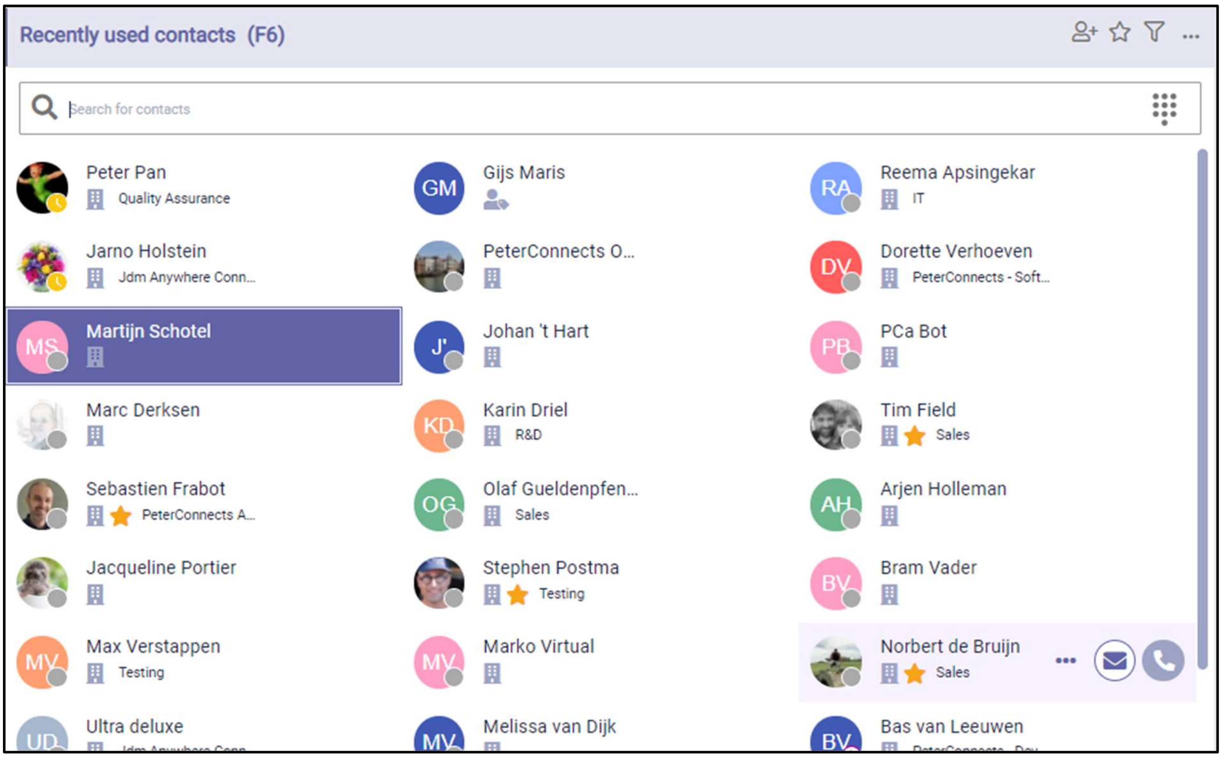
5.2 Viewing the details of a contact

Click on any contact to see the contact details in the right screen.



5.3 Multiple columns

The contact list supports multiple columns. When you drag the border of the contact list and increase the width, more columns will be displayed.



5.4 Contact types

Contacts are categorized by their type, and this is indicated by the following icons:

Personal contact. This contact is only visible to you.

Shared contact. This contact is a contact created manually, that is visible for all persons..

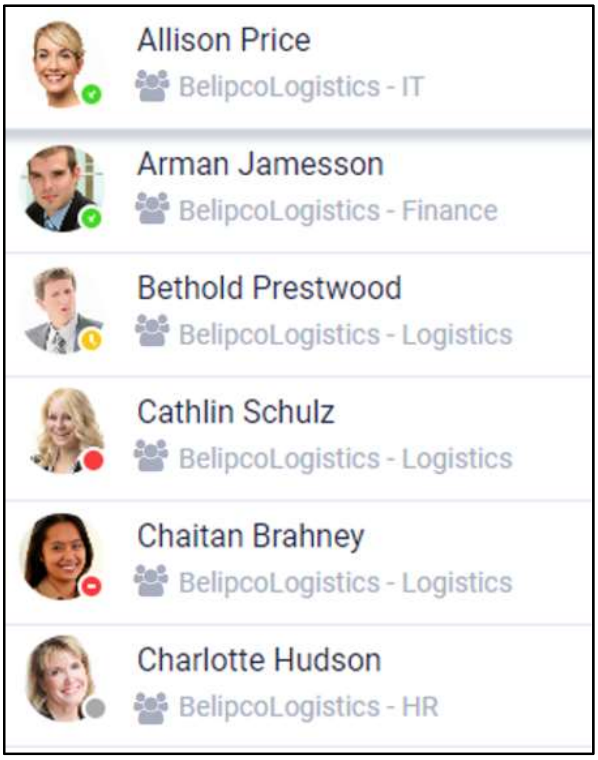
Corporate contact. This contact is available for all users in the company.

Queue. This is not a real contact, but a queue to which you can transfer calls.

External contact.

5.5 Presence

When the application is configured to show a contact's presence state, then the contact list might look like this:



Depending on the type of telephony system your company uses, the presence state may appear slightly differently. The colors however will remain the same. They are:

Green:	Available
Red:	Busy or Do Not Disturb
Orange:	Away
Grey:	Offline or unknown state

Hovering over the presence state indicator with your pointer will show the presence state in text. The presence state is also shown in Conversation details panel (F3) and in the Contact details panel (F7), see the next paragraph.

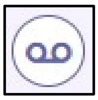
5.6 Actions in the contact list

When you hover over or select a contact, you have the following actions available:

Call the contact.

Send a mail to the contact.

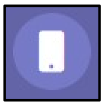
Transfer the current call to the contact (only available when you have a current (connected) call).



Transfer the current call to somebody’s voicemail (only available when you have a current (connected) call).

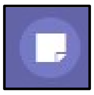
Add or edit the note for the selected contact

Add the selected contact to or remove the selected contact from your list of favorites



Call the mobile number of the contact (only available when the contact has a mobile phone number)

Call the primary number of the contact (only available when the contact has a primary number)

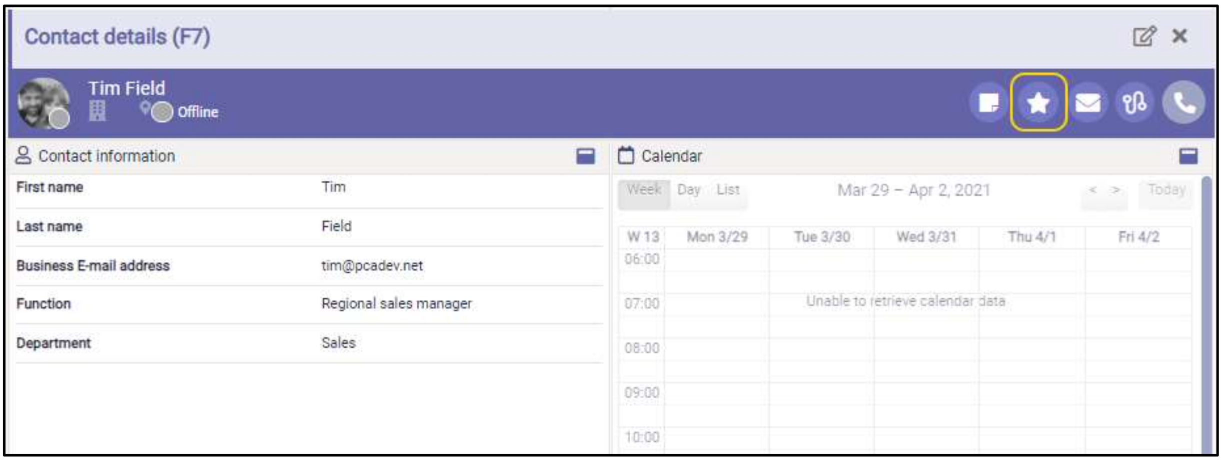
In F6, the buttons "Edit Contact Note"  and "Add to Favorites"  are in the drop-down menu.

When the F6 list is smaller, other buttons will move to the drop-down as well:

5.7 Managing your favorites

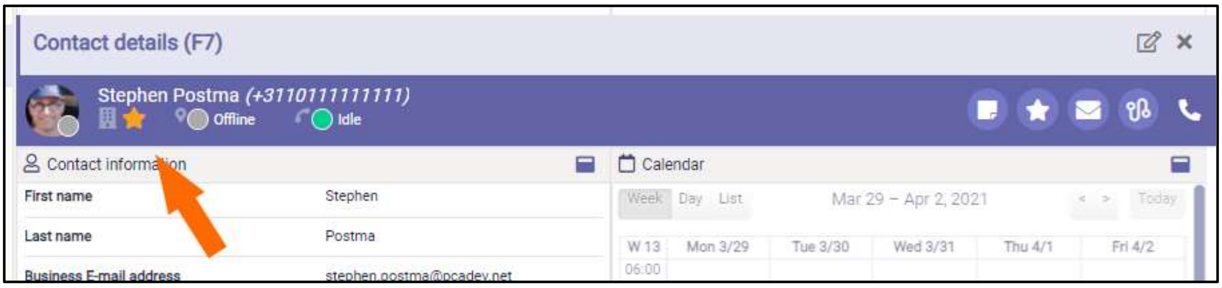
5.7.1 Adding a favorite

You can mark a contact as favorite by clicking on the star in the contact detail area:



You can also use the favorites button in the contacts list (F6)

When the contact has been marked as favorite, a star will change color and become visible:

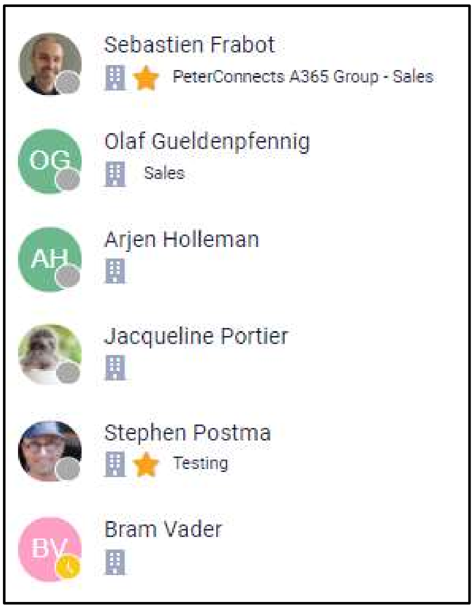


5.7.2 Removing a favorite

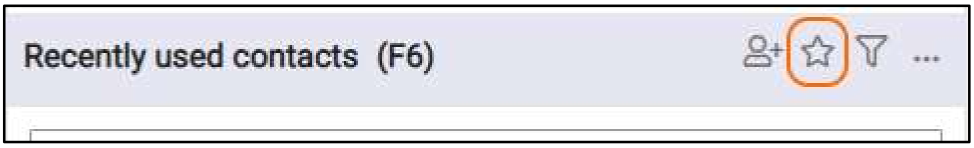
You can click on the 'Remove from favorites' button again, to remove the contact from your favorites.

5.7.3 Displaying favorites

The contact list indicates your favorites with a star:

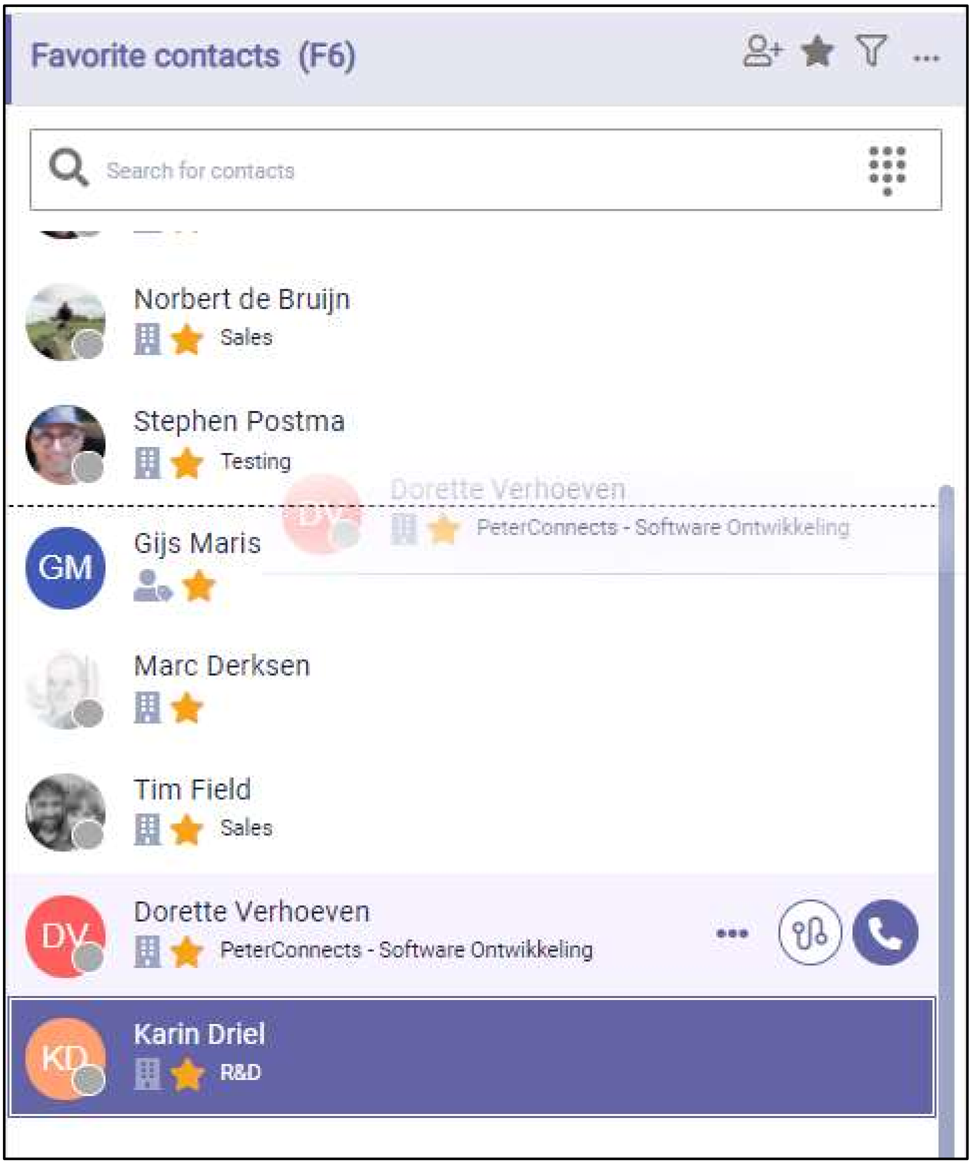


To view all your favorites, you can switch to the 'favorite mode' by clicking on the star in the title bar:

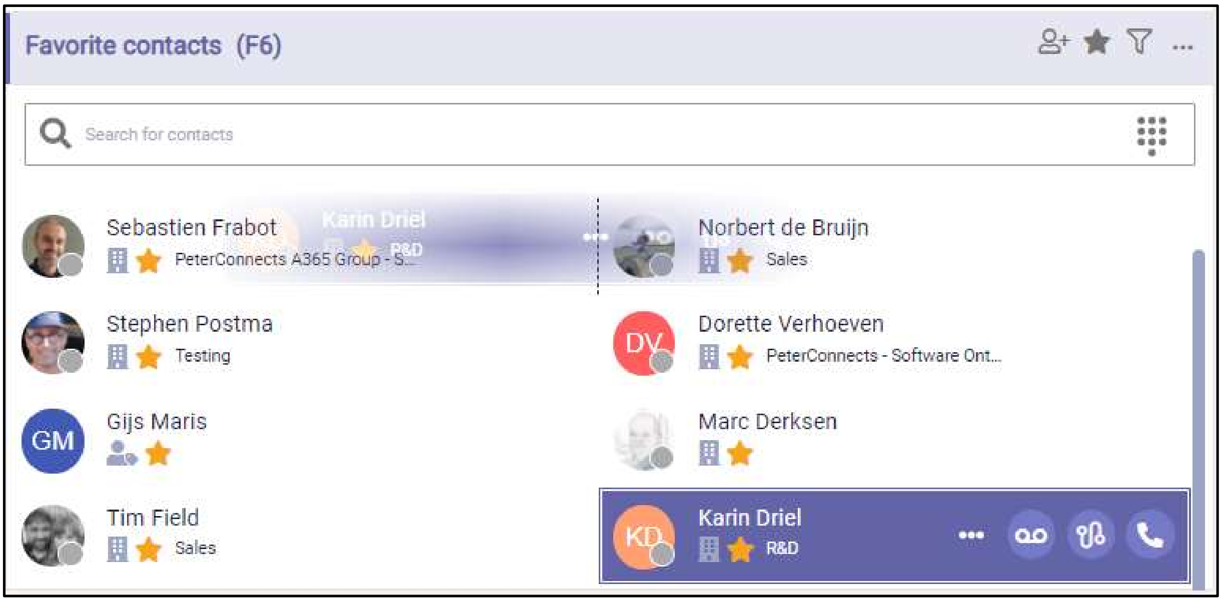


5.7.4 Sorting favorites

When you are in the favorites mode, you can arrange your favorites by dragging and dropping a contact from one place to another. The dashed line indicates the place where your favorite will be moved.



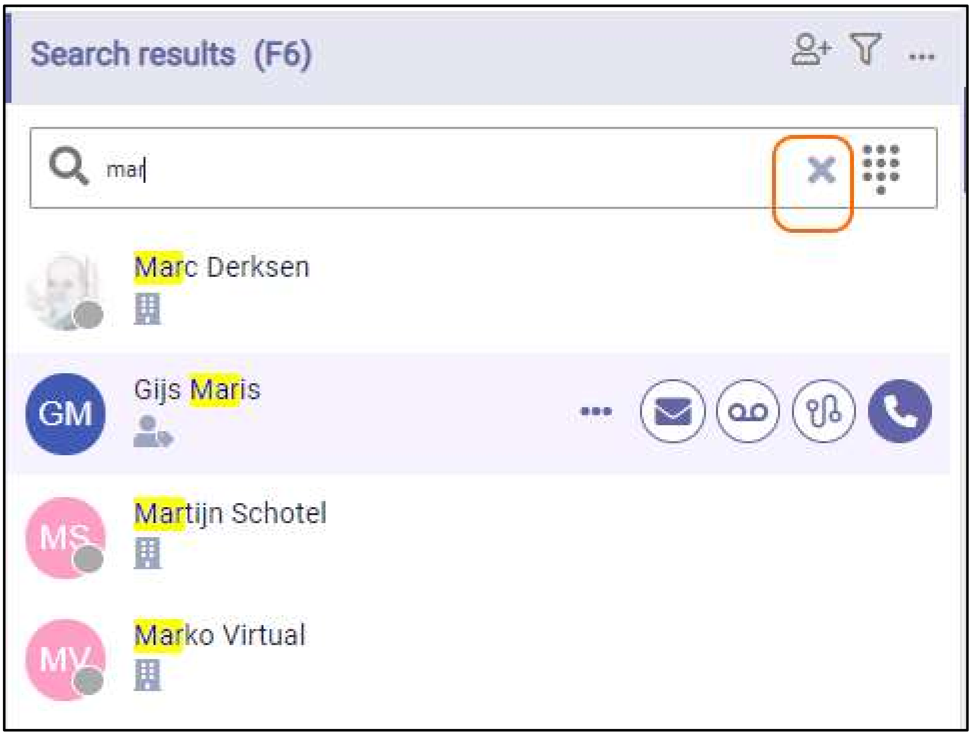
When there are multiple columns in the contact list, the dashed line will appear to the left or right side of the contacts, depending on whether you hover over the left or right part of a contact:



5.8 Searching and filtering

5.8.1 Searching a contact

You can start typing to enter text in the search box to search in the contact list (you do not have to click into the Search field first). Your search text will be highlighted in the search results:



Select X in the search box or press “Escape” to clear the search text.

All fields that you see in the contact information are searchable in the search box in F6.

Note: It is not possible to search on text that is not at the beginning of a word. For example, if a name is 'Elliot', it is possible to search on Ell', but not on 'iot'. When a name is 'Van Halen', it is possible to search on 'Hal'.

5.8.1.1 Search results

The contact list search results will be sorted based on the field in which the search term is found. From most important to less important the order is:

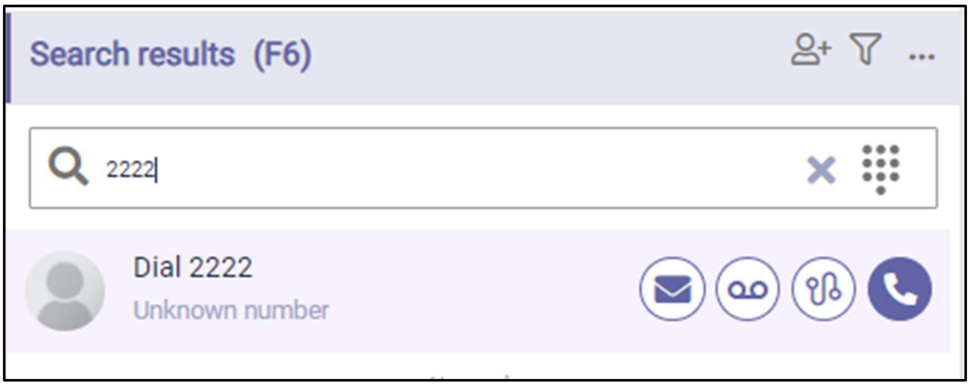
1. firstname
2. displayname and lastname
3. email
4. department
5. function
6. other fields.

This order of this list indicates the weighting of the search. If the searchtext is found in the same field then it will get more priority if it is an exact match. So when searching for "Rob" a person with firstname "Rob" will be shown first and a person with firstname "Robert" will be shown later. If the field and whether it is an exact match or not are equal then the favorites are shown first followed by the most recently used.

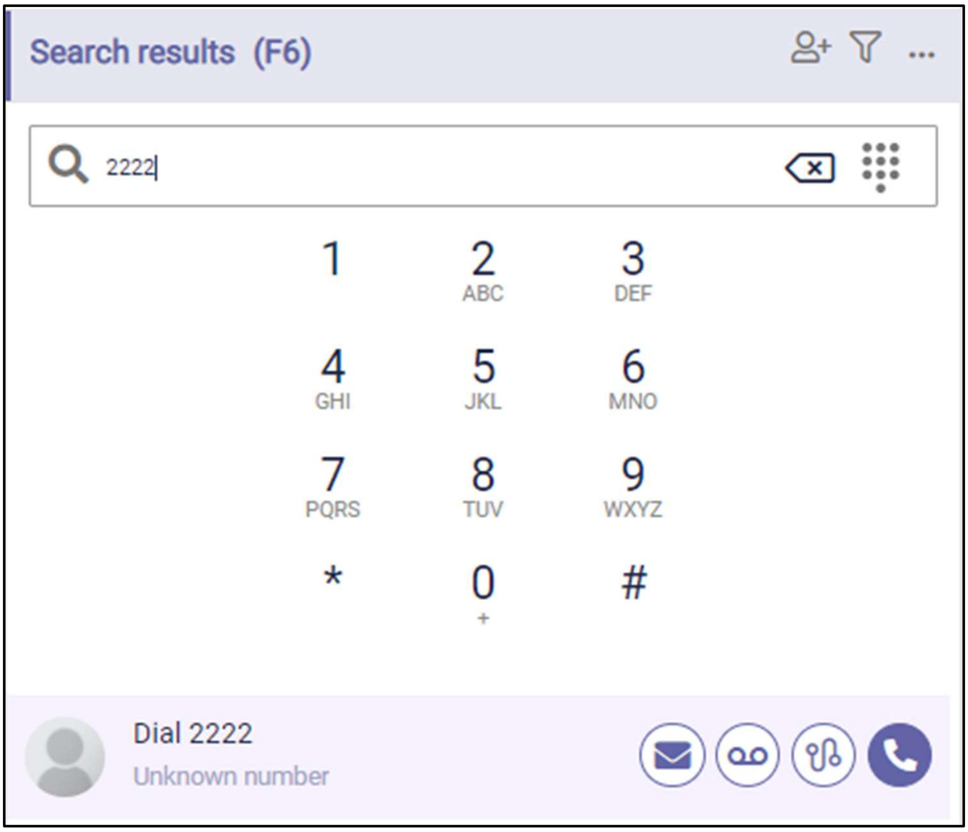
Note: A contact's displayname is defined in the User management of Microsoft 365 admin center.
When the result limit is reached, not all matching contacts are displayed. In such a case, enter a more precise search term to refine your search to find a specific contact.

5.8.1.2 Searching for a number

You can also search for a number. When the number is not found, you can still dial that number:

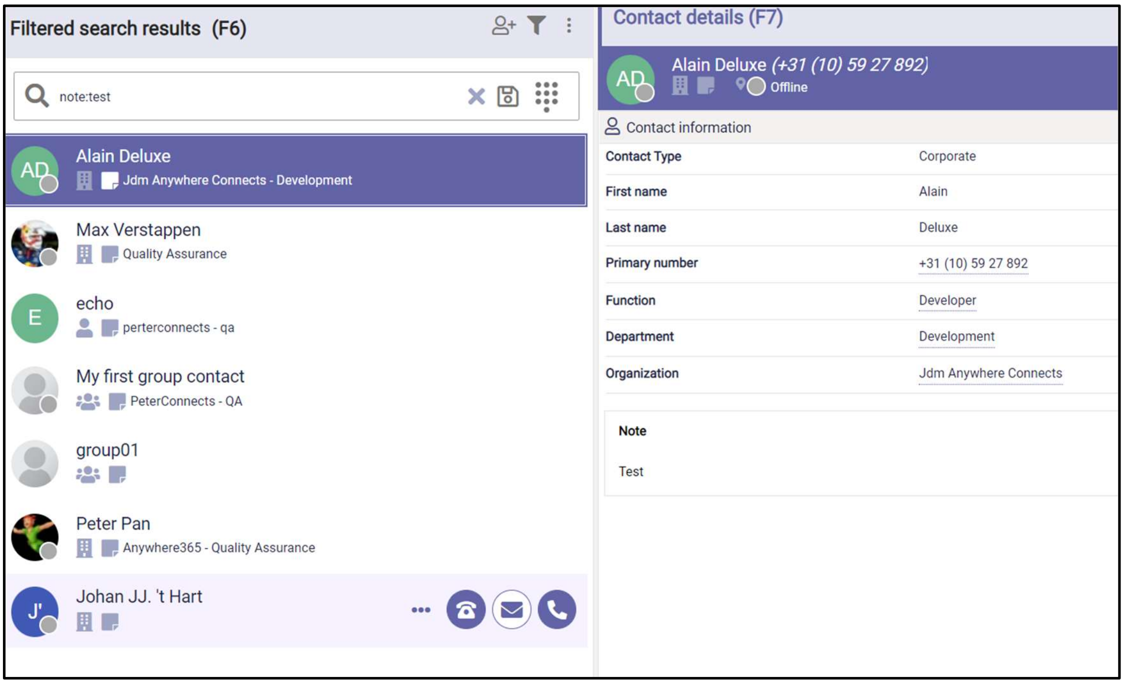


Instead of typing the numbers, you can also use the dial pad. You can toggle the dial pad on and off by selecting the dial pad .



5.8.1.3 Searching contact notes

The contact notes can be searched now. You can do a specific search on with the prefix "note:" or a note specific search without the prefix.



So when searching with a search term like "note:test", it will match contacts that have a contact note with a word that starts with (or equals to) "test".

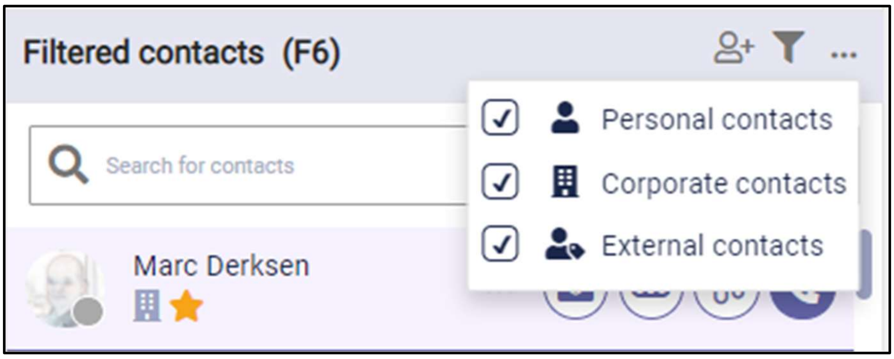
When searching with a search term like "test" it will match the same contacts plus the contacts that have any other field with a word that matches "test".

A match on contact note will have the lowest priority so it is displayed at the bottom.

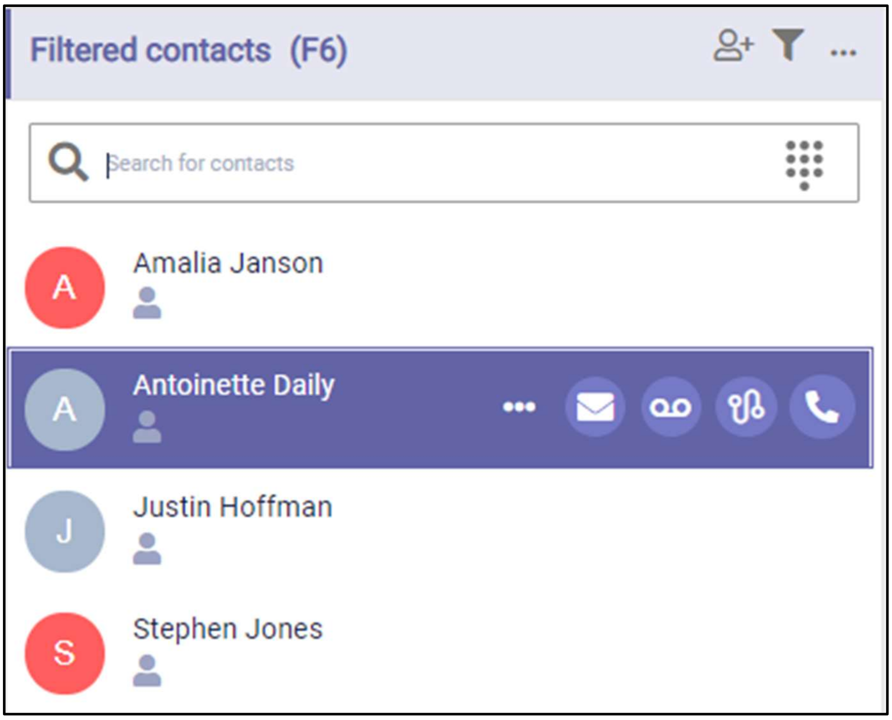
5.8.2 Filtering contacts from the filter menu

You can filter the contact list to narrow down the number of contacts you see. Via the filter settings, you can select which contacts you want to see.

You can select which type of contacts you want to see.



For example, you can select 'Personal contacts' to display only your personal contacts:



When you select one of the filter options, it is applied immediately and will remain active until you select the 'Filter contacts' button once again.

If you reselect 'Filter contacts' button, the last used filter options will be reapplied to your contact list.

When the 'Filter Contacts' icon is solid, the filter is active: 

When the 'Filter Contacts' icon is outlined, the filter is inactive: 

Your filter settings will be saved between sessions.

5.8.3 Saving search queries

In the Attendant you can save your search queries so you can use them later on. The saved search queries actually are a combination of a filter and/or a search string.

5.8.3.1 Saving a search query

You can create a filter, whenever you are filtering and/or searching, for example when you are filtering on "Personal contacts" and you want all contacts that have "mon" in the name:

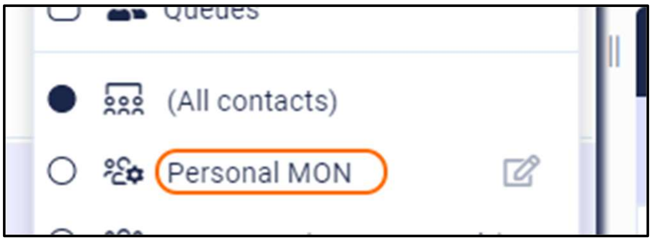
When you want to save this query, you can click on the “save” button in the search bar:

Note: The save button can be disabled, if you have reached the maximum number of saved queries. In that case, you have to delete a saved search query first.

When you click on the save button, a popup will be shown, where you can give your saved query a name:

In the popup, you can also see the Advanced Search text, that is used to list these contacts. (For more information about the Advanced Search syntax, see the paragraph about Advanced Search later on in this chapter).

Then click on button “Save”, to finalize your search query. If you open your filter drop down, you will see that your search query has been saved. Right below the contact types, you will see a section that contains your saved search queries:



When you click on a saved search query, the contact list will show only the contacts that apply to that query. When you click on "(All contacts)", the filter will be cleared and you will see all contacts again.

5.8.3.2 *Editing a saved search query*

You can change the name of a saved search query by clicking on the edit icon. Then the popup will appear, where you can enter a new name.

5.8.3.3 *Deleting a saved search query*

You can delete a saved search query by clicking on the edit icon. Then the popup will appear. Click on the trashcan button to remove the name. A question will be shown if you want to delete the item, with two buttons "Yes" and "No". Click "Yes" to delete the item or click "No" to get back to editing the item.

5.8.4 Advanced search

The Attendant supports advanced search. This means that you can build your own search string that also includes filter options.

5.8.4.1 *Syntax*

A search string contains keys and values. A key-value pair looks like this:

```
key:values
```

for example:

```
source:Personal,Corporate
```

In the example above, the search will be limited by only Personal and Corporate contacts.

A key-value pair of values cannot contain spaces, commas or a colon. If you need it to contain those, then the values need to be included in a set of quotes. For example:

```
key:"value 1","value:2"
```

5.8.4.2 *Overview of keys and values*

<no key>	All values in the string that are not preceded by a key will be used as a search term. For example:
	`dav`
	will look for contacts that contain the word "dav" in either the first name, last name or some other fields. Another example:
	`dav bow`
	will look for all contacts that contain either the word "dav" and the word "bow" in the first name, last name, or some other fields.

Source	This will limit the search to the specified sources. For example `source:personal` will look for all personal contacts. The various sources are: - Personal - Corporate - External

A combination of keys and values can be used for searching. For example:

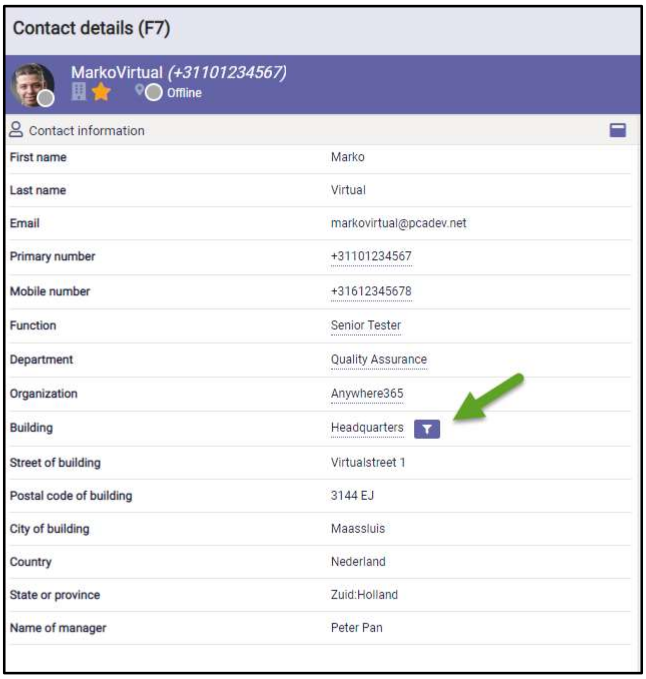
```
dav source:personal
```

looks for all personal contacts and ‘dav’ in either the first name, last name or some other fields.

It is possible to search the other contact details fields as well, the following fields are searchable:

Contact details field name	Example	Azure AD field name
First name	`FirstName:dav`	First name
Last name	`LastName:dav`	Last name
Email	`Email:dav@dav.com`	Email
Primary number	`Phone:123`	Office phone
Mobile number	`MobilePhone:123`	Mobile phone
Function	`Function:dev`	Job title
Department	`Department:sales`	Department
Organization	`Organization:dev`	Company name
Building	`Building:dav`	Office
Street of building	`BuildingStreet:dav`	Street address
Postal code of building	`BuildingPostalCode:123`	ZIP or postal code
City of building	`BuildingCity:dav`	City
Country	`BuildingCountry:dav`	Country or region
State or province	`BuildingState:dav`	State or province
Name of manager	`Manager:dav`	Manager

For some fields in the contact details, a clickable filter icon appears next to the value, which inserts it as a search term, making it easy to find more contacts of the same kind:



Following fields show this clickable filter icon:

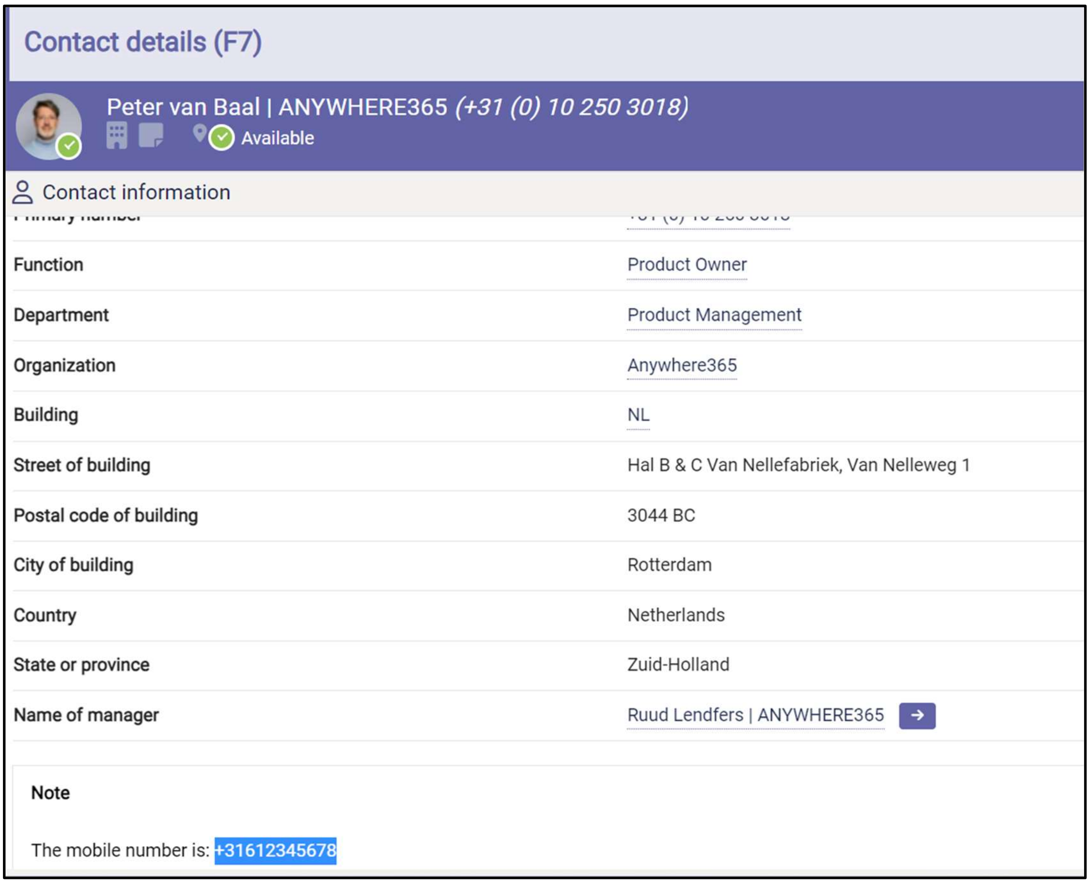
- Function
- Department
- Organization
- Building

5.8.5 Copy contact information

The Attendant Console provides functionality for easy copying contact information. Most of the contact fields present a button when hovering over it. By clicking on this button the information in the field will be copied.

5.8.5.1 Copy information from the Notes

Often the additional Notes contain information, like telephone numbers that need to be copied. Copying this information is done by selecting the information that need to be copied and automatically it will copy the information.



5.9 Editing contacts

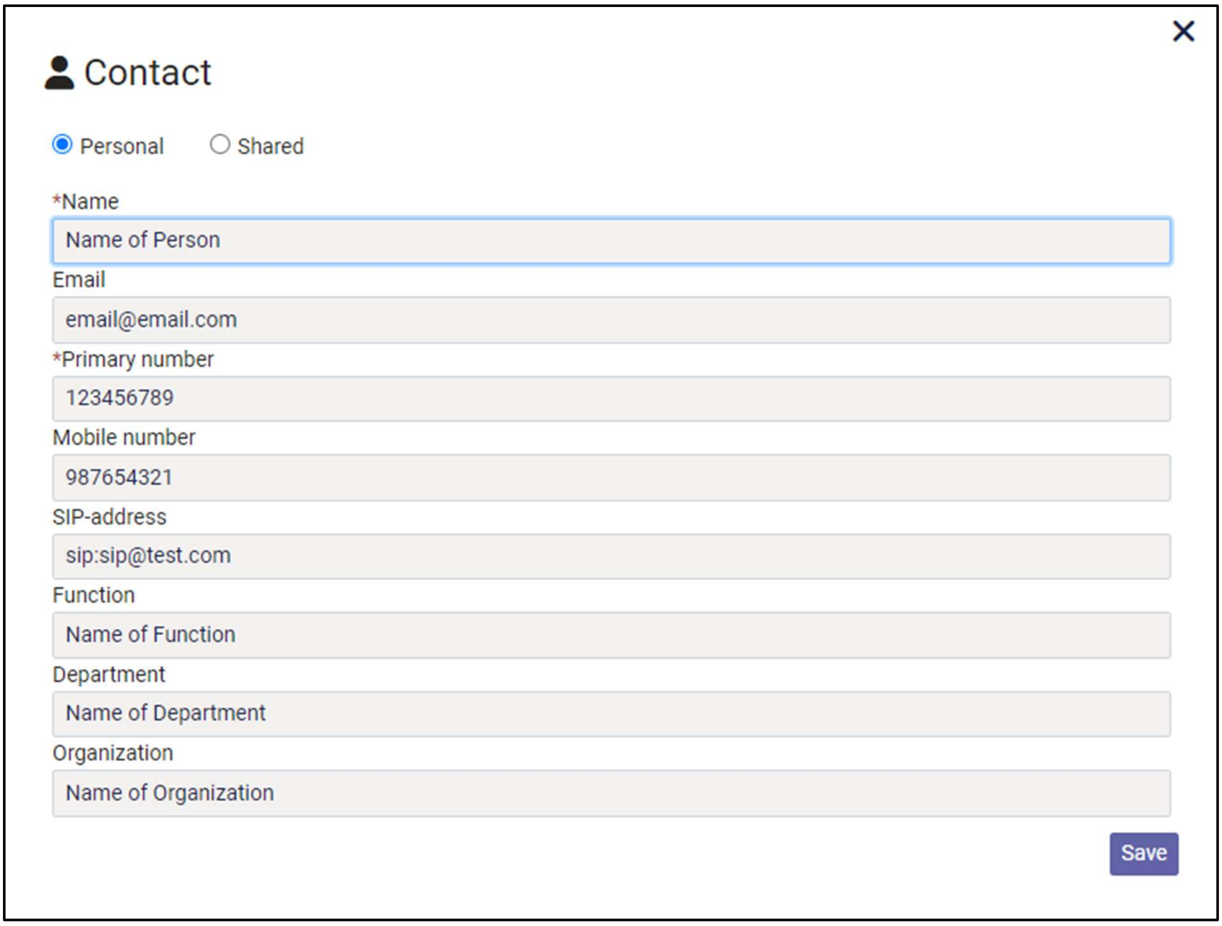
5.9.1 Adding a contact

You can add personal contacts to the contact list. The steps are:

1. Click on the ‘Add contact’ button in the title bar of F6:

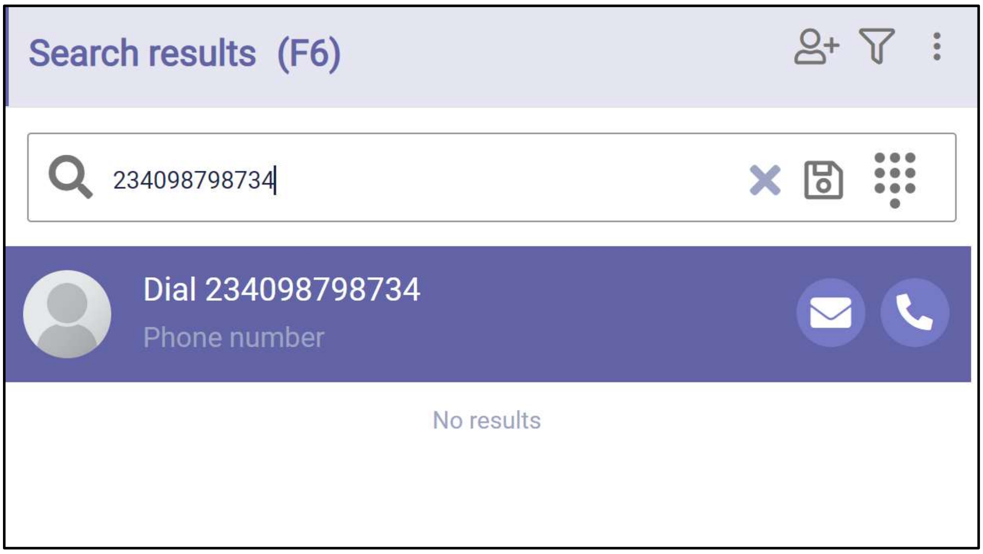
2. Now, a pop-up appears in which you can enter the data of the new contact. Click on the ‘Save’ button to save the new contact. Click on ‘X’ to cancel.

   Note that the fields in the image might differ depending on your edition of the Attendant.



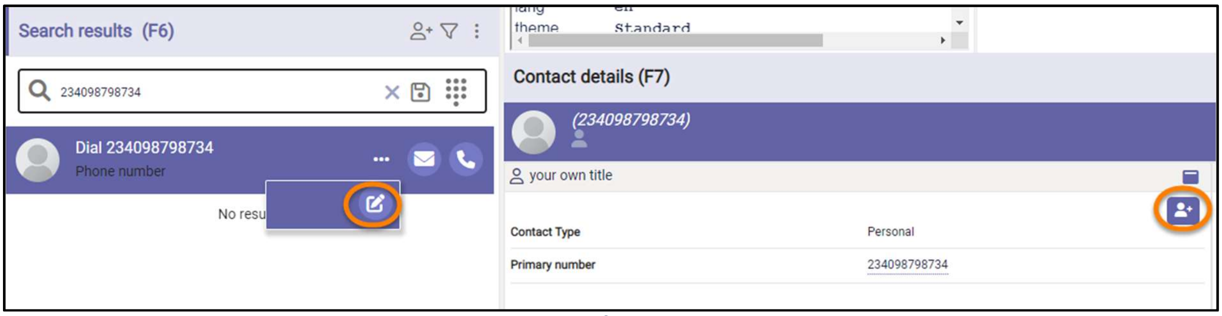
Another way to add a contact is:

1. Search for a number in the search box of the contact list.



2. Click on the 'unknown number' contact in F6. Then in the Contact Detail panel, you will see a button "Add" in the contact information widget. Click on that button.

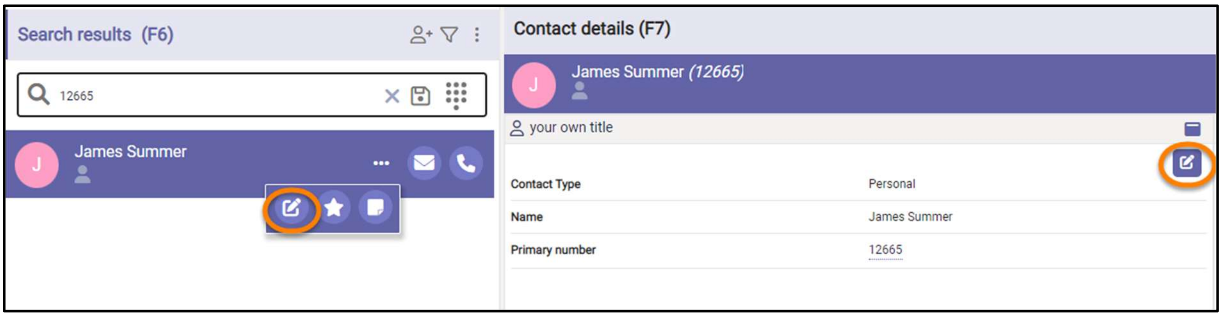
You can also use the button in F6 to add the contact.



3. Then the contact pop-up appears, see at the beginning of this paragraph.

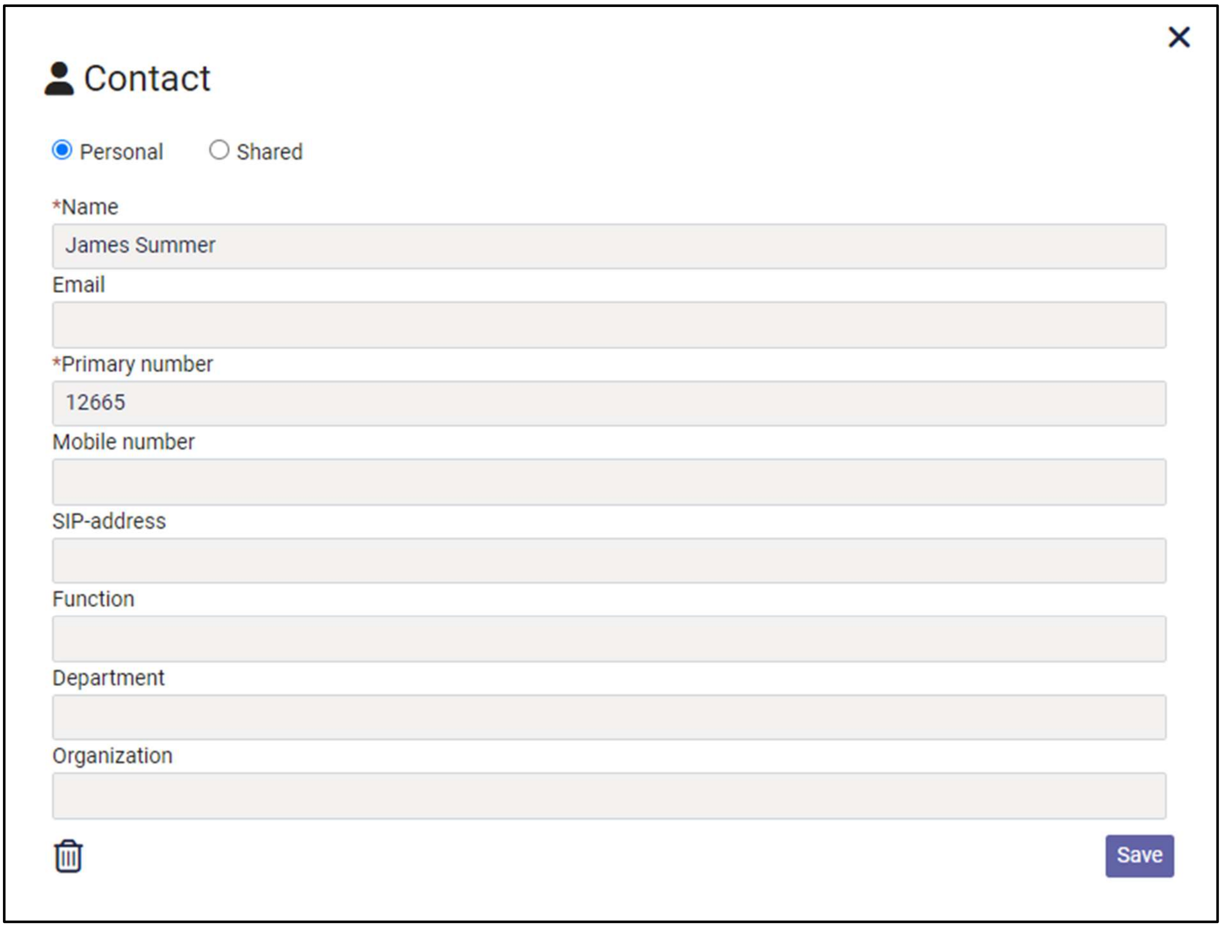
5.9.2 Editing a contact

When you want to edit a personal contact, first search for the contact via the search box in the contact list and select the contact. Then click on the button "Edit" in the Contact Information widget in F7 or click the "Edit" button in F6 itself (Hidden behind the 3 dots).



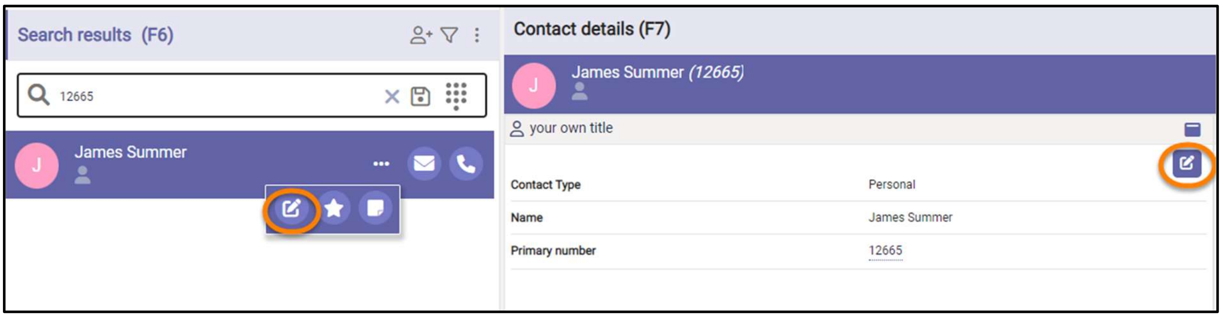
The contact pop-up appears. When you are ready editing the contact, click on the button 'Save' to save the changes or on the 'X' to cancel editing.

Note that the fields in the image might differ depending on your edition of the Attendant.

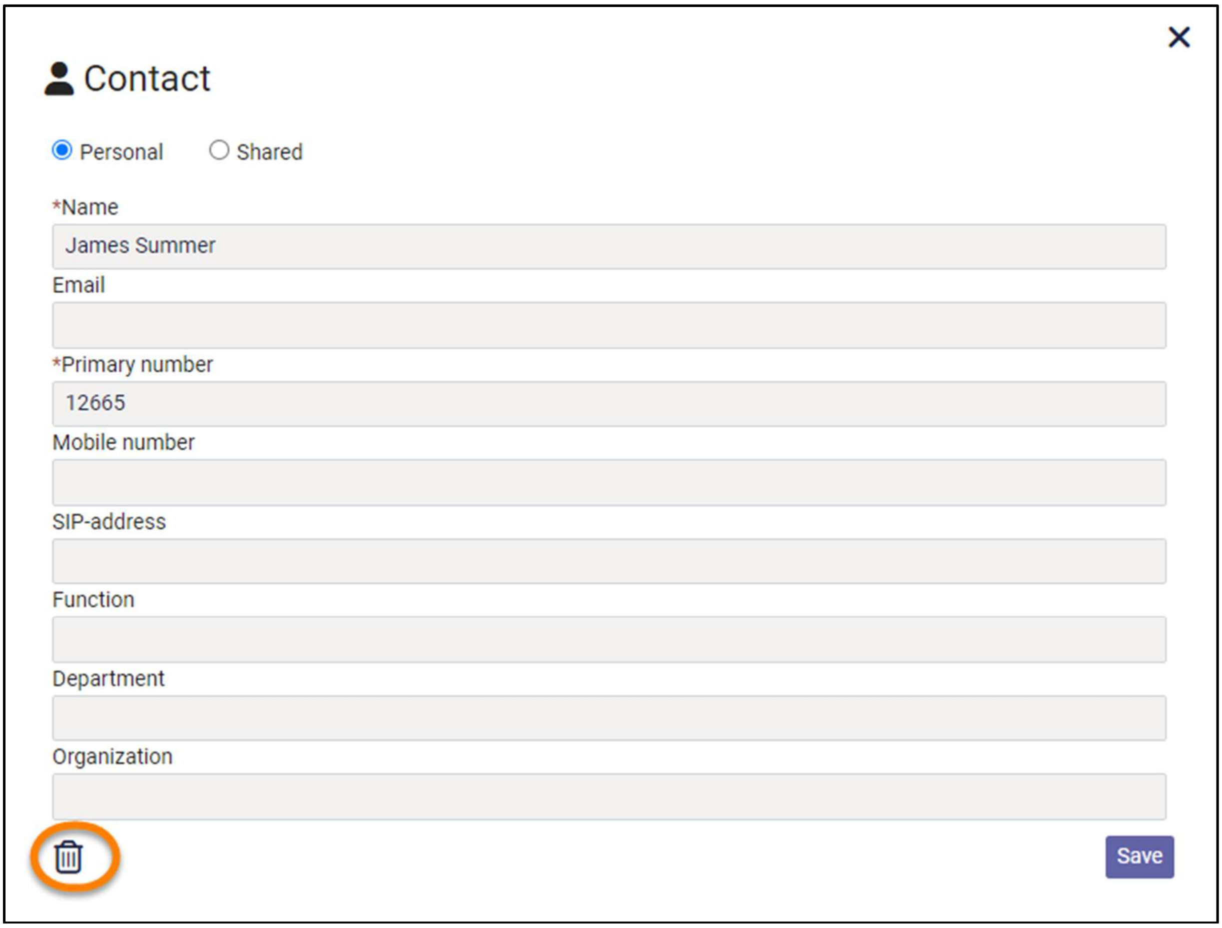


5.9.3 Deleting a contact

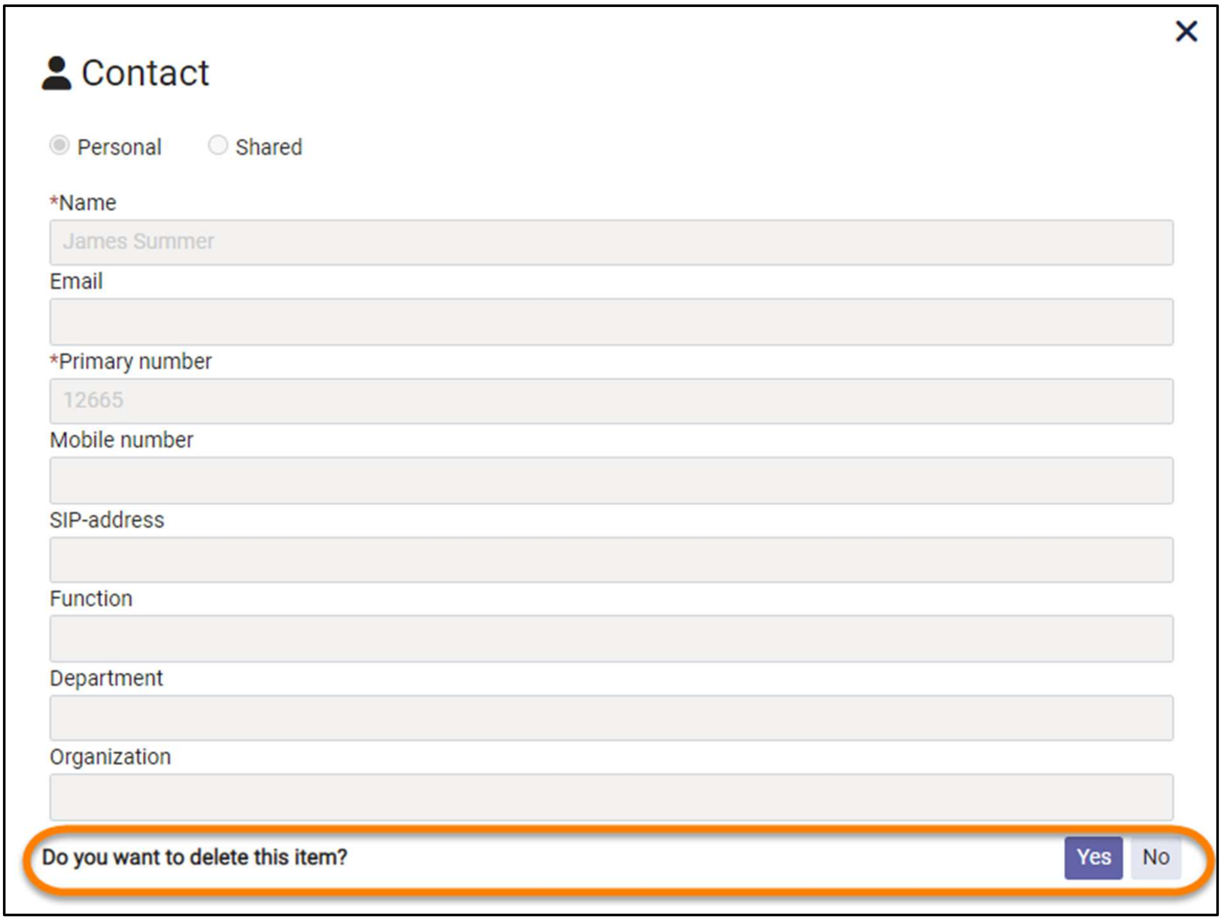
To delete a personal contact, first search for the contact in the search box of the contact list and select the contact. Then click on the button "Edit" in the contact information widget in F7 or click the "Edit" button in F6 itself (Hidden behind the 3 dots).



A popup will open where you can edit the contact, but there will also be a trashcan button:



A confirmation message will be displayed, asking if you really want to delete this contact.



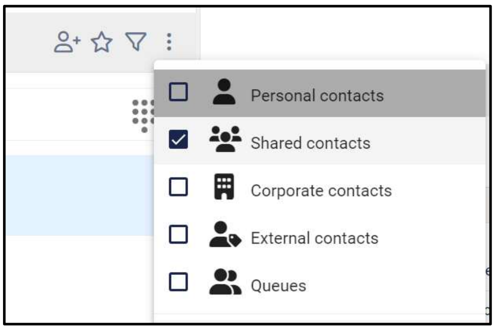
Click on "Yes" to confirm to delete the contact or click on "no" if you don't want to delete the contact.

5.10 Shared contacts

Shared contacts are managed within the Attendant Console, but contrary to Personal contacts, they are visible for all Attendant users. The privilege to manage Shared contacts can be controlled from the Admin portal (see section).

5.10.1 Filtering shared contacts

You can filter on Shared contacts in the filter menu.



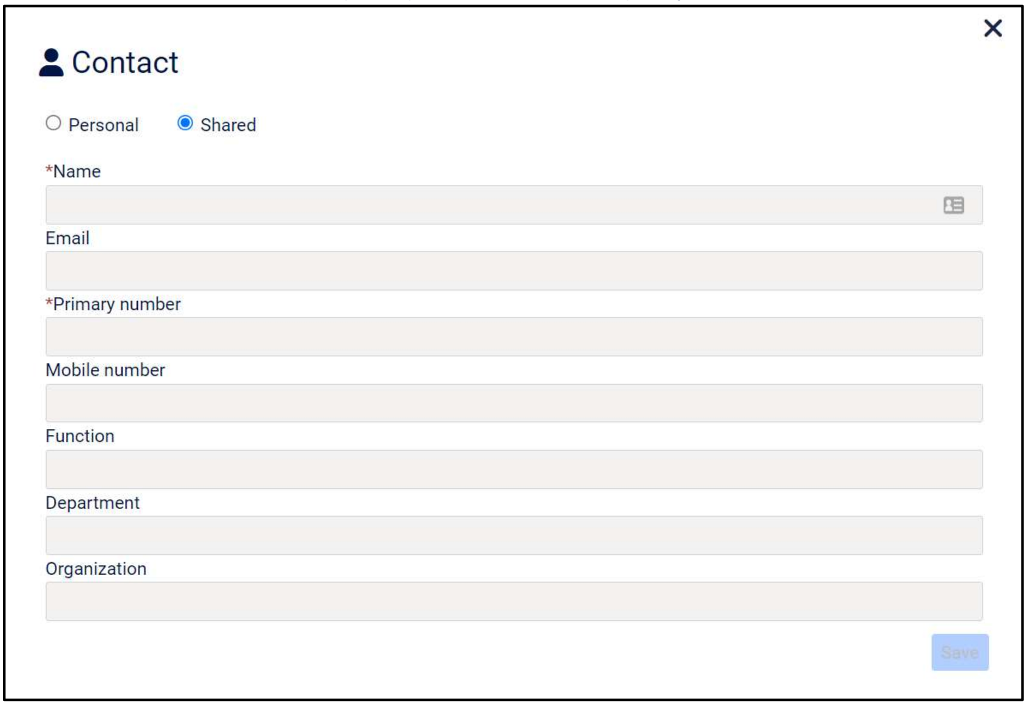
5.10.2 Adding a shared contact

You can add Shared contacts to the contact list in case your account has the rights to do so assigned in the Admin Portal. The steps are:

1. Click on the 'Add contact' button in the title bar of F6:

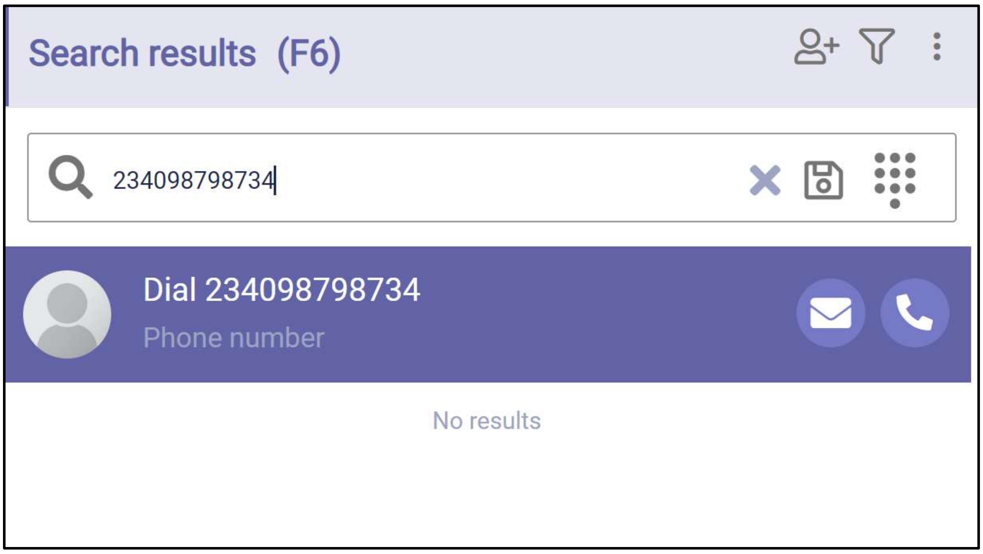
2. Now, a pop-up appears. Select 'Shared contact' and enter the data of the new Shared contact. Click on the 'Save' button to save the new contact. Click on 'X' to cancel.

Note that the fields in the image might differ depending on your edition of the Attendant



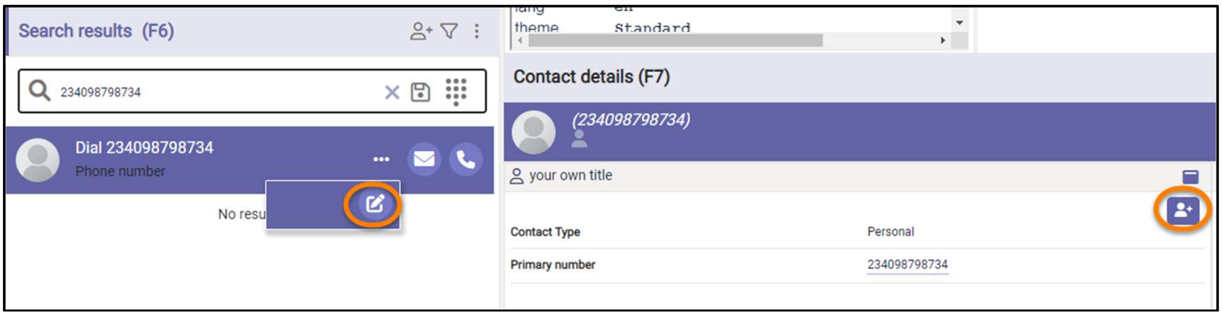
Another way to add a contact is:

1. Search for a number in the search box of the contact list. |



2. Click on the 'unknown number' contact in F6. Then in the Contact Detail panel, you will see a button "Add" in the contact information widget. Click on that button.

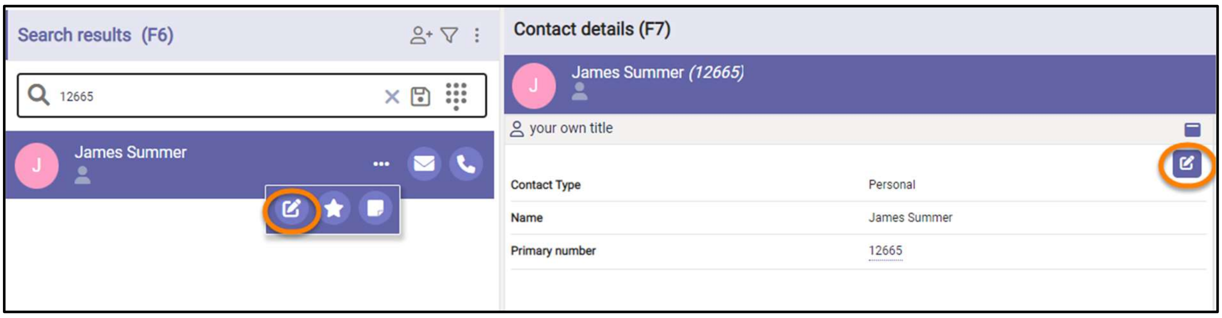
You can also use the button in F6 to add the contact.



3. Then the contact pop-up appears, see at the beginning of this paragraph.

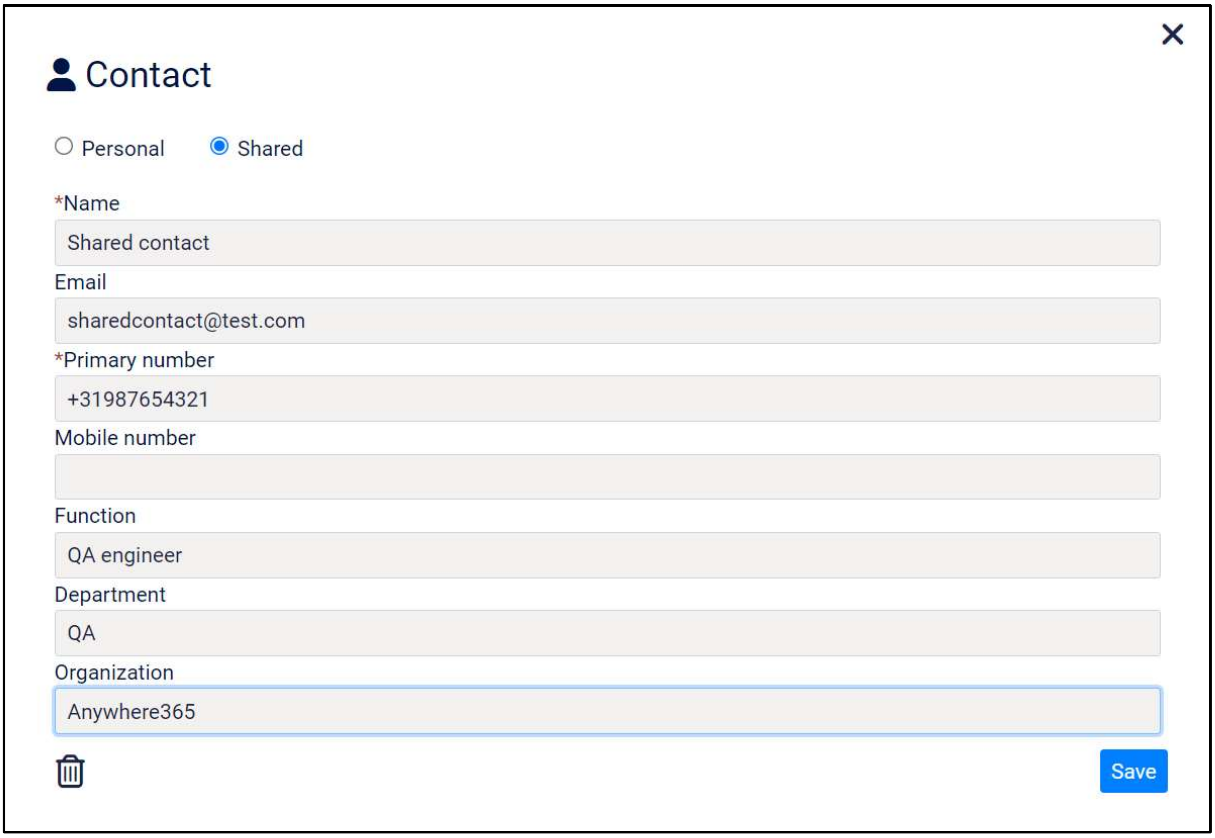
5.10.3 Editing a Shared contact

When you want to edit a Shared contact, first search for the contact via the search box in the contact list and select the contact. Then click on the button “Edit” in the Contact Information widget in F7 or click the “Edit” button in F6 itself (Hidden behind the 3 dots):



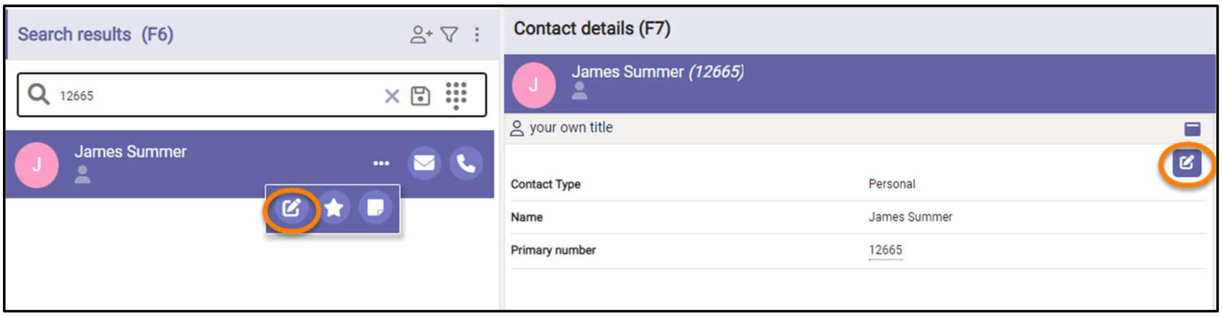
The contact pop-up appears. You can edit the contact, including changing it from Shared contact into Personal contact. You can also convert a Personal contact into a Shared contact and thus making it available for all users. When you are ready editing the contact, click on the button ‘Save’ to save the changes or on the ‘X’ to cancel editing.

Note that the fields in the image might differ depending on your edition of the Attendant.

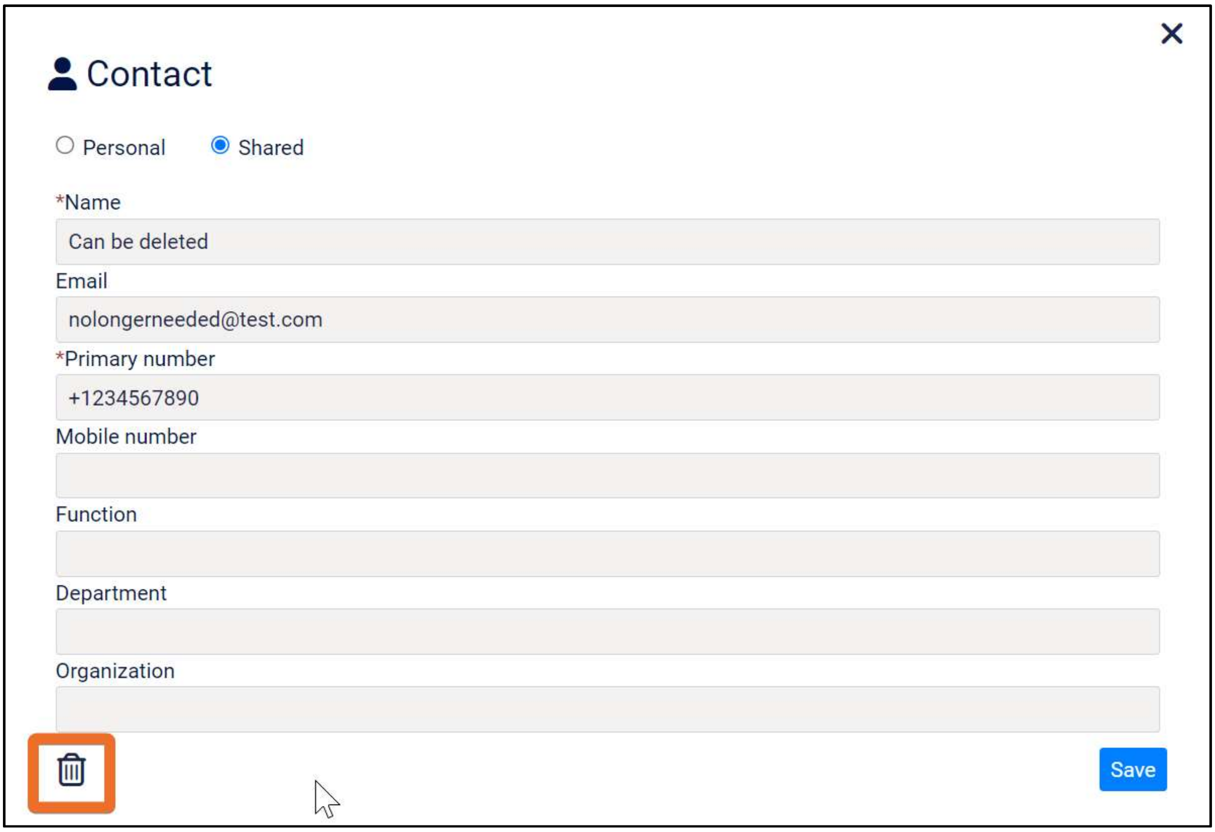


5.10.4 Deleting a contact

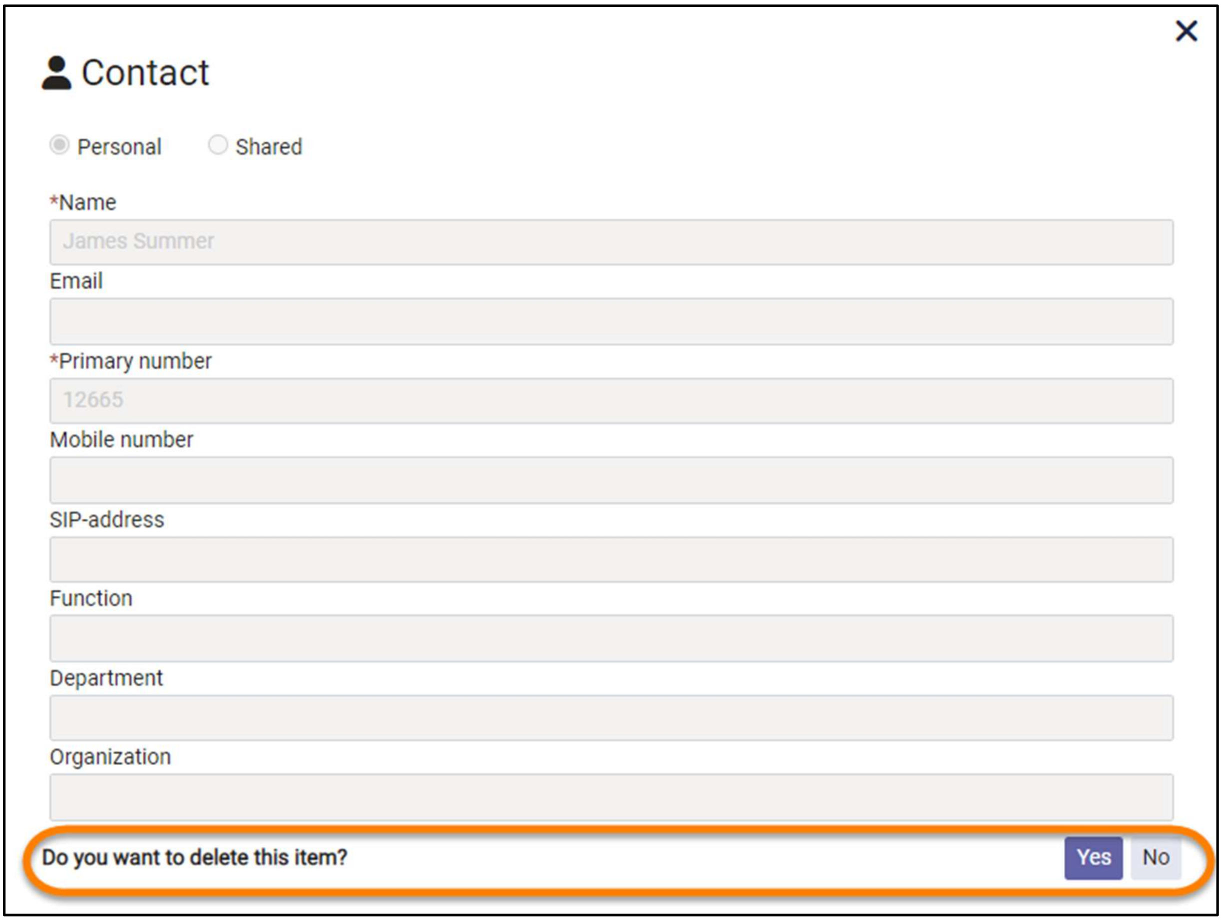
To delete a Shared contact, first search for the contact in the search box of the contact list and select the contact. Then click on the button 'Edit' in the contact information widget in F7.



A popup will open where you can edit the contact, but there will also be a trashcan button:



A confirmation message will be displayed, asking if you really want to delete this contact.



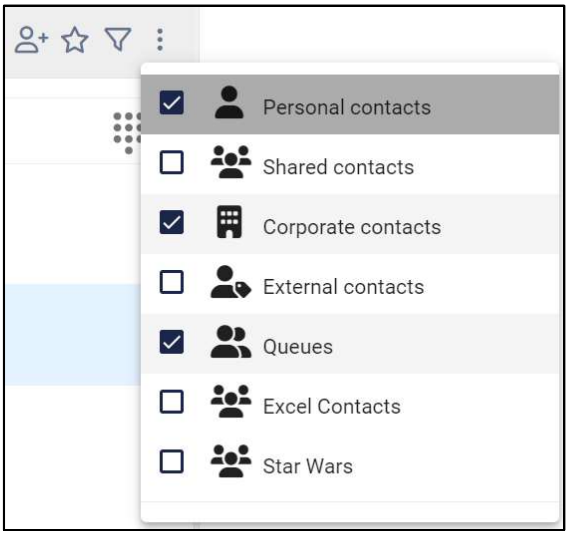
Click on “Yes” to confirm to delete the contact or click on “no” if you don’t want to delete the contact.

5.11 Contact Sources

In addition to the standard Contact Sources, the Attendant supports displaying and filtering contacts from additional sources such as Excel files on a Sharepoint/OneDrive environment. These Contact Sources are managed within the Admin portal.
The contacts are visible to all users that have access to the contact source itself.

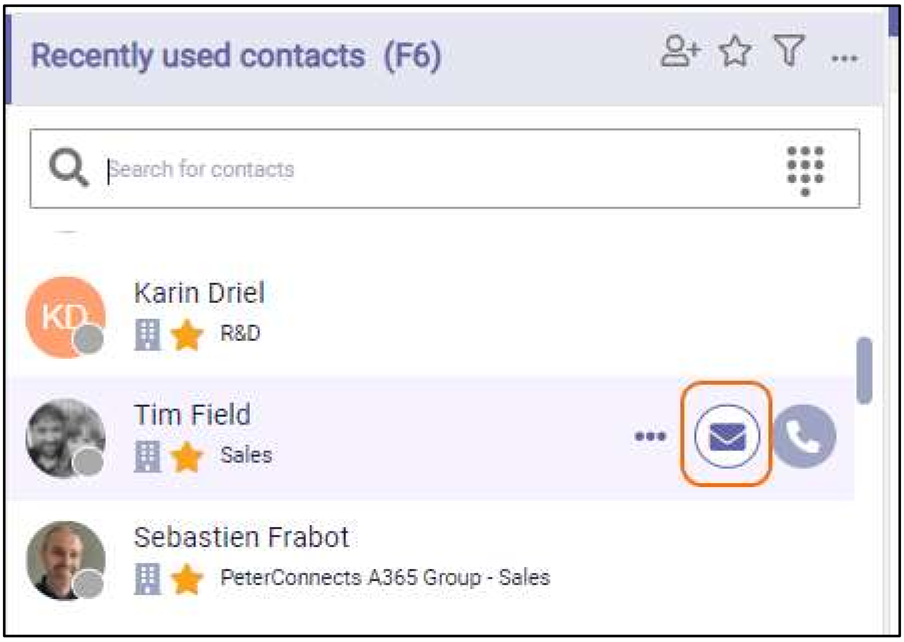
5.11.1 Filtering contact sources

The configured contact sources are shown together with other contact types, in the screenshot below the Queues. The administrator can set up a custom icon for them. On the above screenshot there are 2 external contact sources configured: Excel Contacts and Star Wars Contacts. Using the checkboxes, any combination of contact sources can be enabled or disabled.

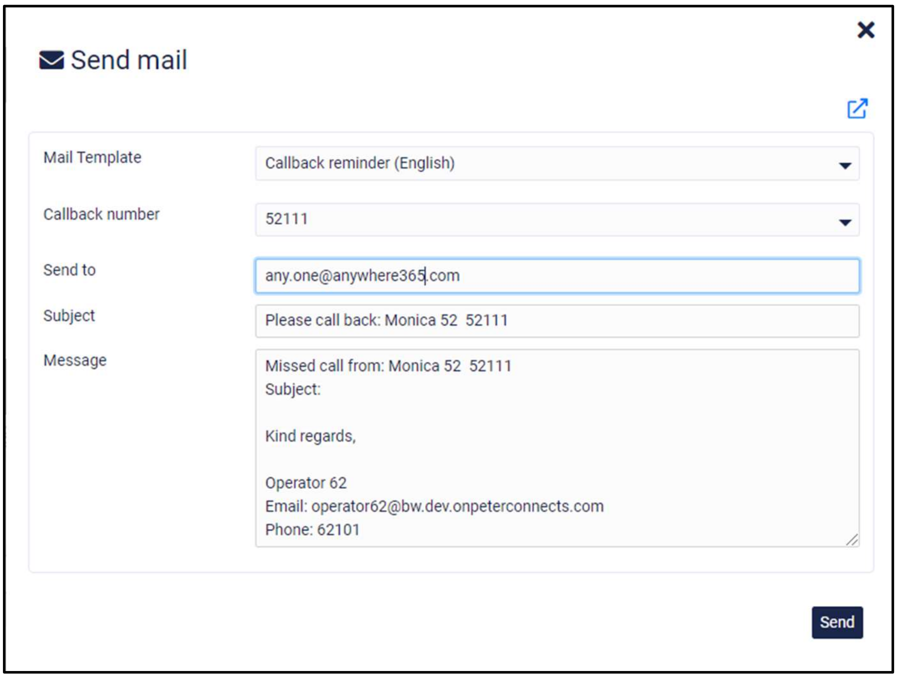


5.12 Sending an email to a contact

To send an email to a contact, press the email button in the contact list next to the person that you want to send the email to. This feature is only available in the Premium edition.



Then the send mail popup will be shown. Here you can enter your email.



The form contains the following fields:

Mail Template	There are one or more mail templates configured. Each can be in another language. The first one is used as default. The mail template can be changed in the pop-up of the email.
Callback number	When you have one or more active calls, you can select to which call this mail applies. See the screenshot below. Default the last selected call will be shown in the template.

Send from	The email address that will be used to send this email. This field cannot be edited in the Attendant. For changing this email address, see chapter [Global configuration]. Note that this field is not shown when this has not been configured in the global configuration.
Send to	The email address of the contact. This field is prefilled when the email address of the contact is known. Otherwise, you can enter an email address.
Subject	The subject of the mail. The subject will contain a predefined text with the data of the most recently selected call in the calls list (F2). You can change the text if needed.
Message	The content of the mail. The message will contain a predefined text with the data of the most recently selected call in the calls list (F2). You can change the text if needed.

Press button ‘Send’ to send the mail.

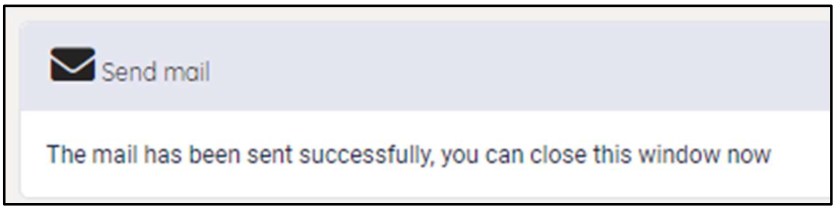
To cancel the email, you can press the ‘X’ button in the top right corner or press the ‘ESC’ button.

5.12.1 Opening the email form in a new window

Suppose you are writing a mail, but suddenly you have to do something in the Attendant. Then you would like to close the mail popup and work on your mail later on. For this purpose the mail form has a pop out button:

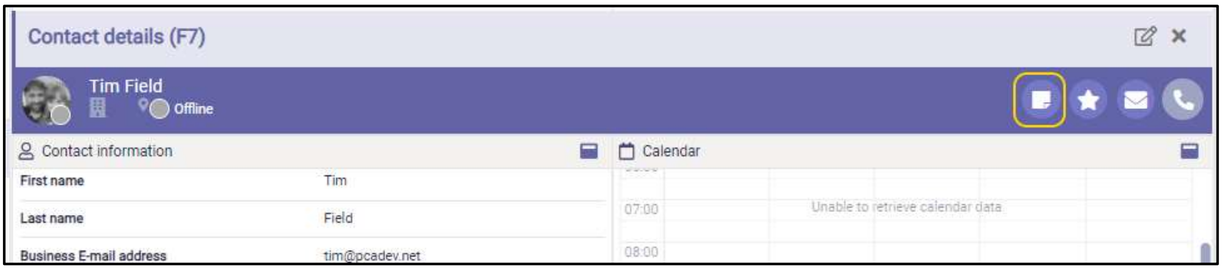
When you click on this button, the mail form will be opened in a new browser window.
Now you can switch between the browser windows to go to the Attendant and back to the mail form later on.

When you have sent the email in the pop out window, a message will be displayed that you can close that browser window now:



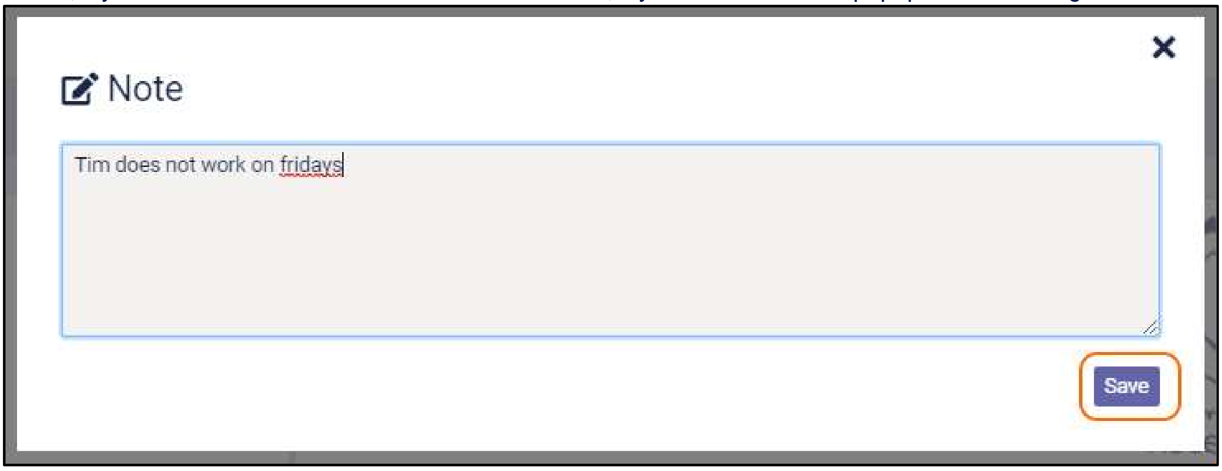
5.13 Making a contact note

In F7 and F3 you can add a note to the selected contact by clicking on the ‘Add note’ button.
This feature is only available in the Premium edition.

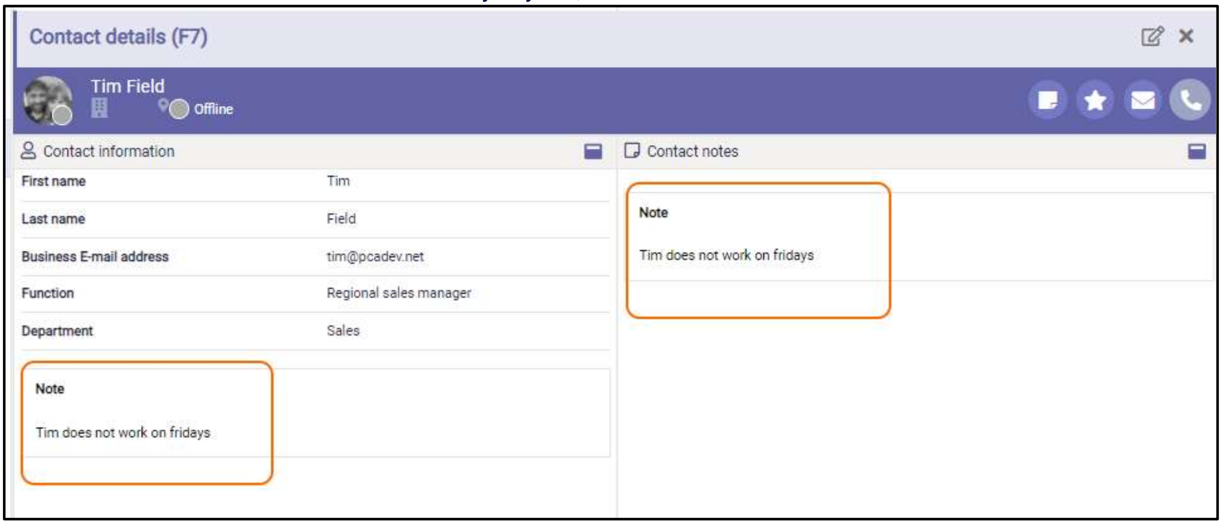


You can also use the ‘Add note’ button in the contacts list (F6)

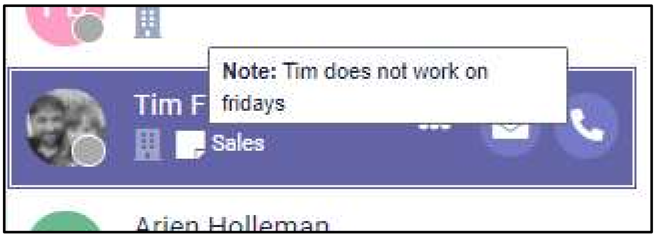
In the popup, you can enter the note. The notes can have a maximum of 1000 characters. Click on the ‘Save’ button, if you want to save the note. Click on the X button, if you want to exit the popup without saving the note.



Now, the note is shown in the contact notes widget and in the contact information widget.
Be aware that the contact note can be seen by anyone, who has access to that same contact.



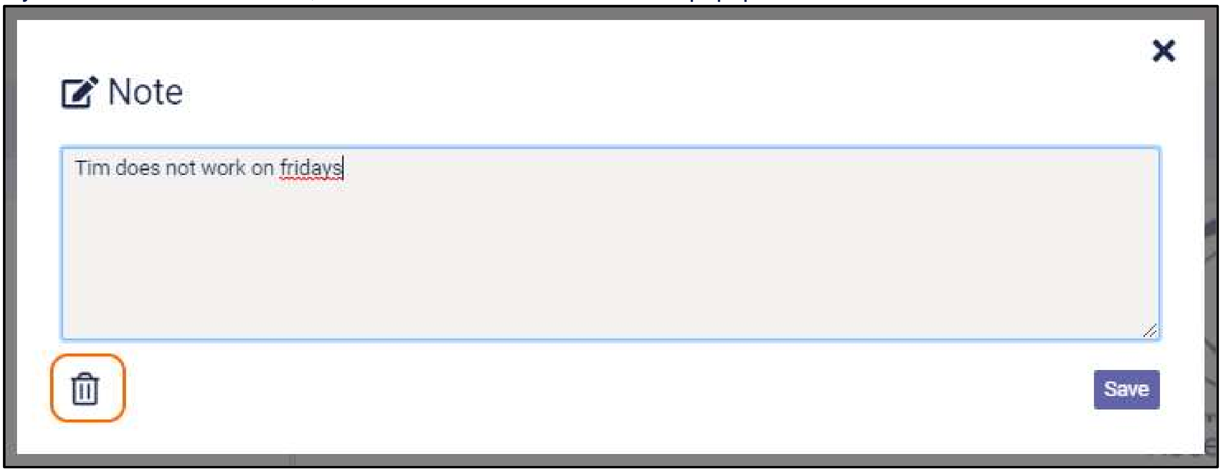
Also, in the contact data in F6 and F7 it is indicated that there is a note for this contact. When you hover over this indication, you see the first 80 characters of the contact note.



You can edit the contact note in different ways:

- Click on the 'Edit note' button
- Click on the 'Edit' button in the contact information widget. The button appears while hovering over the widget
- Click on the 'Edit' button in the contact note widget. The button appears while hovering over the widget

In the popup, edit the note and click on the 'Save' button. If you don't want to save the changes, click on the X button.
If you want to delete the note, click on the trashcan button in the popup:



You will be asked if you want to delete the item. Then click on 'Yes'.

6 Call functionality

6.1 Connection with the server

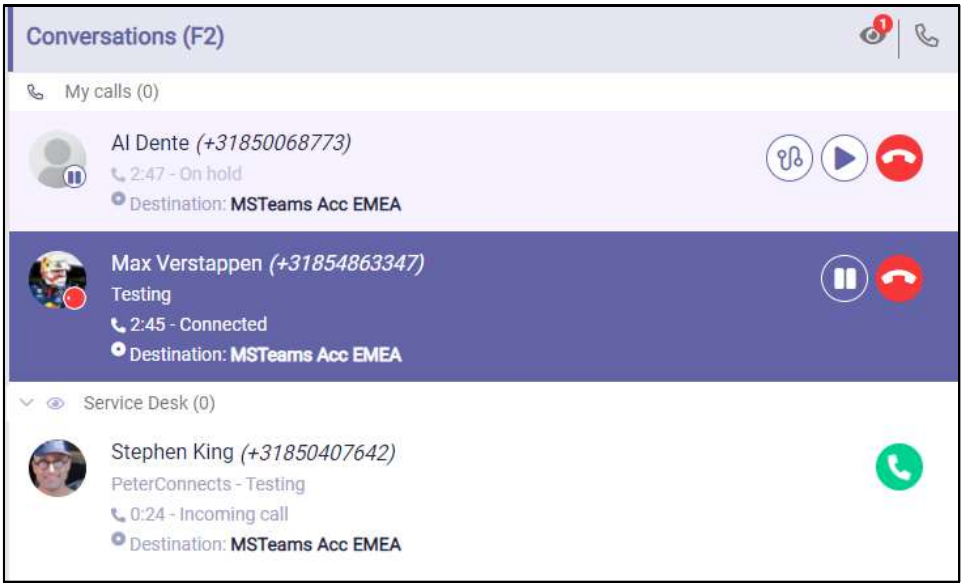
When the Attendant is starting up a connection with the server, you will see the following line of text in the conversations screen:

When it takes too long to connect, the text will become accented and a “retry” button will appear. The button mentions how long it will take before the next retry attempt will occur. If you want to retry earlier, you can click on the “retry” button.

6.2 Call states, destination and call actions

In the screen below, there are three calls:

- A call on hold with Al Dente
- An active call with Max Verstappen
- An incoming call from Stephen King



The following paragraphs describe the elements you can see in the calls in the Conversations (F2) panel.

6.2.1 Call states

The state of the calls is indicated in a small circle in the avatar of the other party.

	This is the active (connected) call
	This call is on hold
	The caller is hearing a pre-alert announcement

6.2.2 Destination information

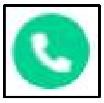
A call can show the following information about the original destination of the call:

Destination:	This is the destination of the call
→ Fallback from:	This shows from which destination the call falls back into Conversations
→ Forward (always) from:	This is shown when somebody is calling to a contact, who has set his call forwarding to you or to the queue, that you have joined/monitored. Note that the forwarding information is only shown, when the call is in the My Calls section of the Conversation panel F2. In the parentheses you can see the reason of this forwarding:

- Always: The call is always forwarded
- Busy: The call is forwarded when the agent is busy
- No answer: The call is forwarded in case of no answer
- Unavailable: The call is forwarded because the agent is unavailable

6.2.3 Call actions

Depending on the state of the call, you can perform the following actions:



Pick up the incoming call

Hang up the active call
Decline an incoming call

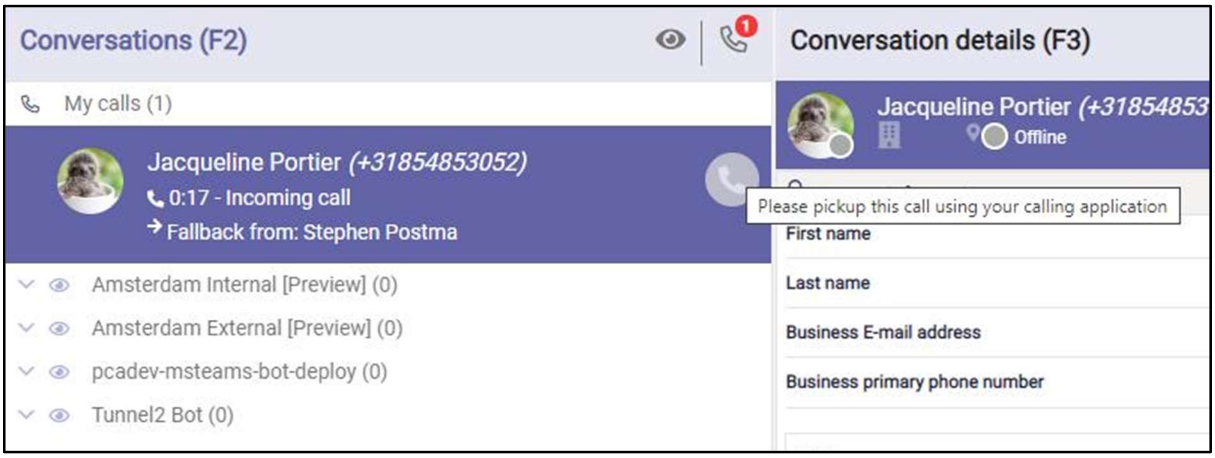
Transfer the call

Put the current call on hold

Retrieve a call from hold

6.2.4 Greyed out pickup button

When the attendant is only using a calling application and no physical device, the pickup button for an incoming call will show up as greyed out, indicating that the phone client should be used to pick up the call.

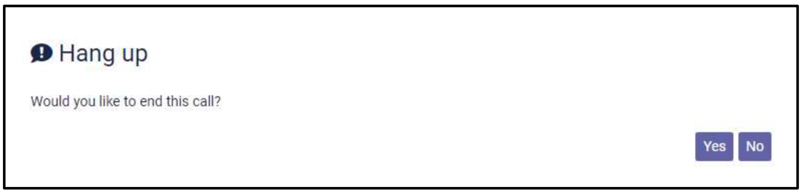


6.2.5 Rejoin pickup button

When the attendant accidentally closes the conversation in Teams, the 'rejoin' button is shown. It looks identical to the normal pickup button and in the text 'Rejoin call' is shown to indicate that the attendant can either rejoin the call (green button) or end the call (red button).

6.2.6 Force hang up calls

In exceptional cases, it can happen a call does not disappear after hanging up. The attendant can now force the call to be dropped using the CTRL + Delete keystroke. A popup is presented to confirm this action.



The standard 'Delete' keystroke to end a call only works when there is also a visible End call button. In case there is a call without a visible End call button, the attendant user can press the CTRL + Delete to remove the (non-existing, orphaned) call.

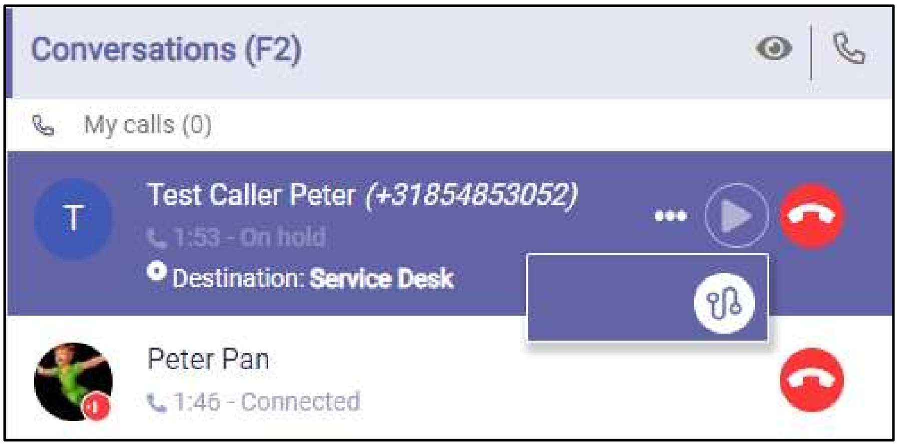
6.3 Transferring a call

There are several ways to transfer a call.

1. **Transfer an active call to a hold call (announced transfer)**

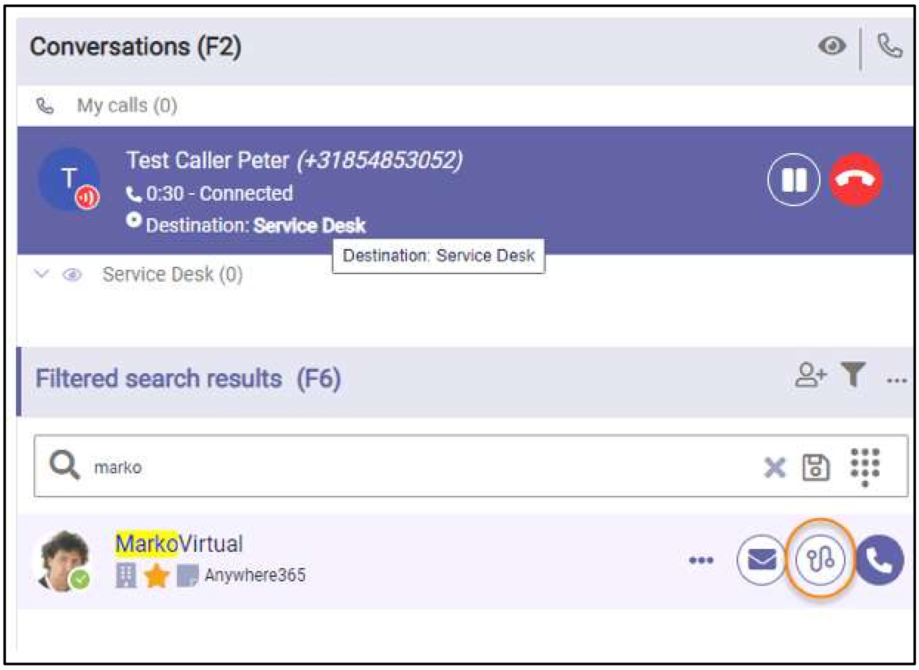
   When you have an active call and a call on hold, you can click on the transfer button to transfer the active call to the held call:

The transfer button might be behind the three dots, when the transfer button is not visible, click on the three dots to make it pop up.



Note: a announced transfer to a queue is not possible.

2. **Transfer an active call directly to a contact (blind transfer)**
   When you have an active call, you can search in the contact list (F6) and transfer the call to that contact:



Note: a blind transfer to a queue is also possible.

3. **“Drag and drop” a call to another call (announced transfer)**
   When you have two calls, you can drag one call with your mouse to another call. When dragging, you will see dotted lines where you can drop the call.

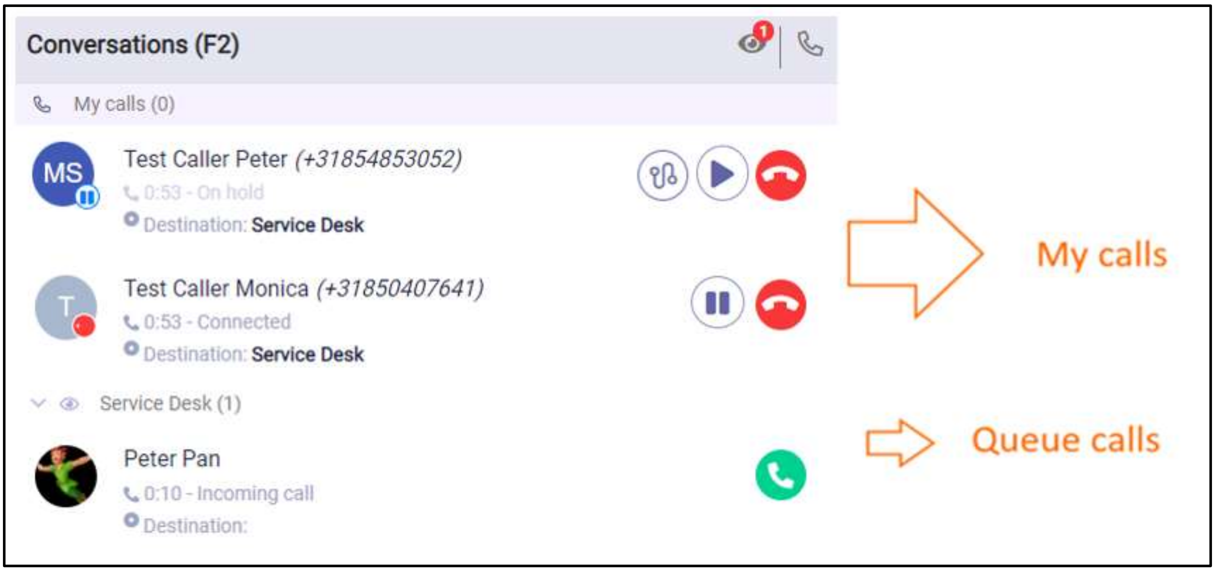
Note: a announced transfer to a queue is not possible.

4. **“Drag and drop” a call to a contact (blind transfer)**
   When you have an active call, you can drag that call to a person in the contact list (F6). When dragging, you will see dotted lines where you can drop the call.

Note: a blind transfer to a queue is possible.

6.4 Working with queue calls

When you have queue(s) assigned to you, the display of the calls will be different.



When you are assigned to join, the calls will be divided by headers:

- **A header named 'My calls'**. These are the calls that you make yourself, or are directly made to you.
- **A header for each monitored queue.** In the example above, it is the queue with the name 'Service Desk'

6.4.1 Answering an incoming queue call

When a call comes in on a queue, then you can click on the pickup button to accept the call:

Then the call will be moved to the 'my calls' section and will have a gray pickup button and a red hang up button:

The call is now ringing in Teams and needs to be accepted in Teams. After this, you will be connected to the call, and the call will be shown as follows:

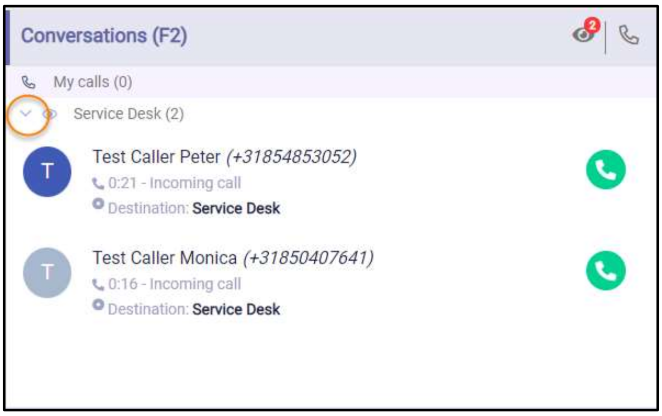
Remark: when using the Teams Desktop integration, the in between step of accepting the call in Teams is no longer needed. More information on the Teams Desktop integration can be found in the section Interface preferences.

6.4.2 Toggling visibility of all monitored queues

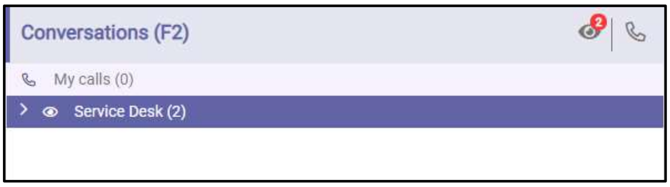
You can toggle the visibility of all monitored queues simultaneously by clicking the eye icon in the F2 header.

6.4.3 Toggling visibility of a single queue

The calls in each queue can be made visible/invisible by clicking on the expand/collapse arrow in the queue header.



Collapsed it looks like this.



6.5 Calling or transferring to other numbers of a contact

6.5.1 Calling to other numbers of a contact

The contact information widget shows all phone numbers of a contact. For example the primary phone number, the mobile number etc.

The phone numbers are underlined to indicate that they are links. When you hover over a row that contains the phone number, a small dial button will appear. When you click on this dial button, a phone call will be made to that phone number.

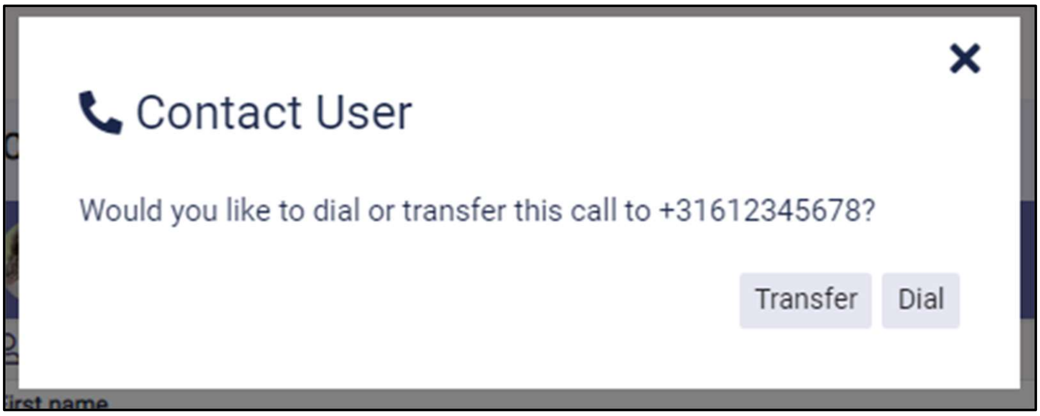
When you click on the number itself, a pop-up will be shown, asking if you want to make a call to the specified phone number:

Press on ‘Dial’ if you want to make the call and on ‘X’ if you don’t.

6.5.2 Transferring to other numbers of a contact

When you want to transfer a call to another number of a contact, you select that contact in the contact list and go to the contact information widget in the Contact Details. When you hover over a row that contains a phone number, a small transfer button will appear. When you click on this transfer button, the call will be transferred to that phone number.

When you click on the number itself, a pop-up will be shown, asking if you want to make a call or a transfer to the specified phone number:



Press on 'Dial' if you want to make the call, on 'Transfer' if you want to transfer the call and on 'X' if you want to do nothing.

7 Attendant status

7.1 Presence

In the right top corner of the Attendant you can see your own states. Default you will only see your presence state:

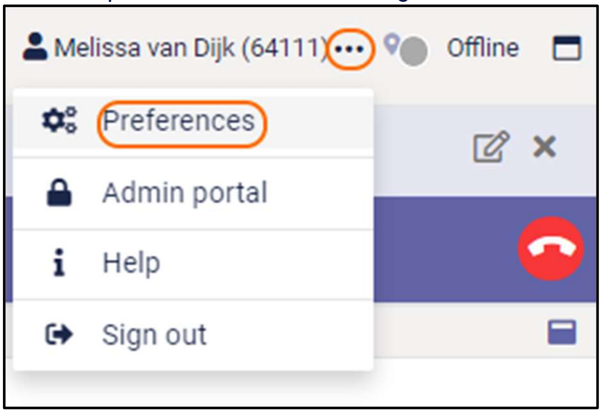
7.2 Do not disturb

When you have “Do not disturb” switched on, it will be indicated by the do not disturb sign as follows:

Note: When your status in Teams is DND (Do Not Disturb), it is not possible to start or accept calls. In that case you will get a warning message:

8 Personalizing the Attendant

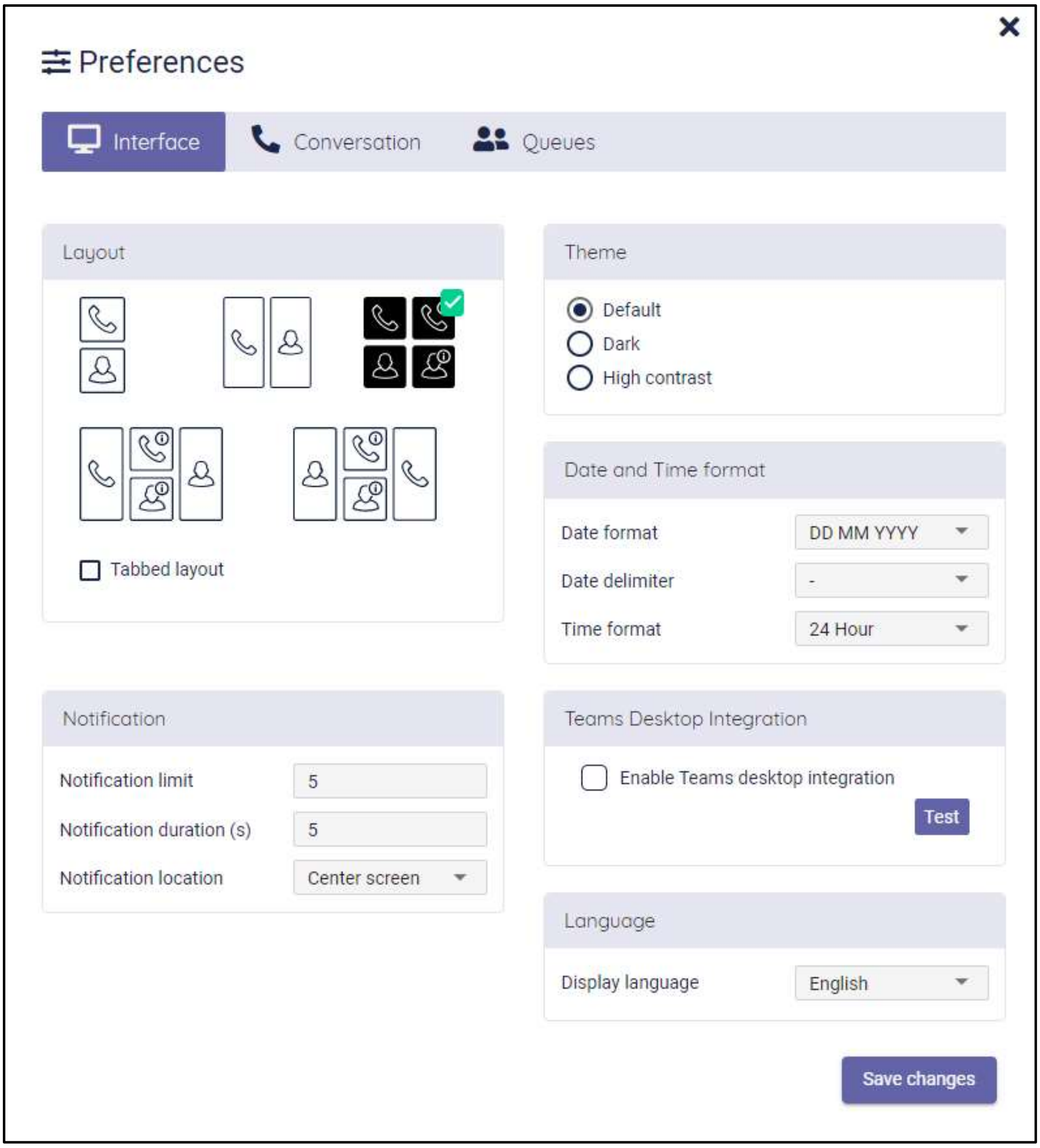
You can open the “Preferences” dialog from the menu bar:



In the preferences dialog, there are several tab pages on which you can set your own personal preferences. These tab pages will be described in the next paragraphs.

8.1 Interface preferences

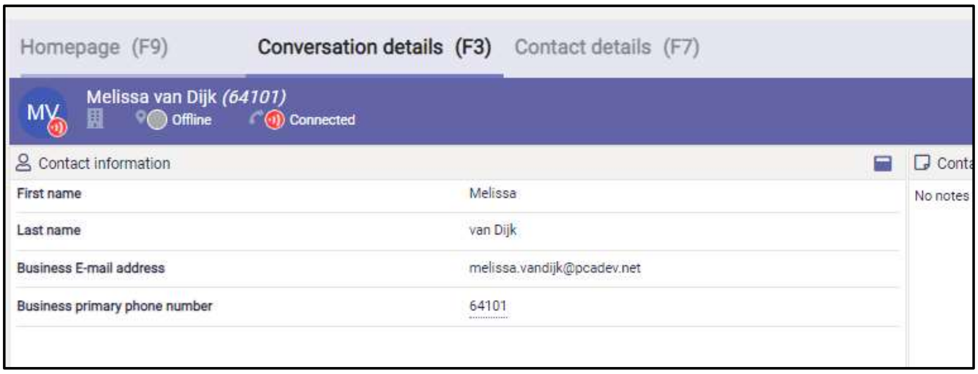
In the preferences dialog, on the Interface tab, you can select a layout, a theme, the date and time format, some notification settings, use of the Teams Desktop integration and the language:


Preferences
Interface
Conversation
Queues
Layout
Tabbed layout
Theme
Default
Dark
High contrast
Date and Time format
Date format
DD MM YYYY
Date delimiter
-
Time format
24 Hour
Notification
Notification limit
5
Notification duration (s)
5
Notification location
Center screen
Teams Desktop Integration
Enable Teams desktop integration
Test
Language
Display language
English
Save changes

Layout
There are currently five layouts to be chosen, ranging from one to three columns. In these layout settings, the icons mean the following:

 = Conversation area (F2)
 = Conversation detail area (F3)
 = Contact list (F6)
 = Contact detail area (F7)

There is also an option for the tabbed layout. In this case, the Homepage, Conversation details and Contact details are displayed in tabs.



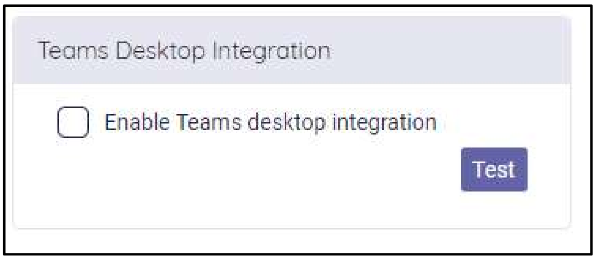
Theme
You can also select a theme: The default theme is shown from the start. The High Contrast theme can be used when you have difficulty seeing contrast. The Dark theme can be selected if you prefer a less bright screen.

Note that the Theme selection is only available in a standalone version of the Attendant. When you run the Attendant integrated in your Teams client, the theme will automatically follow the theme that you have chosen for the Teams client.

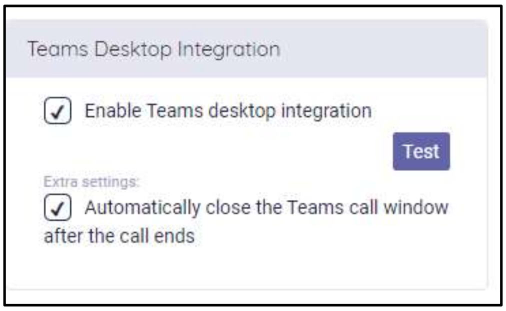
Date and time format
The way that dates and times are shown can be customized by selecting the wanted date and time format and the date delimiter.

Notification
On the bottom of this screen you can select a location for popup notification messages and how many you will get maximum at one time. A notification can look like this:

Teams Desktop integration
The usage of the external application called 'Teams Desktop integration' can be configured. This application reduces the actions the user had to perform in the Teams application. Main functionality is picking up calls, without having to accept the call in Teams as well.

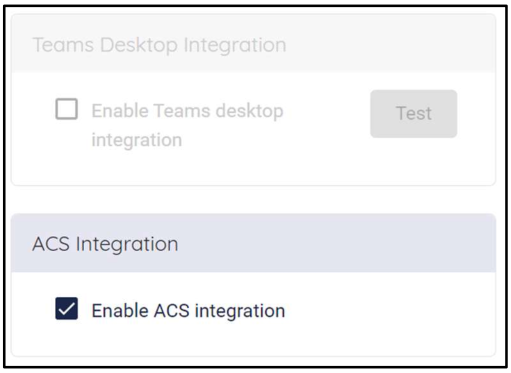


When checking 'Enable Teams desktop integration' an additional checkbox shows. When unchecking this second checkbox, Teams windows used for the calling will not be closed automatically after the call. So preferably leave this on checked.



Note: for more information on the Teams Desktop integration, see https://product.attendant.anywhere365.io/attendant-console-desktop-integrator/

ACS Integration
The usage of Azure Communication Services called "ACS" can be configured. With ACS, calls will be handled in the Attendant Console itself and not in Teams. With activating ACS, the actions the user has to perform to handle calls will be reduced. Having ACS activated will not change the call handling itself, but will have impact on audio settings. Audio of the conversations will need to be configured in the computer audio settings.

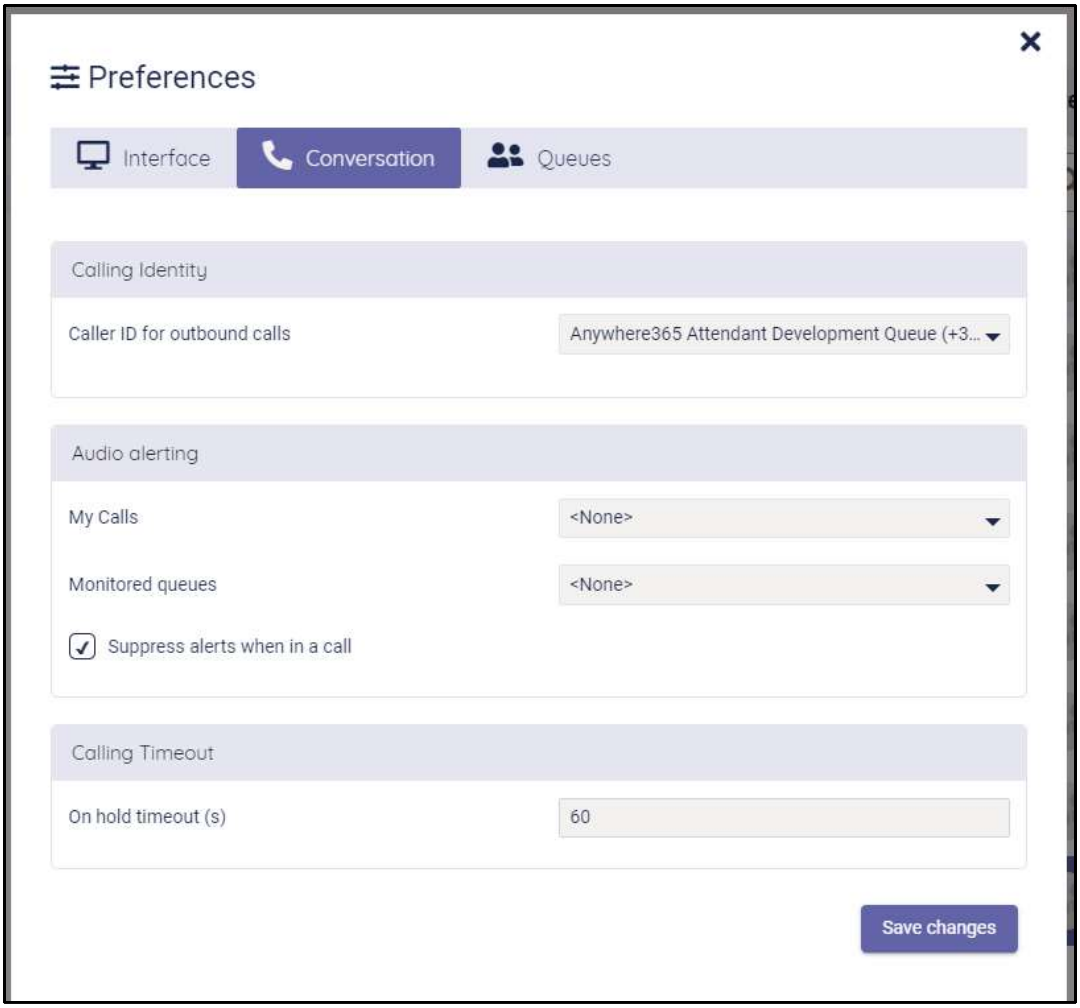


When ACS is enabled Teams desktop integration can't be used and vice versa.

Language
you can set the display language to different languages like English, Dutch, French, German, etc.

8.2 Conversation settings

On the tab "Conversation" you can configure some settings, that have to do with telephone conversations. The settings are described in the following paragraphs.



8.2.1 Calling Identity

In this section you can select which 'Caller ID' has to be used for making outbound calls. You can select only one 'Caller-ID' from the drop down. After saving the selection you are able to make outbound calls.

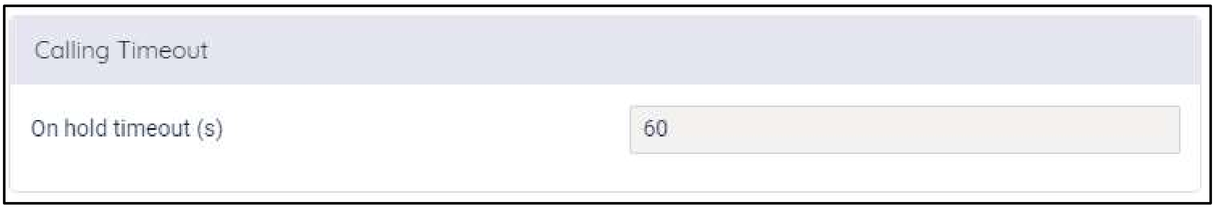
Remark: making outbound calls also requires a configuration to be correct in the Azure account. Contact your administrator in case after the configuration of the Calling Identity, you still cannot make outbound calls.

8.2.2 Audio Alerting

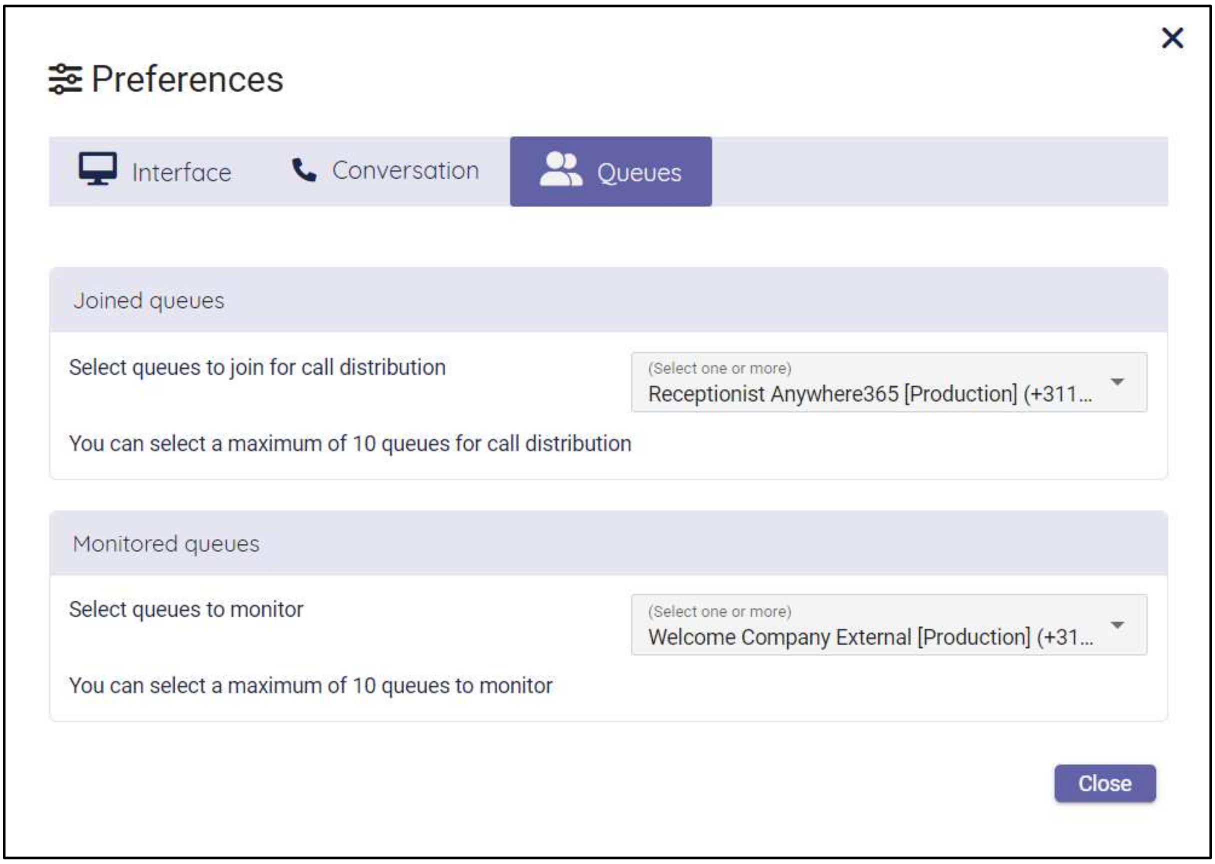
in this section you can set audio alerting. When audio alerting has been set, an audio signal is played when a new call comes in. The type of alerting sound can be chosen and can be different for queue calls and my calls. It is also possible to suppress alerts when you are in a call, using the checkbox 'Suppress alerts when in a call'.

8.2.3 Calling timeout

In the section “Calling timeout” you can set the amount of seconds for the on hold timeout. When the on hold time of a call exceeds the amount of set seconds, the line of the call that shows the on hold time and status starts blinking.



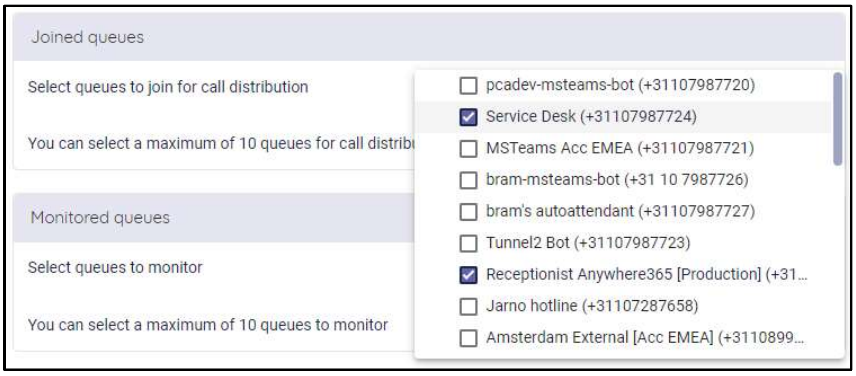
8.3 Queue management



After selecting one or more joined and/or monitored queues, the ‘Close’ button changes in a ‘Save’ button. Click on the ‘Save’button to save the new settings.

8.3.1 Joined queues

To add a queue to join, open the drop-down box (with the arrow pointing down) and check which queues you want to join. To remove a queue, uncheck the queue in the drop-down box.



When you have selected a queue to join, calls on that queue will also ring directly in the 'my calls' section of F2 and on your Teams client, when it is dispatched to you.

8.3.2 Queues to monitor

With a similar drop down as for selecting joined queues, you can also select which queues you want to monitor.

Note: When you have chosen to monitor a queue, but you have not joined it, calls on that queue will only be visible in your monitored queue section in F2 and not in 'my calls' or in your Teams client.

8.4 ACS Integration

With ACS (Azure Communication Services) calls will be handled in the Attendant Console and not in Teams. This doesn't change anything in the handling of queue calls and outbound calls initiated from the Attendant Console.

Audio
Because of ACS Teams is not being used to handle the calls the default audio (device) settings on the computer will be used.

Presence
The presence in Teams will be set to "Busy on a Call" when an agent is handling a call in the Attendant Console (having a call in My Calls). When not being active in handling a call, the presence of the agent will show as set in Teams based on the agent's actual presence.
When setting the presence in Teams manually to a certain presence state it will overrule any other presence set and therefore will also overrule presence set by having a call in "My Calls".
The "Reset status" in Teams will help to get the actual presence status back.

Teams
Although Teams is not being used for handling calls when having ACS activated, it is to be advised to still have the Teams application active for handling personal (direct) calls, chatting, participating in meetings and using

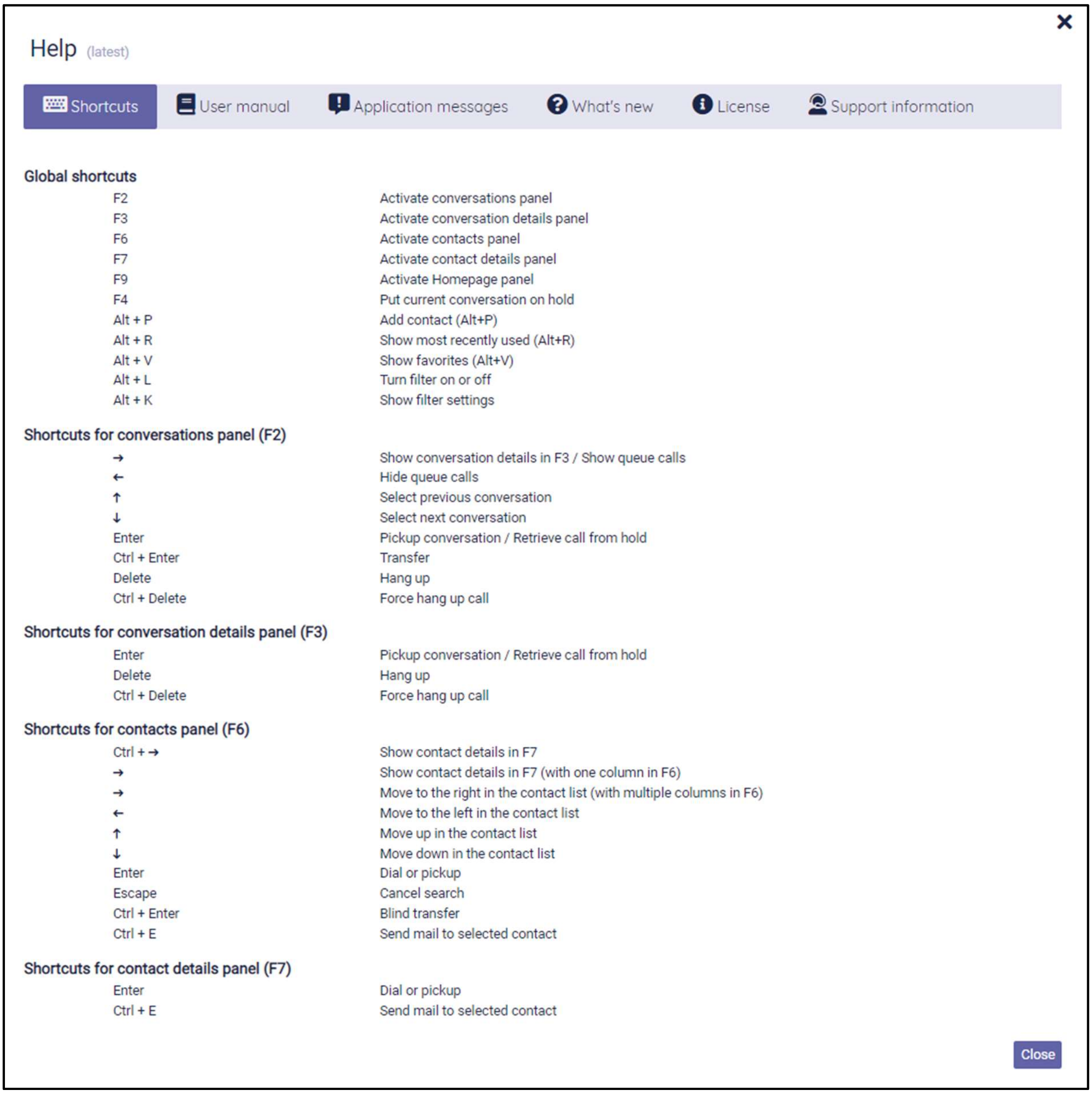
other functionality Teams provides.

Prerequisites
To be able to use ACS, the admin consent of the Attendant Console needs to be renewed and a connection string needs to be created and added to the Admin portal. See paragraph **Error! Reference source not found.**. for more information.

9 Keyboard navigation

The Attendant allows keyboard navigation via shortcut keys. This will help keyboard centric operators to operate faster.

The shortcuts are shown in the Help menu:

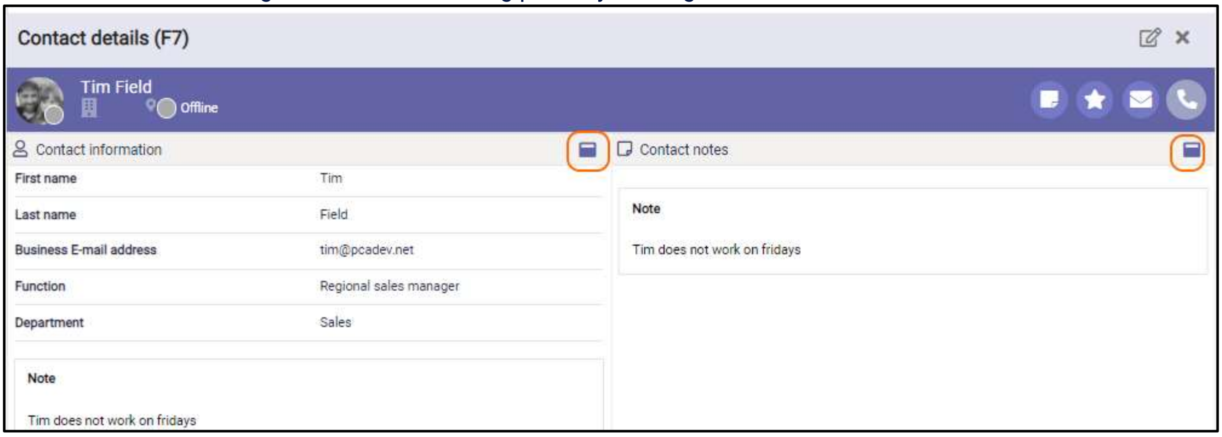


10 Widgets

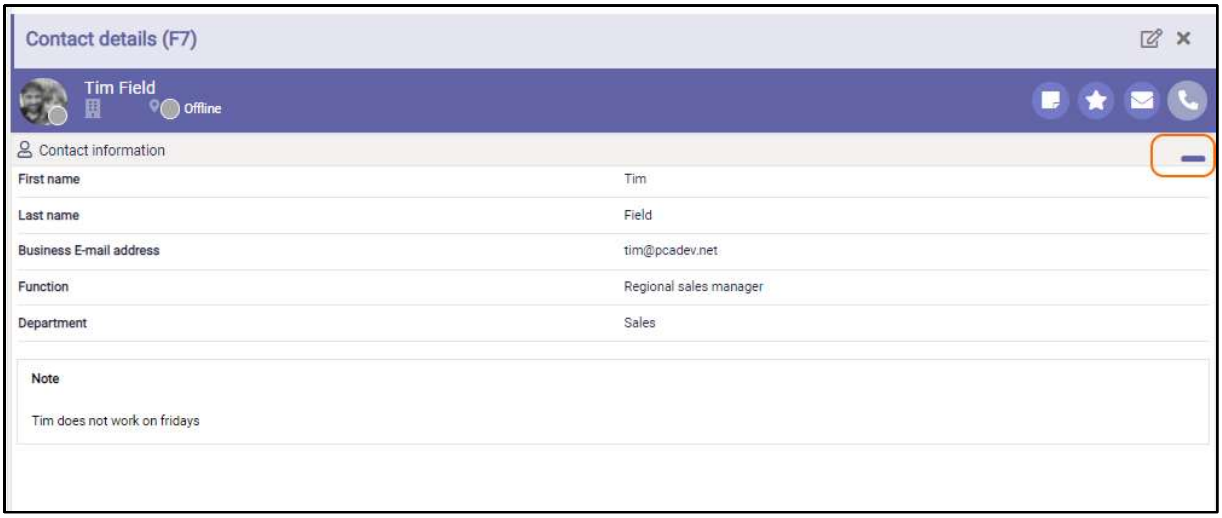
The detail areas of the Attendant (and the homepage as well) contains widgets. These are small application parts that operate on either the currently selected conversation or the currently selected contact.

10.1 Maximizing and restoring

You can maximize a widget within its containing panel by clicking on the maximize button:



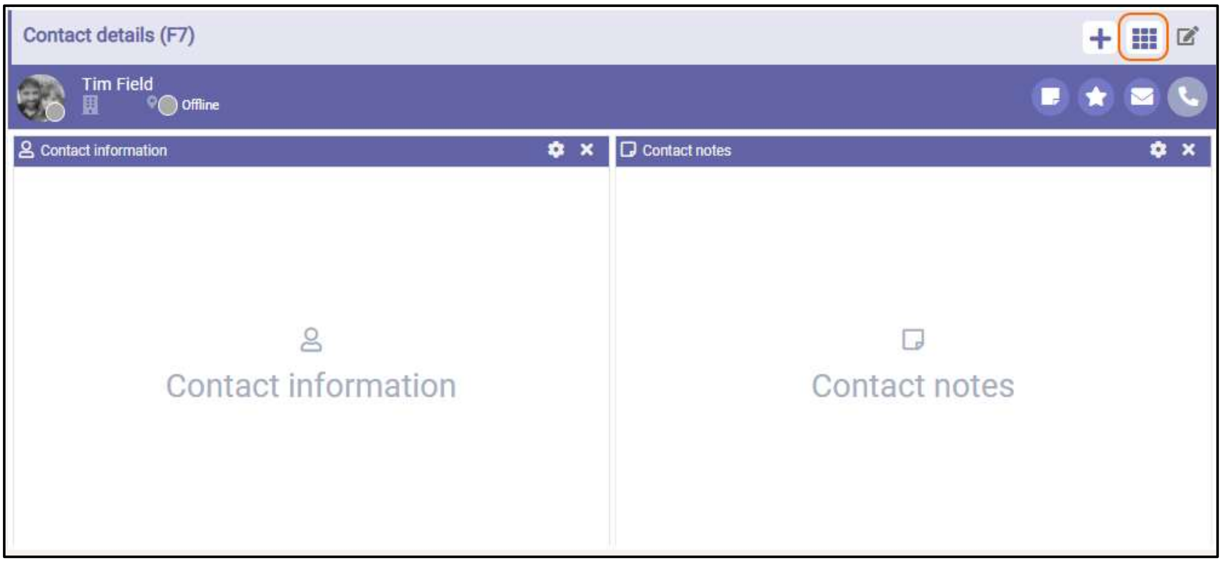
And you can restore the widget again by clicking on the minimize button:



Note that the maximize button is not shown when there is only one widget in the panel, because when there is only one widget, it is already maximized to the contents of the panel.

10.2 Moving the widgets around

When you want to change the layout of the widgets, you can click on the 'Edit widgets'  button. The widgets become editable and you can drag and drop them and resize them. The widgets are positioned on a grid that becomes visible when dragging / resizing:



The widgets will automatically snap to the closest line on the grid. You can give the widgets any size and position.

You can automatically organize the widgets again by clicking on the 'Arrange widgets'  button.

You can remove a widget by clicking on the 'X' (Remove widget) in the title bar of the widget.

You can stop editing the widget by clicking on the 'Stop editing'  button.

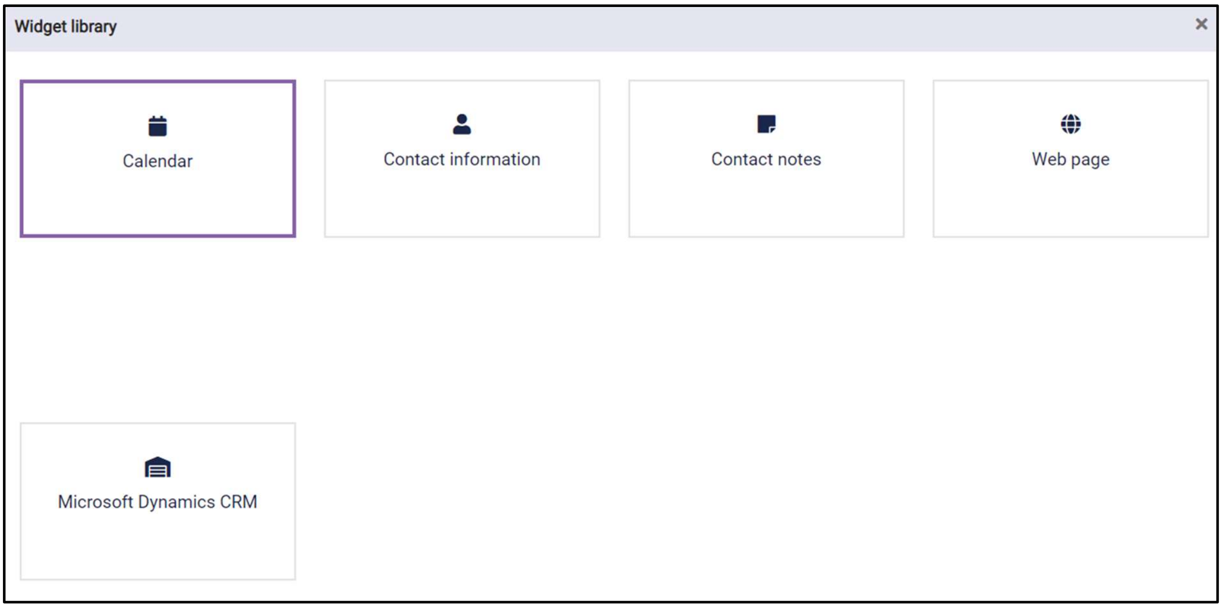
Note that the content of the widgets is not shown in edit mode. The content will be shown again when you stop editing the widgets.

10.3 Adding a widget

In the edit modus of the widgets, click on the button 'Add a widget': 

Then the widget library will be shown, where you can select a widget:

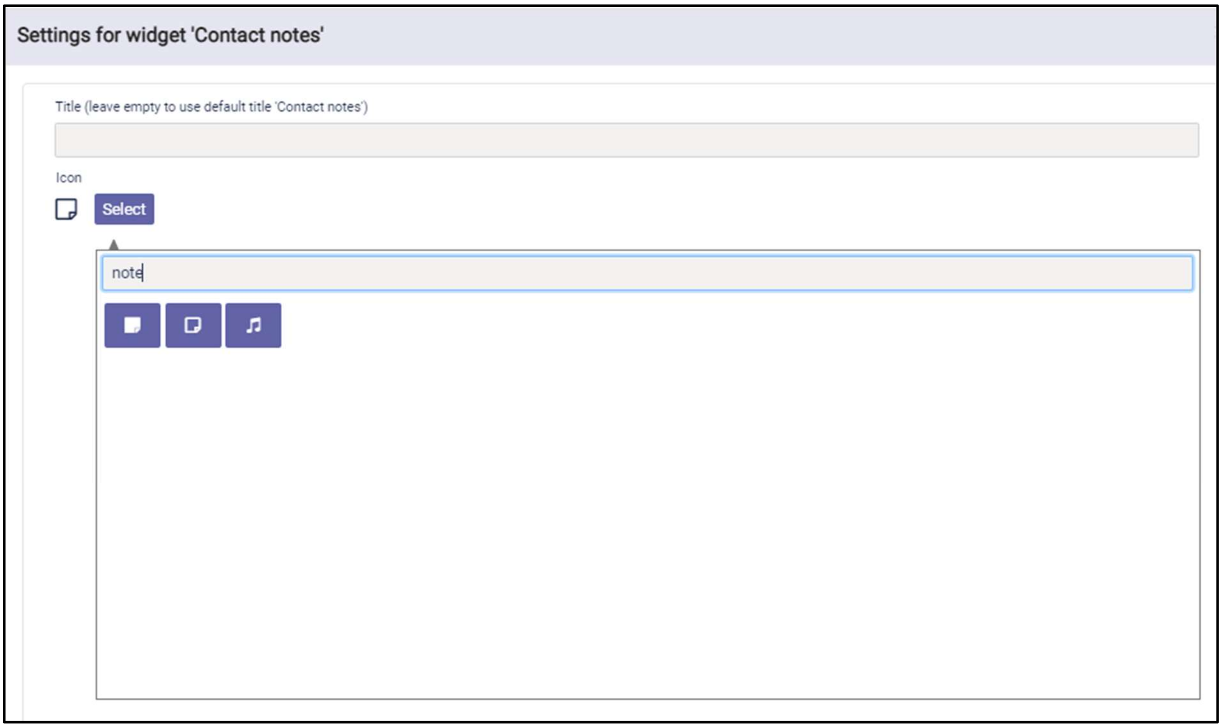
Note: *The actual widgets that are available to you might be different than the ones displayed below. This image is just for demo purposes.*



Select a widget and click on the button "Add". After adding a widget, you can configure it.

At least you can edit the title and the icon. The title is not mandatory. If you leave the title empty, the default title will be used. This default title will also automatically be translated, when you select another language via 'Preferences'. When you do enter a title, that title will override the default title and will not automatically be translated, when another language is selected.

If you want to change the icon, you can click on the 'Select' button to show the icon selector. Then you can search for a specific icon, for example 'note'.



The icon search is only available in English, because the icons are coming from a public library named ‘Font Awesome’.

Some widgets require more configuration. Those will be described in the next paragraph.

Click on ‘OK’ to add the widget. Click on ‘X’ to exit the settings screen.

You can change the configuration of widgets that had already been added by clicking on the ‘Configure widget’ button .

Exit the editing of the widgets by clicking on the ‘Stop editing’ button .

10.4 URL Placeholders for widgets

Widgets that need a URL can have placeholders. These placeholders will be used by the Attendant to provide the target data provider with extra request data. The placeholders are:

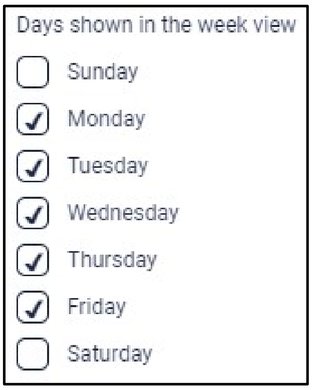
[CLI]	This placeholder stands for "Calling Line Identification". This is the phone number of the person that is calling.
[EMAIL]	The Attendant uses this tag as placeholder for the email-address of the currently selected person. For example, if a call is selected and the email address of the calling person is known, the email placeholder will be filled with that email address. If the email address is not available, an empty string will be used.
[LANG]	This tag will be placeholder for the currently selected language in the Attendant. The following placeholders are provided: en = English, fr = French, nl = Dutch, de = German, es = Spanish, da = Danish

[THEME]	(Only for the Webpage widget) This placeholder will be replaced with the name of the current theme, e.g. standard, dark, high contrast.
[DESTINATION]	(Only for the Webpage widget) This tag provides information about the called destination.
[CONTEXT]	(Only for the Webpage widget) This tag provides information about the caller and the user of the Attendant.

10.4.1 Calendar widget

This widget shows the calendar information for a contact, when the calendar has been configured by your administrator. This widget is only available in the Premium edition.

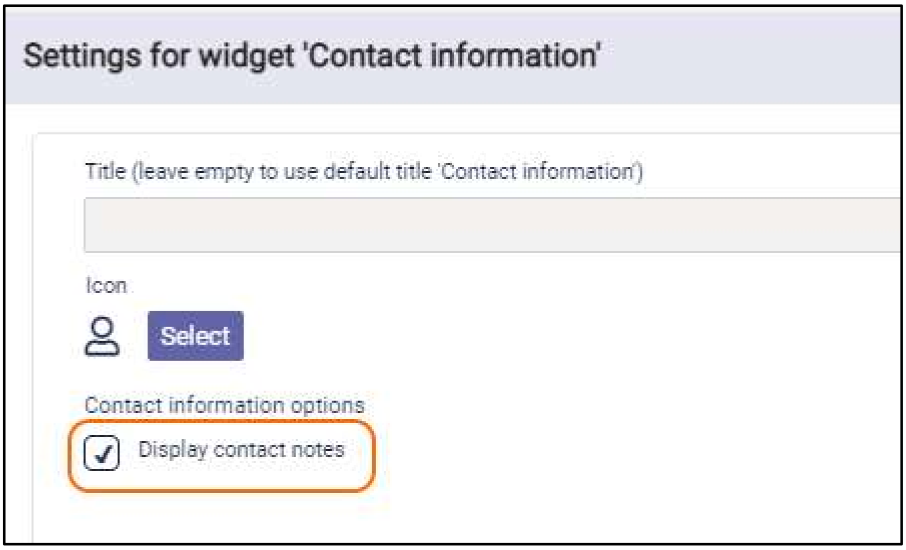
The days of the week, that have to be displayed in the calendar in the week view mode, can be chosen in the configuration of the widget.



10.4.2 Contact information widget

This widget shows the basic contact information for the selected contact. Note that for contacts from some platforms, "extension" is displayed as "primary phone number" in the widget and "number" as "alternative phone number". When there is no extension, the number is displayed as primary phone number in the widget.

In the configuration it can be indicated, whether the contact notes should be displayed in this widget or not.



10.4.3 Contact note widget

With this widget, you can read and edit contact notes. Be aware that the contact note can be seen by anyone who has access to the same contact. This widget is only available in the Premium edition.

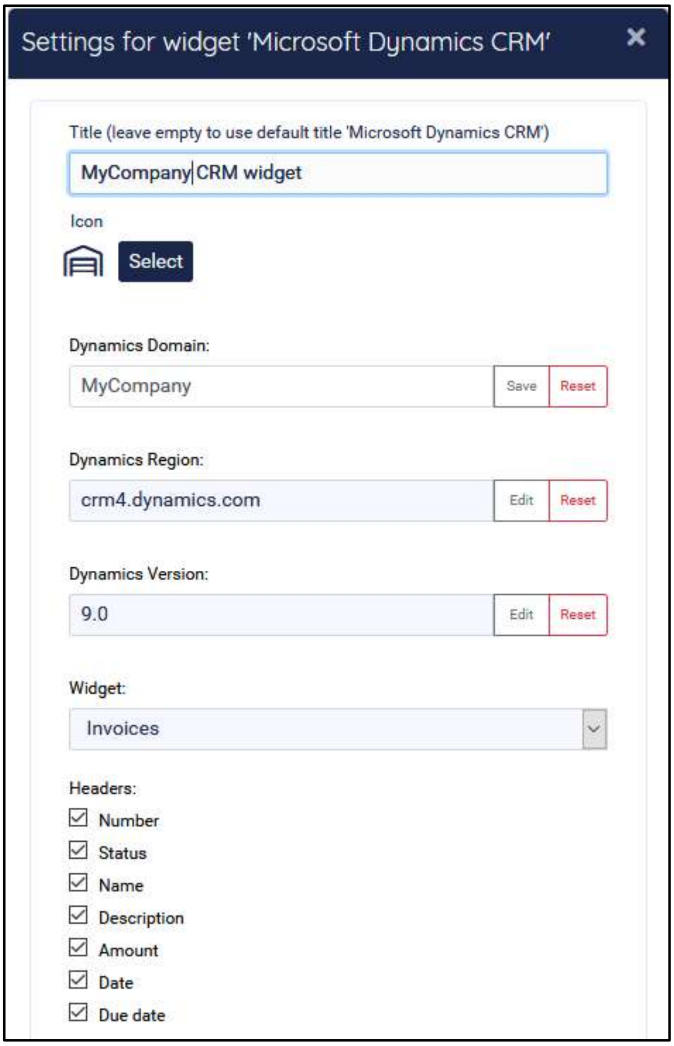
10.4.4 Homepage widget

This widget is shown on the homepage screen, when the Attendant is just started up.

10.4.5 Microsoft Dynamics CRM widget

This widget serves the Attendant with content from the Microsoft Dynamics CRM.
This widget has to be put on the Conversation details panel (F3).

For this widget, the following configuration is requested:



Title	Optional title, just like every other widget
Icon	Optional other icon, just like every other widget
Dynamics domain	The domain that you are using, for example MyCompany
Dynamics region	The region that you are using, for example crm4.dynamics.com
Dynamics version	The version of you dynamics system, defaulted at 9.0
Widget	Using the drop down box, you can select which type of information you want to see in the widget. For example 'Invoices' or 'Opportunities'
Headers	Depending on the selected information type in 'Widget', you can select the headers you want to see

Note that you have to click 'Edit' in order to edit the individual configuration parts and that you have to click 'Save' to save the individual configuration parts.

To use this widget in the Attendant, you have to be logged in in the Microsoft Dynamics CRM via this widget. When you are not signed in yet, the widget will show a Microsoft login window.

After you signed in, you are able to see information in the Microsoft Dynamics CRM widget. To see this information, you have to select the caller in the Conversations panel (F2), so the caller will be visible in the Conversation details panel (F3). For example, when you click on a call and you selected information type 'Invoices' in the configuration of the widget, you will see the invoices of the company of the caller:

When you click on any of the invoices in the widget, a new browser tab will be opened, where you view the information in the Microsoft Dynamics CRM itself.

Note: For connecting to the Microsoft Dynamics CRM from the Attendant, an administrator has to give admin consent. This is described in the chapter 'Global configuration'

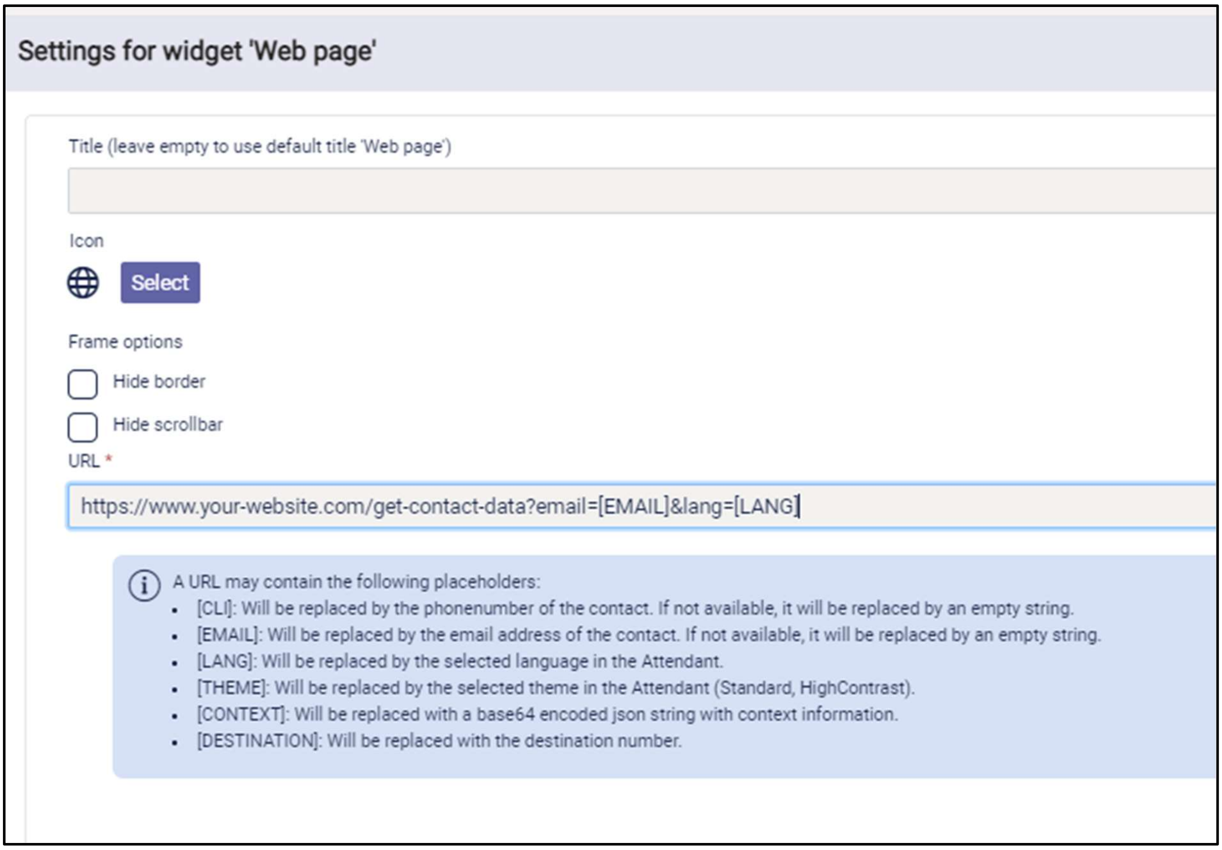
10.4.6 Twitter widget

This widget shows the timeline of a Twitter user. The Twitter widget can be added to the homepage. In the configuration of the widget, the Twitter screen name has to be entered. This can be only the screen name, the screen name preceded by '@' or the Twitter URL. These will all be converted into the screen name.

10.4.7 Web Page widget

By inserting a Web Page widget, you can embed an external website into the Attendant. For example, a page of a corporate website. This feature is only available in the Premium edition.

When inserting the Web Page widget, you can enter a URL of the page to embed:



In the frame options, it can be configured whether the border of the widget and/or the scrollbar of the page should be visible.

Technical notes:

- The URL is mandatory. When you enter a url without a prefix ('http://', 'https://', or 'ftp://'), the prefix 'https://' will be added automatically when you save the configuration.
- The URL can contain the placeholders [EMAIL] and [LANG]. The placeholders are described in paragraph "URL placeholders for widgets" at the end of this chapter.
- Not all websites can be run in the web page widget, which is actually a <iframe> element. Not all websites allow this. Some websites have an X-frame-options set to any of the following values:
    - **deny**: The website is not allowed to run in an <iframe>.
    - **sameorigin:** The website can only be run in an <iframe> when they both have the same origin (domain)
    - **allow-from <uri>:** The website is only allowed to be run in an <iframe> by a website that is run from a specific uri.

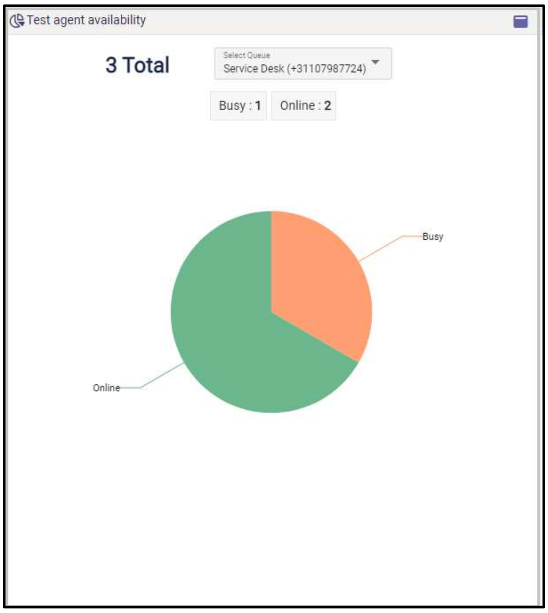
The web page that is shown in the widget can be opened in a new window, using the  button

10.4.8 Agent Availability widget

This widget shows the available agents for the selected monitored queue.

Upon login, an agent will be marked as 'online' for all the queues that agent is currently monitoring. When an agent is part of a conversation he will be marked as 'busy'. When an agent logs out or closes the application, they no longer participate in that monitored queue and therefore will no longer be visible in the agent availability metrics.

On the widget itself a monitored queue can be selected.
Multiple widgets can be added to display data for different monitored queues.



10.4.9 Call statistics widget

This widget shows a summary of the call statistics for the selected monitored queue for the current day

The following information will be visible;

Total calls: Total number of incoming calls

Abandoned rate: The percentage of abandoned incoming calls in relation to incoming calls that weren't picked up by an agent.

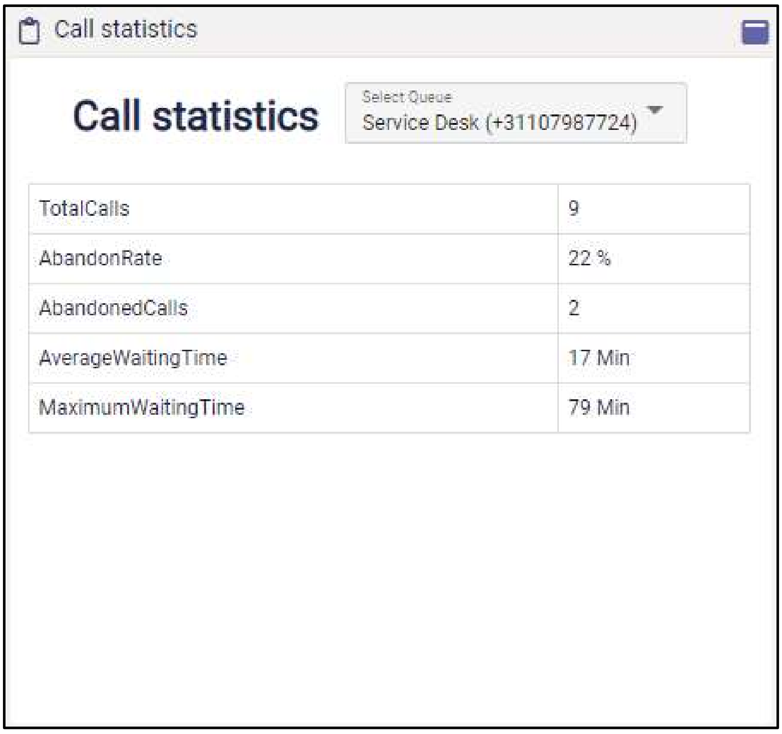
Abandoned calls: The total number of abandoned incoming calls.

Average waiting time: The average time a caller had to wait before the call was answered by an agent.

Maximum waiting time: Maximum waiting time a caller had to wait before the call was answered by an agent.

Please note that the statistics will be reset at midnight!

On the widget itself a monitored queue can be selected.
Multiple widgets can be added to display data for different monitored queues.


Call statistics
Call statistics
Select Queue
Service Desk (+31107987724)
TotalCalls
9
AbandonRate
22 %
AbandonedCalls
2
AverageWaitingTime
17 Min
MaximumWaitingTime
79 Min

11 Help function

Via the main menu you can open the Help popup:

11.1 Attendant version

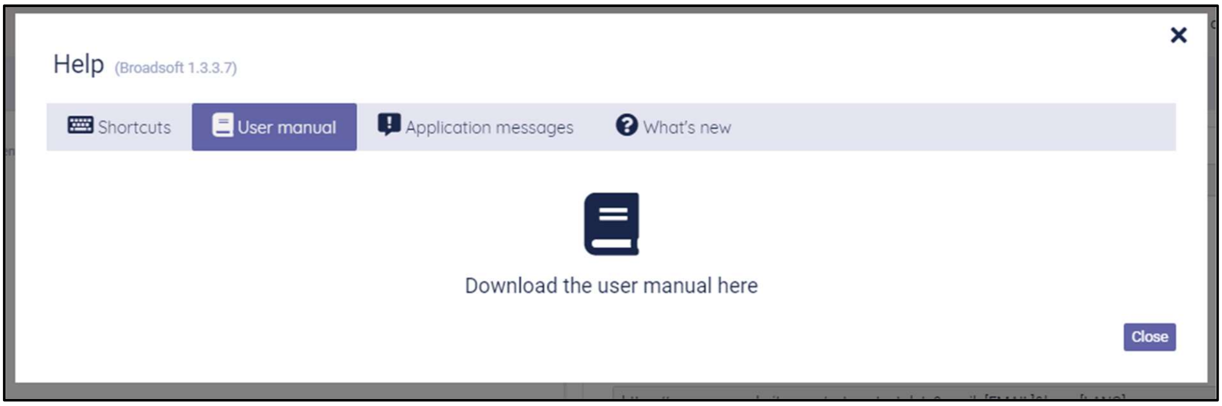
In the title of the Help popup, the current version of the Attendant is mentioned.

11.2 Keyboard shortcuts

The first tab page of the Help menu describes the keyboard shortcuts, as described in the chapter about Keyboard navigation.

11.3 User Manual

On tab page 'User Manual' of the Help menu you can download the user manual.

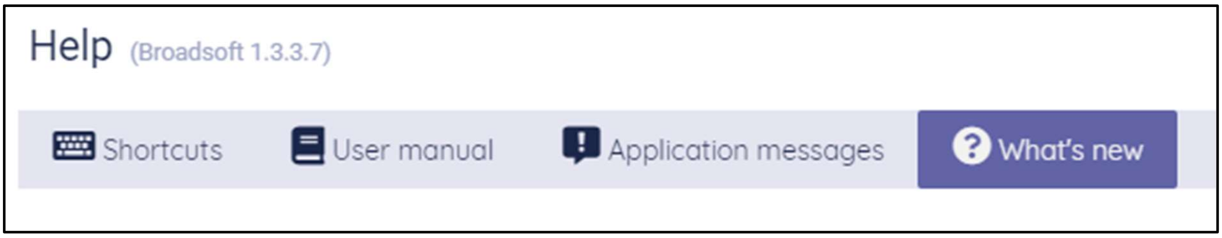


11.4 Application messages

On the tab 'Application messages' all toast messages are listed. The notifications can be copied with the 'Copy' button.

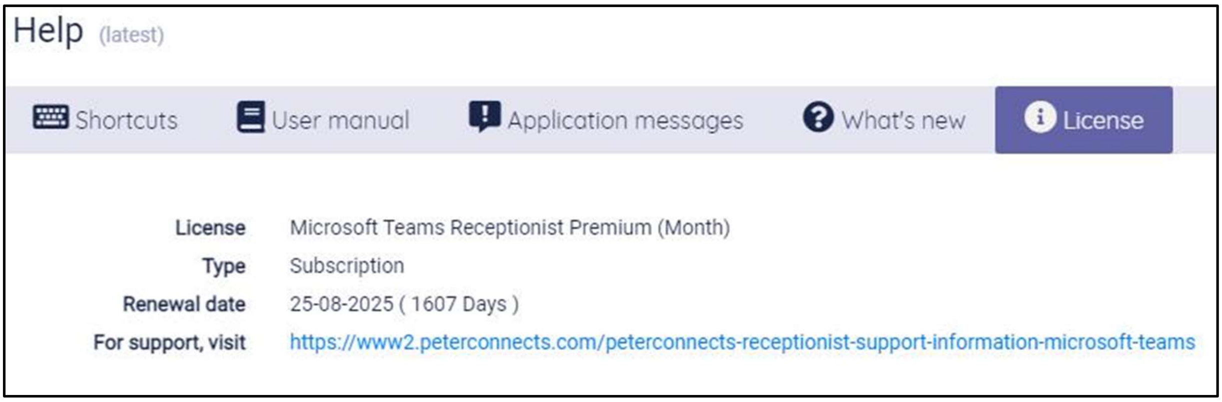
11.5 What's new

On the tab 'What's new', new features of the application are mentioned, belonging to the version of the application you are using. When you open the application with that version for the first time, the 'What's new' tab will automatically be shown.



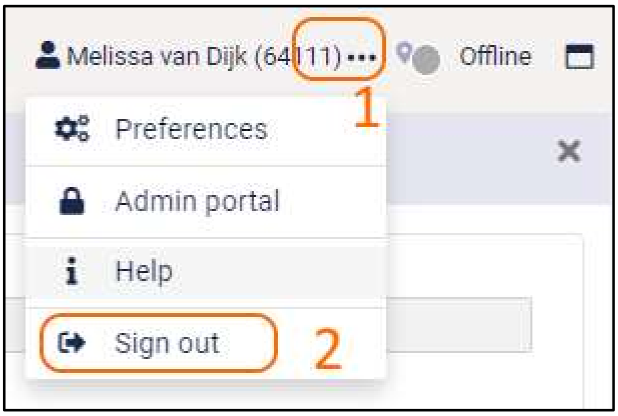
11.6 License

On tab page 'License' you can view your license information.



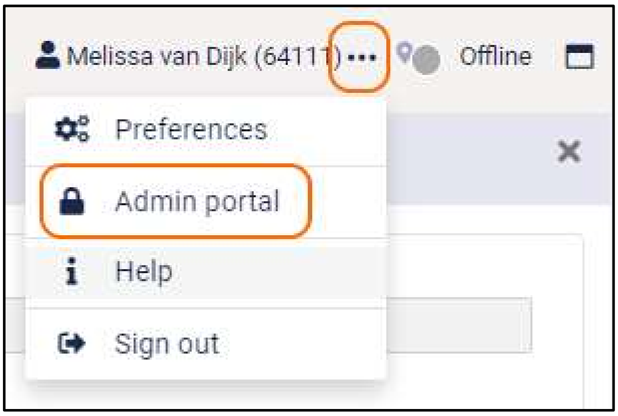
12 Sign out

When you open the main menu (1), there is a menu item to sign out (2). If you click this item, you will be logged out of the Attendant. You will not be asked for a confirmation.



13 Global configuration

If you are permitted to edit the global configuration, you can go to the Admin Portal via the main menu:



In the Admin portal, you can enter some central configuration for the application. This configuration applies to all users of the Attendant. The following paragraphs describe the configuration, that can be made.

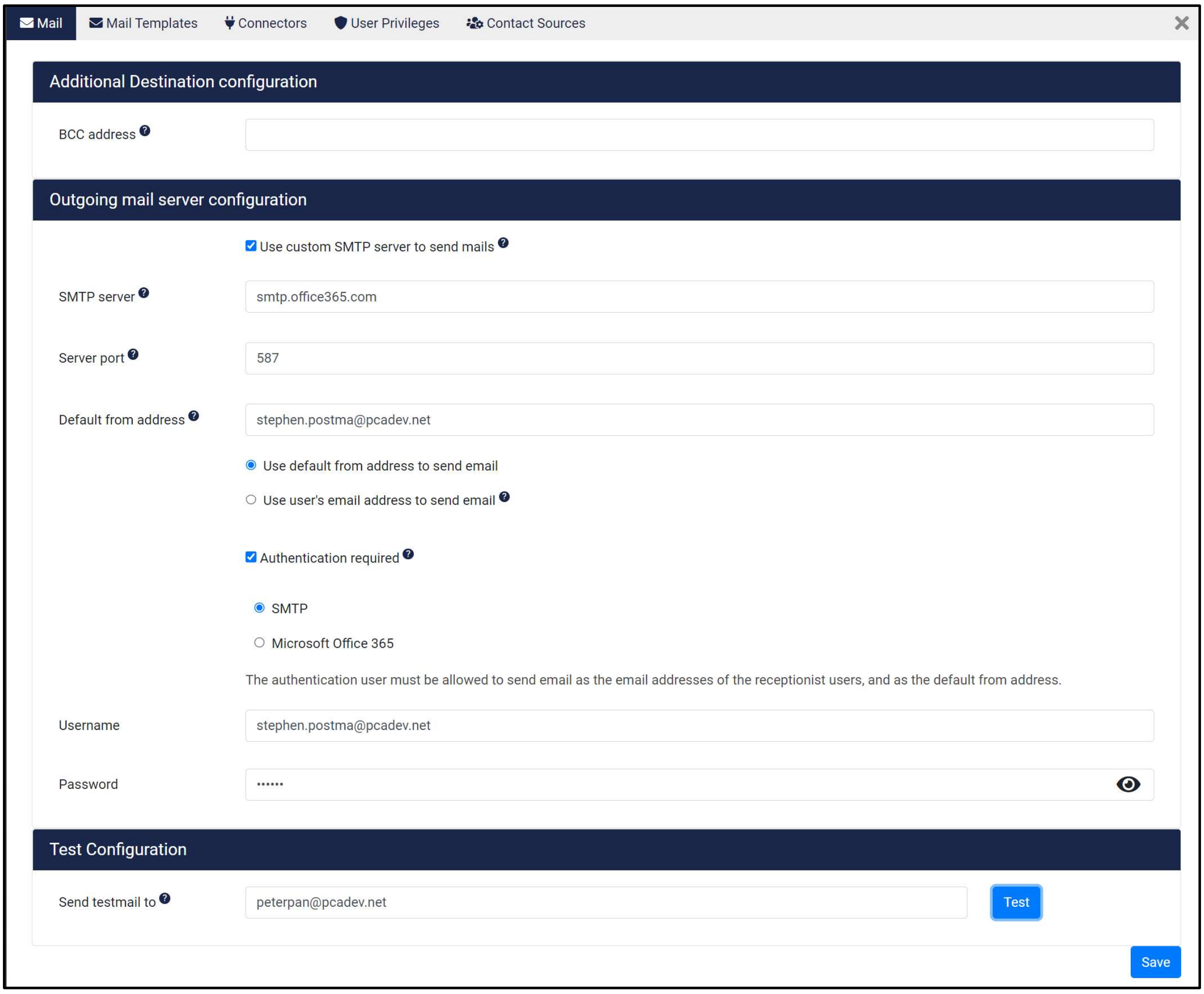
13.1 Mail

In the Attendant, the user can send a message to one of the contacts, for example to leave messages that there was a call for that contact. This functionality works with a default setting.

You can add 1 or more additional destinations to which the e-mail is being sent as a blind copy (Bcc). This can be done on the tab Mail of the Admin portal.

You can customize the e-mail configuration to work with your SMTP server by configuring this in the Admin portal. This can also be done on the tab Mail.

13.1.1 SMTP Authentication



The following settings can be made:

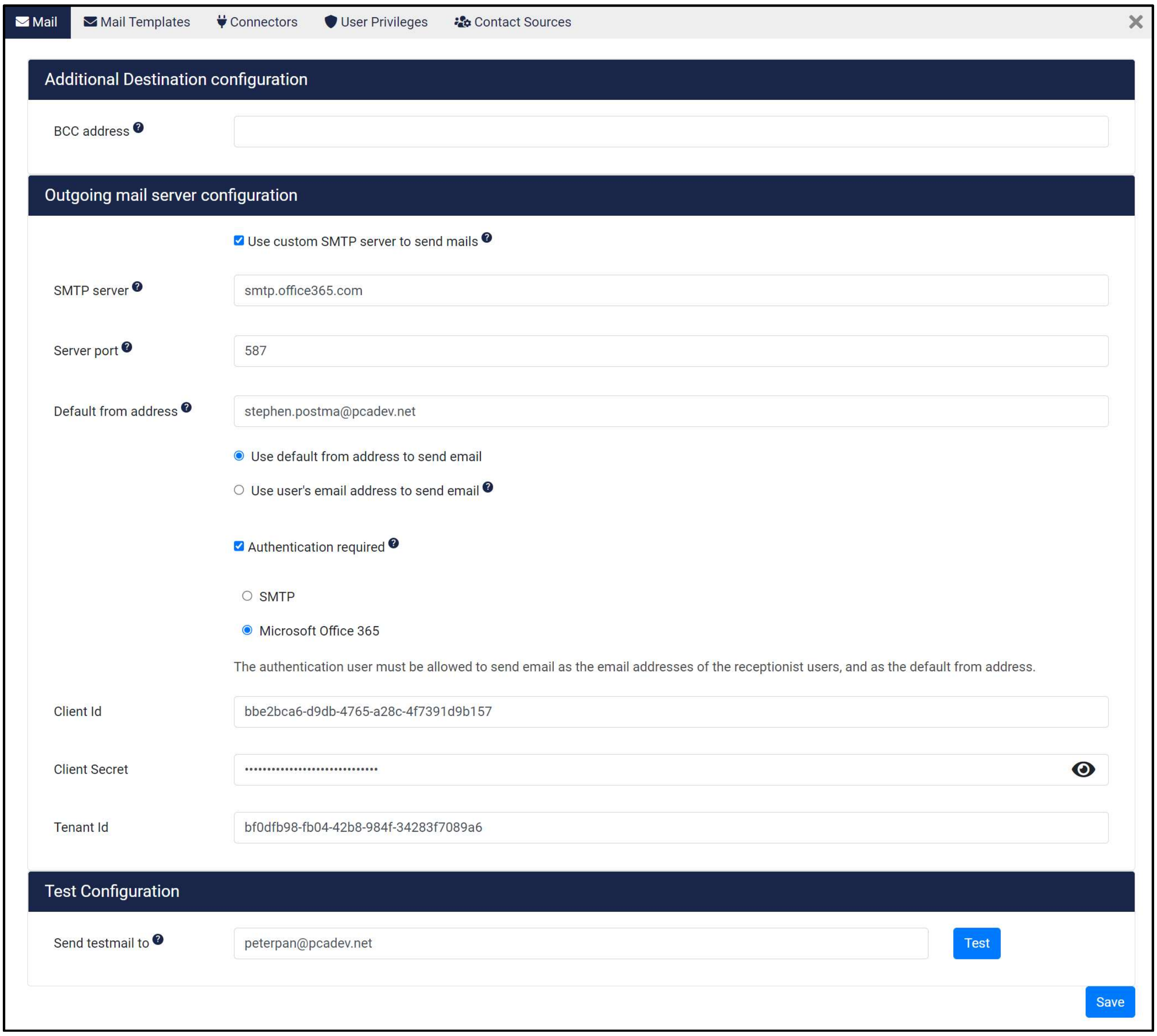
- **Use custom SMTP server to send mails:** When this checkbox is checked, the configured settings will be used for sending mail.
- **SMTP server:** The name of the SMTP server that should send the mail.
- **Server port:** The port number of the SMTP server.
- **Default from address:** The email address that will be used for sending the emails, if the email address of the Attendant user has not been configured.
- **Authentication required:** If the SMTP server requires authentication, you can check this checkbox to enable the fields where you can enter the credentials.
- **SMTP:** When selected, the authentication type SMTP will be used for sending mail.
- **Username:** The username that will be used for sending mail via the configured SMTP server.
- **Password:** The password that will be used for sending mail via the configured SMTP server.
- **Send test mail to:** Enter a valid email address to verify the configuration.

You can test your settings by clicking on the button “Test” and save your changes using the button “Save”.

After setting the custom SMTP, the users need to login into the Attendant again in order to see the new settings.

In case you also configured additional destination(s) these will also be used when sending e-mails using the custom SMTP settings.

13.1.2 Microsoft Office 365 Authentication



The following settings can be made:

- **Use custom SMTP server to send mails:** When this checkbox is checked, the configured settings will be used for sending mail.
- **SMTP server:** The name of the SMTP server that should send the mail.
- **Server port:** The port number of the SMTP server.
- **Default from address:** The email address that will be used for sending the emails, if the email address of the Attendant user has not been configured.
- **Authentication required:** If the Mail server requires authentication, you can check this checkbox to enable the fields where you can enter the credentials.
- **Microsoft Office 365:** When selected, the authentication type Microsoft Office 365 will be used for sending mail.

- **Client Id:** The client Id that will be used for sending mail via the configured Mail server.
- **Client Secret:** The client secret that will be used for sending mail via the configured Mail server.
- **Tenant Id:** The tenant Id that will be used for sending mail via the configured Mail server.
- **Send test mail to:** Enter a valid email address to verify the configuration.

You can test your settings by clicking on the button “Test” and save your changes using the button “Save”.

After setting the custom Mail server, the users need to login into the Attendant again in order to see the new settings.

In case you also configured additional destination(s) these will also be used when sending e-mails using the custom Mail settings.

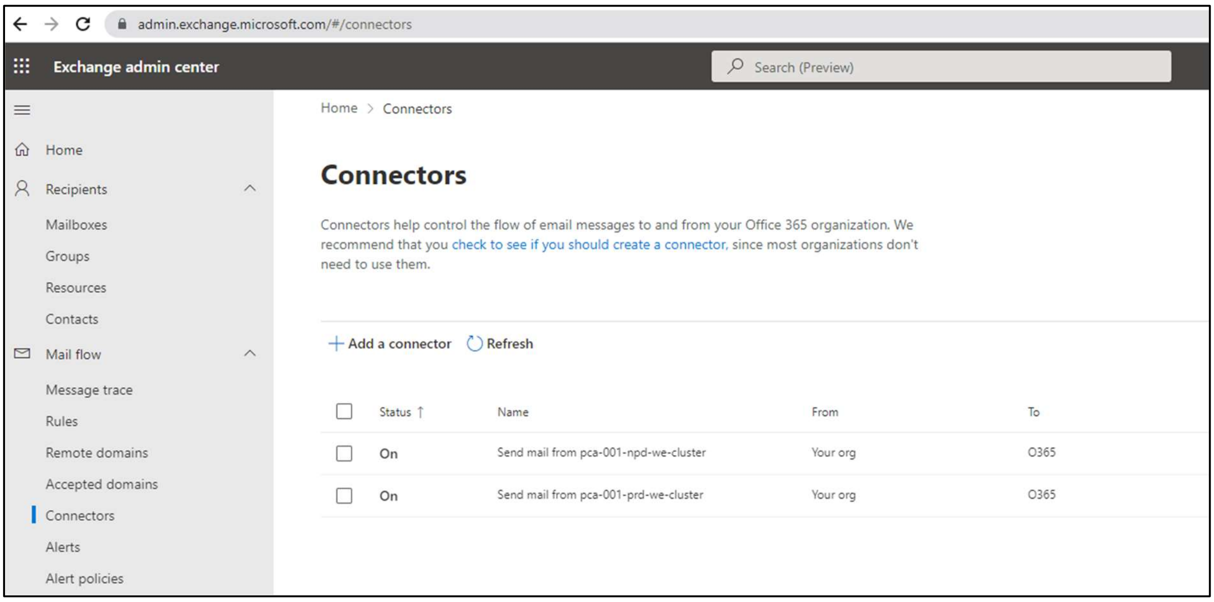
Important:

When using the Microsoft Office365 Authentication, following Permission are required for the related Enterprise application:

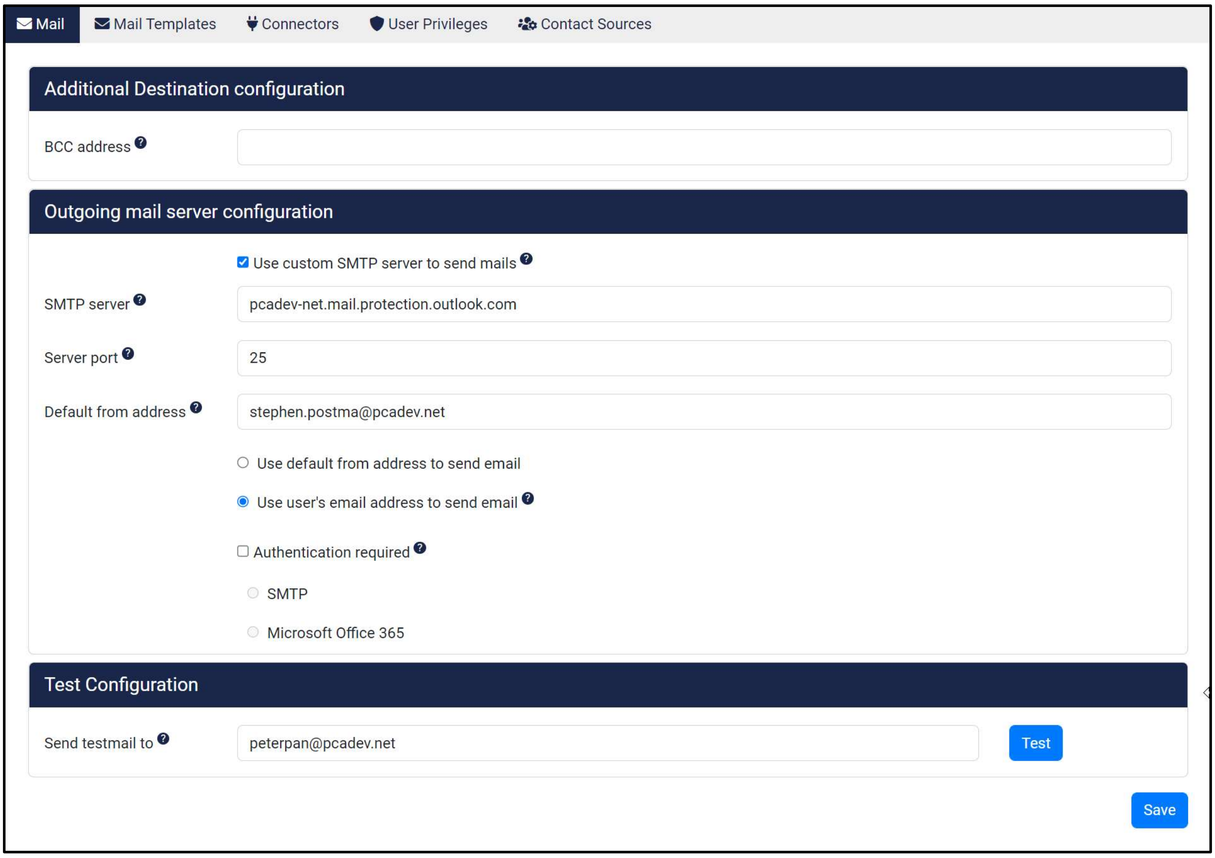
- Sign in and read user profile;
- Read all users’ full profiles;
- Send mail as any user.

13.1.3 Without Authentication

To be able to send mail without authentication, it first needs to create a connector in the tenant you want to use.

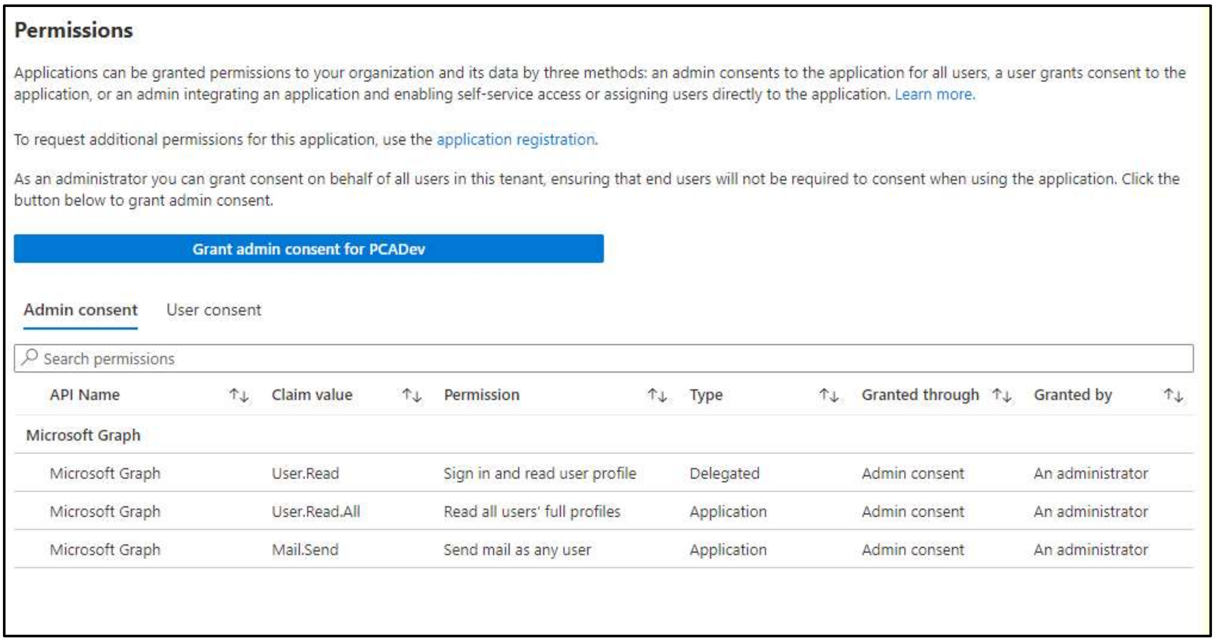


Then set the settings in admin portal:



The following settings can be made:

- **Use custom SMTP server to send mails:** When this checkbox is checked, the configured settings will be used for sending mail.
- **SMTP server:** The name of the SMTP server that should send the mail, use the specific DNS for the tenant.
- **Server port:** The port number of the SMTP server.
- **Default from address:** The email address that will be used for sending the emails, if the email address of the Attendant user has not been configured.

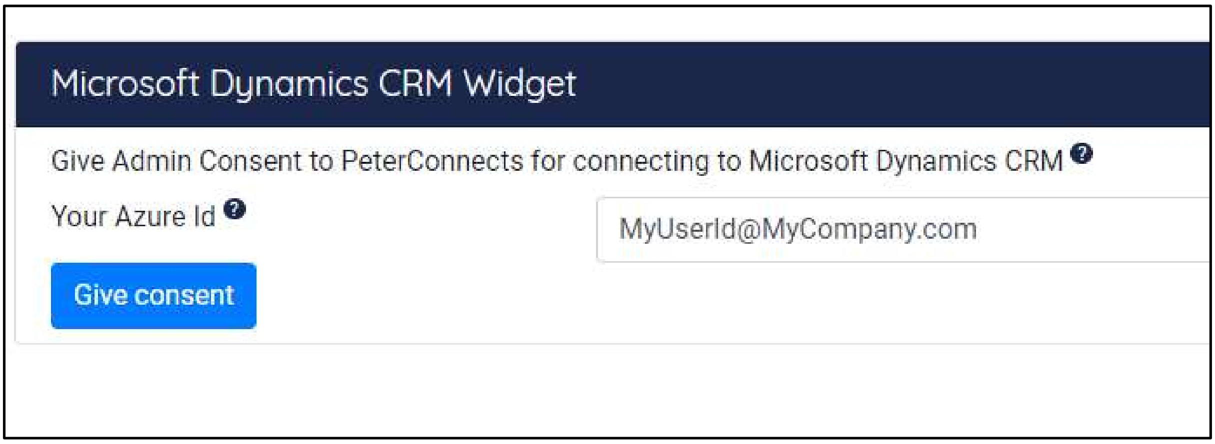


13.2 Connectors

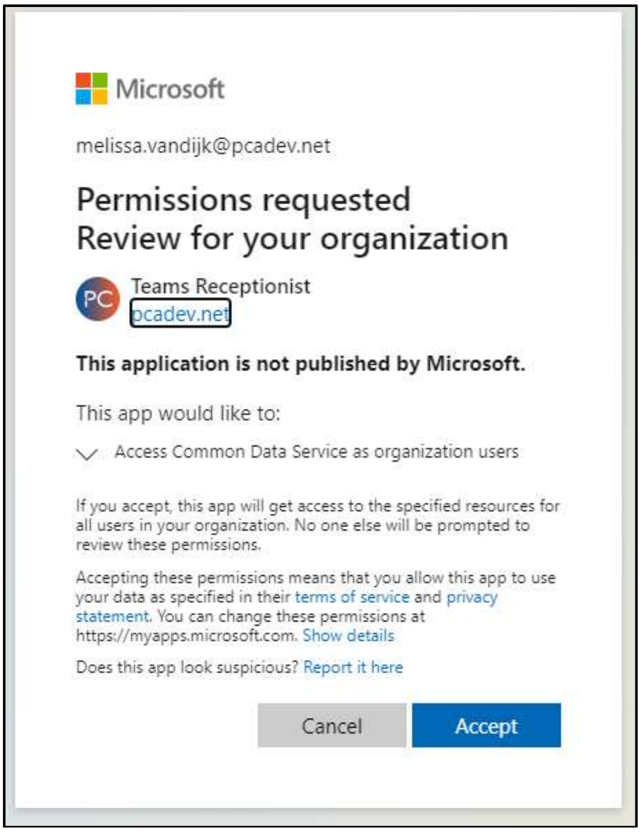
13.2.1 Microsoft Dynamics CRM

On the tab page ‘Connectors’ you can give admin consent, so the users in your company can connect to the Microsoft Dynamics CRM from the Attendant.

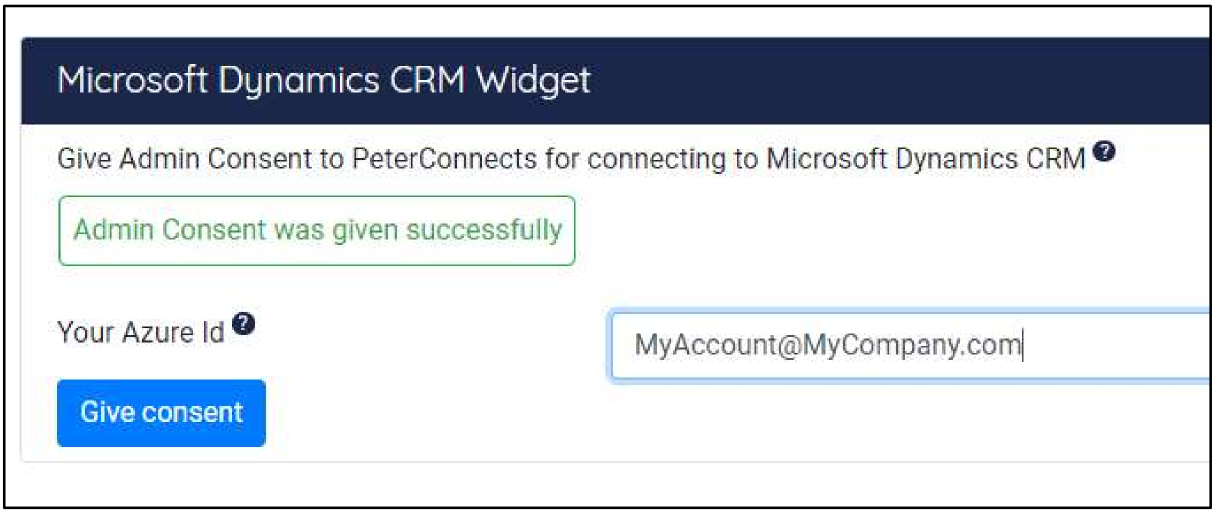
Admin consent can be given as follows:
You can fill in your Azure Id. This Azure account should have administrator rights.



When you click on button “Give consent”, you will be redirected to a page where you can give consent. It might be that you first have to sign in or select with which account you want to give consent. The page where you are redirected looks like this:



After you click on button "Accept" you will be redirected back to the Admin Portal. If all went well, you will see a green confirmation that the consent was given successfully.



If something went wrong, you will see a red error message with a description what went wrong.

13.2.2 ACS connection string

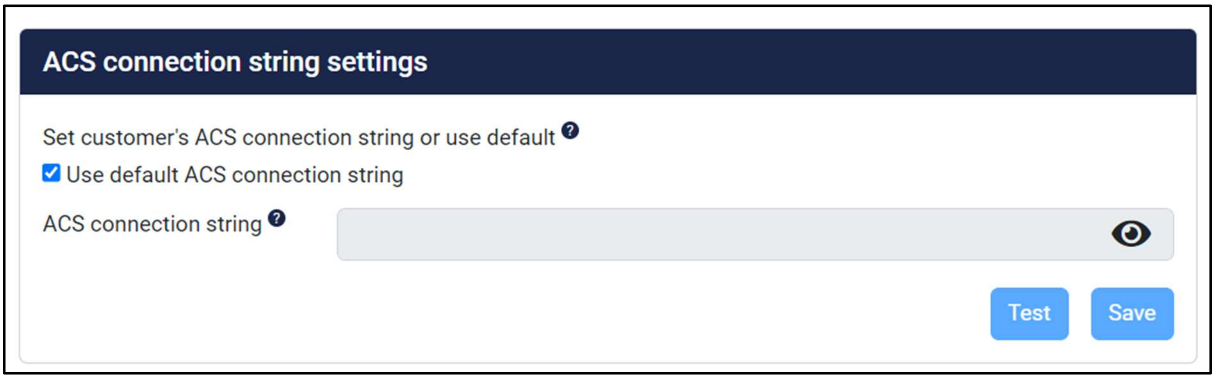
On the tab page 'Connectors' you can configure the ACS connection string.

The first the step before using ACS is to grant consent to the Attendant Console application.
[Consent to Attendant Console permissions](#)

Second, a connection string needs to be set in the Admin portal. This connection string needs to be created in Azure according the instructions by Microsoft, see: [Create and manage resources in Azure Communication Services](#)

Note: a connection string starts with `endpoint=`, then contains a URL followed by a semicolon and an access key.

To set the connection string, first deselect the “Use default ACS connection string” and then copy the created connection string from Azure into the ACS connection string input field.



Before saving, the settings can be tested by pressing the Test-button. A green popup will be shown if the test succeeds.
Press the Save-button to store the new settings.

13.3 Call Queue

13.3.1 Call settings

On the top of the tab page ‘Call Queue’ you can configure general call settings.

Update the settings by setting the new values and press the ‘Save’ button to save the changes.

13.3.1.1 Configure the Rejoin Timeout

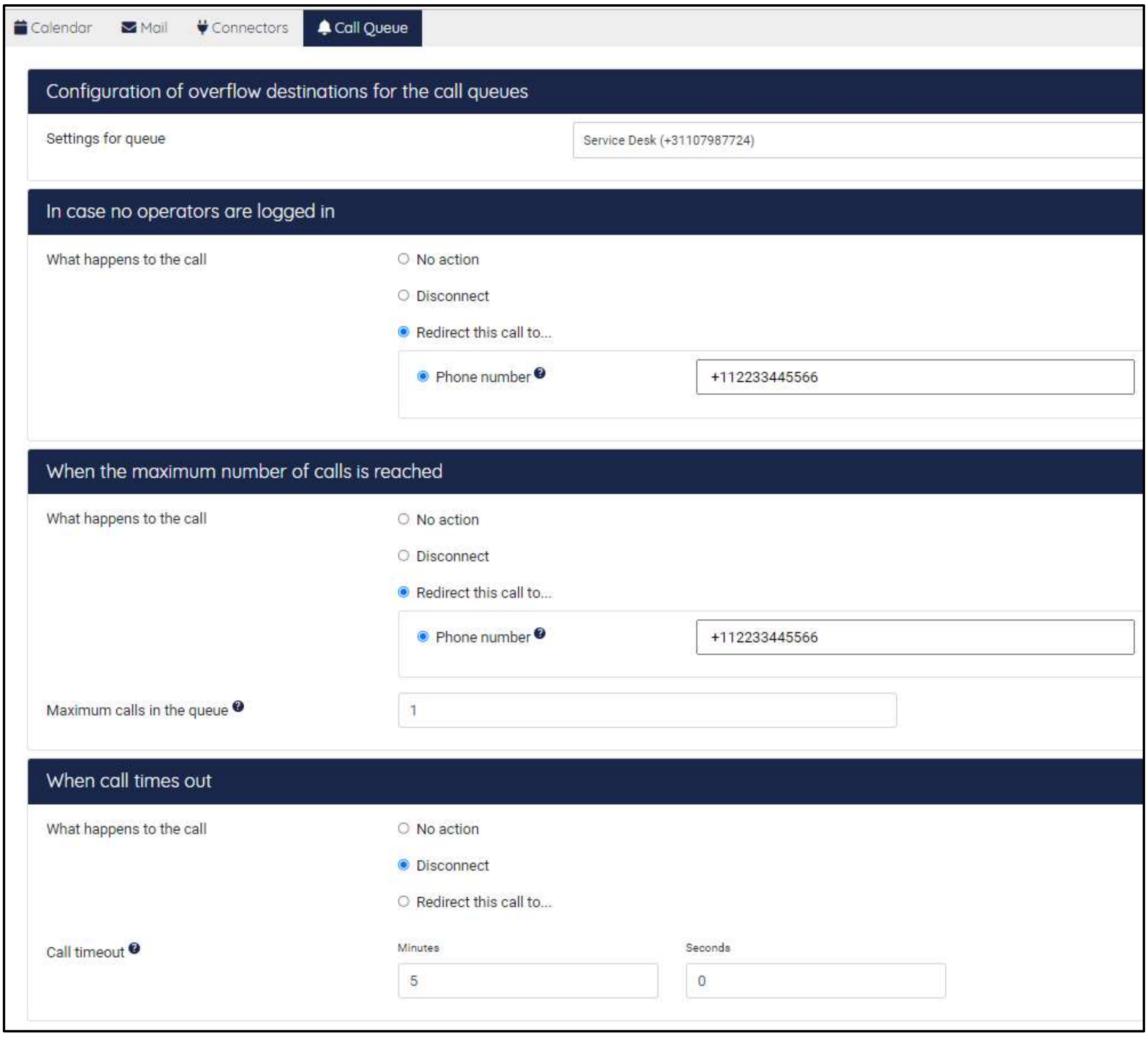
Configure what happens when an attendant leaves the Teams call. If you set it to a positive number of seconds, the call will still be displayed in the receptionist for that number of seconds before disappearing. This gives the receptionist the option to rejoin the call after leaving.

Set it to 0 or a negative number of seconds to make the call disappear in the receptionist right away after the attendant leaves the Teams call.

13.3.2 Overflow handling for call queues

On tab page 'Call Queue' you can configure the overflow handling. An action can be configured for each queue when:

- no operator is logged in that is monitoring the queue
- the specified maximum number of calls has been reached
- a specified timeout has been reached



First you select a queue in the drop down 'Settings for queue'. After that, the options for the action:

- in case no operators are logged in
- when the maximum number of calls has been reached
- when a call times out

can be configured.

13.3.2.1 Configure an action when no operators are logged in

In case no operator is logged in that is monitoring the queue, call can be redirected to ensure calls do not get lost.
You can select an action (default is 'no action'):

- No Action, which means call keeps on ringing.
- Disconnect, which means call is hang up.
- Redirect the call to another destination, this can be phone number or a Teams contact.

13.3.2.2 Configure an action when the maximum number of calls has been reached

In case the maximum number of call is exceeding the configured value for a queue, the call can be redirected.
You can select an action (default is 'no action'):

- No Action, this means this overflow rule is not active.
- Disconnect, which means the call is hang up.
- Redirect the call to another destination, this can be phone number or a Teams contact.

After selecting an action, the maximum calls in the queue field becomes editable and you can fill in a number.
Maximum number is 200.

13.3.2.3 Configure an action when call times out

In case a call is too long in the queue it can be redirected.
You can select an action (default is 'no action'):

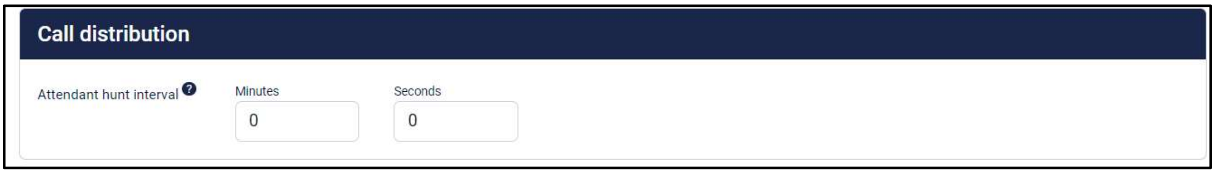
- No Action, this means this overflow rule is not active.
- Disconnect, which means the call is hang up after the configured time it is ringing in the queue
- Redirect the call to another destination, this can be phone number or a Teams contact.

After selecting an action, the call time out fields become editable and you can fill in minutes and seconds.
Maximum time out is 45 minutes.

13.3.3 Call distribution settings for call queues

On tab page 'Call Queue' you can change settings related to call distribution for joined queues.

First you select a queue in the drop down 'Settings for queue'. Beneath the queue overflow-settings there is a section to configure the call distribution settings.



13.3.3.1 Configure attendant hunt interval

By default, when a call comes in the queue, it starts hunting for available attendants. If it doesn't succeed it will not start hunting again.
The attendant hunt interval can be set to start hunting again after the specified interval has elapsed. It will keep hunting every time the interval elapses until the call is picked up or ended.
To disable the attendant hunt interval, set both minutes and seconds to 0. It will revert to the default behavior of only hunting for available attendants when the call comes into the queue.

13.4 Specific configuration in tenant

To be able to do calling actions and use queues in the receptionist, consent must be given for the calling application and queue endpoints must be created in the tenant. For a guide on how to do this, a separate walkthrough is available at https://product.attendant.anywhere365.io/configuration-attendant-console

13.5 User privileges via Admin portal

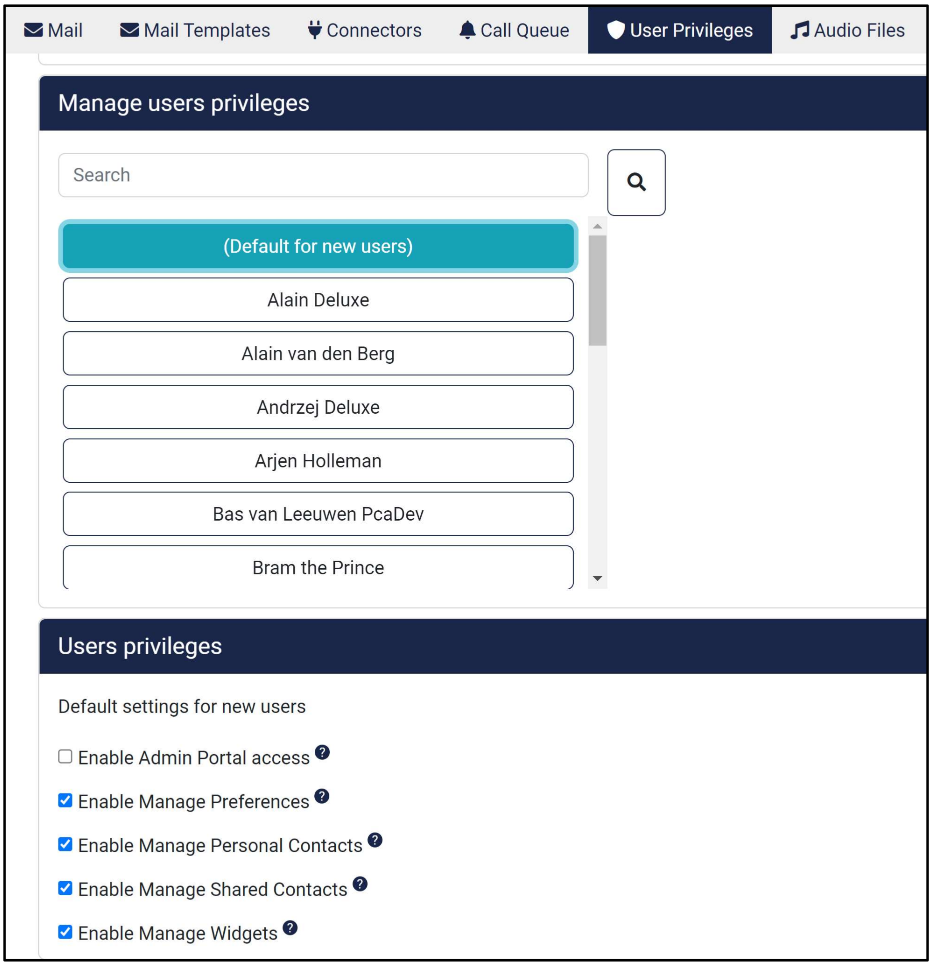
On tab page 'User Privileges' you can configure for all users the access to

- Admin Portal
- Add/edit/delete Personal contacts
- Add/edit/delete Shared contacts.
- Manage the Preferences
- Add/edit/remove Widgets

You can also configure the default settings for new users.

13.5.1 Setting user privileges for default user

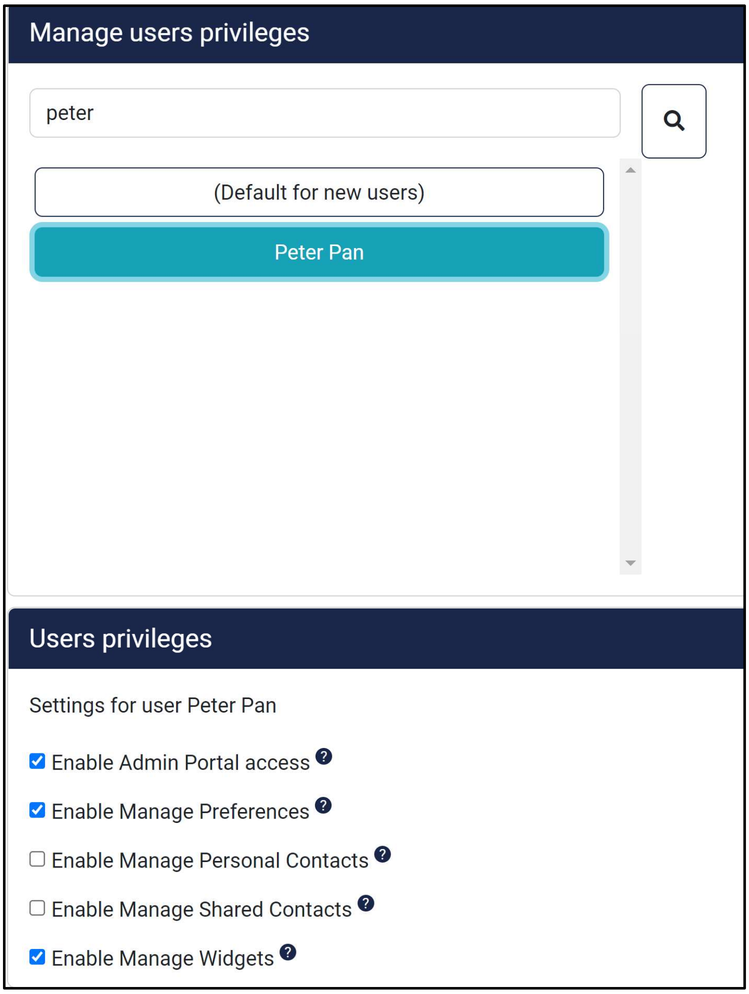
With the '(Default for new users)', it is possible set the default for new users. For example: When the 'Enable Admin Portal access' and Enable manage widgets is unchecked, all new users do not get Admin Portal and manage widget access, they only get manage preferences, manage personal contacts and manage shared contacts.



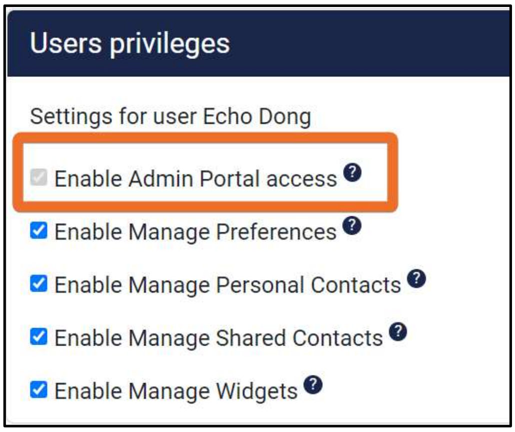
13.5.2 Setting user privileges for specific users

On tab page 'User Privileges' you can also configure the privileges for individual users.

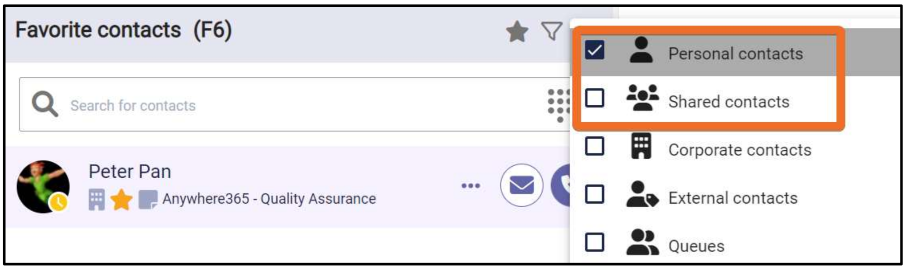
When searching for a specific user, the privileges for this individual user can be set specifically for this user.



Remark: A user cannot remove the Admin Portal access for his/her own account. This is shown with a greyed-out checkbox.



Remark: When manage Personal and/or Shared contacts is disabled for a user, the selected user cannot manage (create, edit or delete) Personal and/or Shared contacts. The user can, however, still view Personal and/or Shared contacts and use them as a filter.

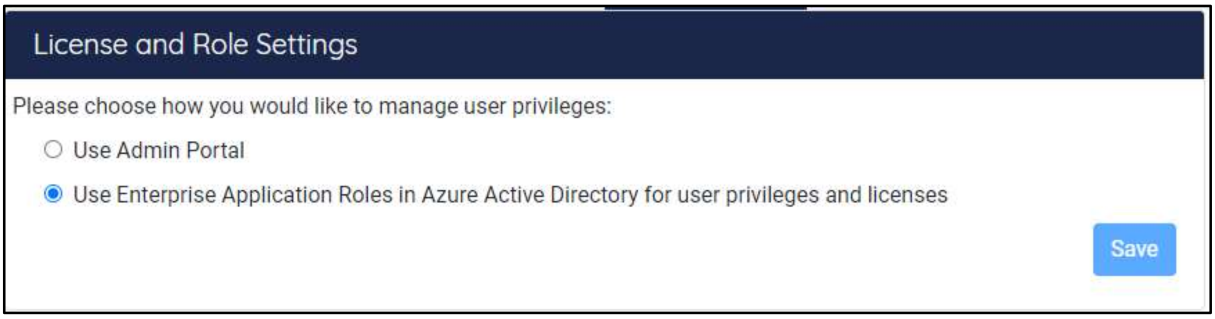


13.6 License and User privileges via AAD

On tab page 'User Privileges' you can configure user privileges. There are 2 ways to configure these privileges. One "Use Admin Portal", which means the user privileges can be managed on the user privileges page. User privileges configuration via the Admin Portal was described in the previous section.

The other option is to use the Enterprise Application Roles in Azure Active Directory both for user privileges and licenses. This is described in the section.

In order to switch to License and Role Setting via Azure Active Directory, select the corresponding radio button:



Note that for Use Enterprise Application Roles, the *Save* button is initially disabled until synchronization of the license assignment succeeded. This is described below. Once the button is active, the configuration can be saved.

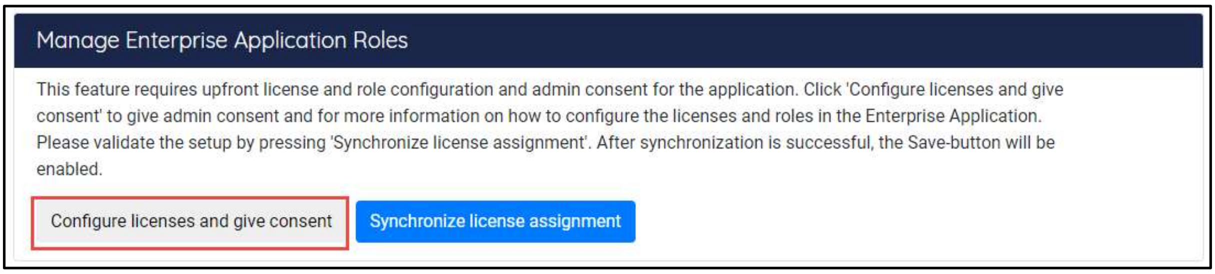
13.6.1 Enterprise Application Roles in Azure Active Directory

When this option is selected, both licenses and user privileges are configured via the Enterprise Application Roles in Azure Active Directory.

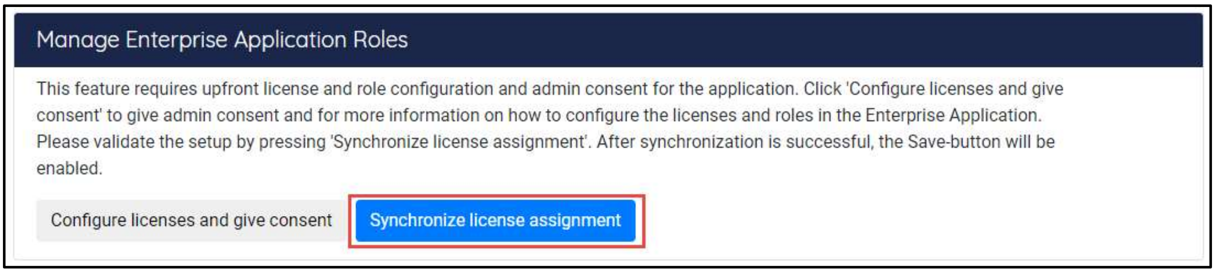
Before enabling this feature, it is important to give admin consent for license synchronization and to configure the licenses and roles.

If no licenses are assigned while the settings are saved, nobody will be able to login to the application. Furthermore, it is also important to assign the Attendant Administrator role to yourself and other administrators to keep access to the Admin Portal.

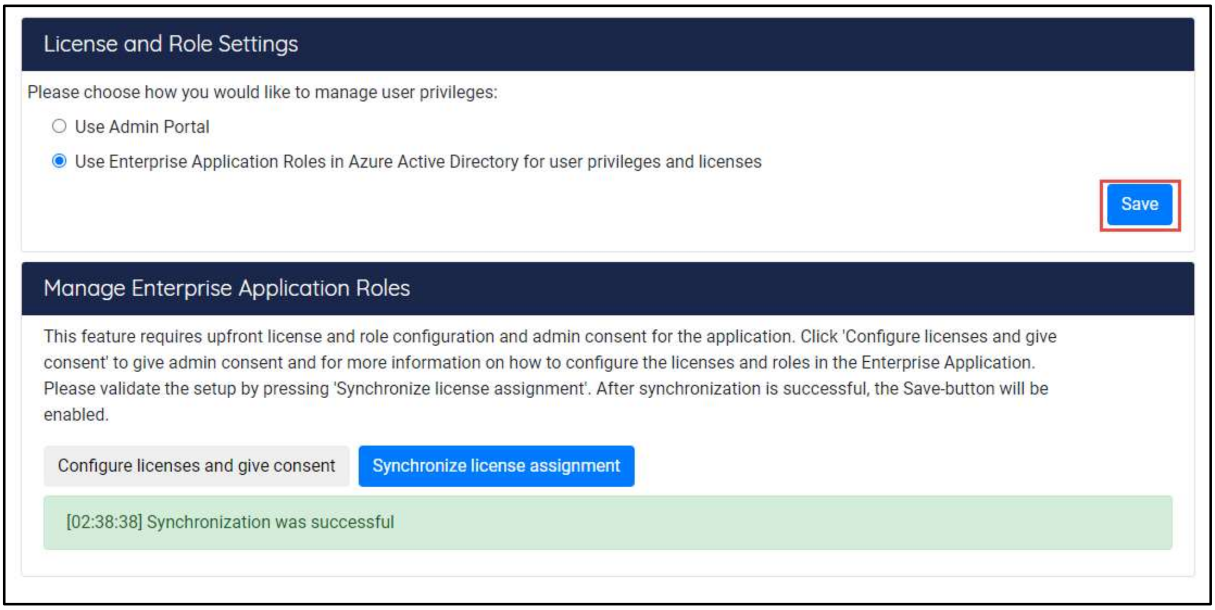
To give admin consent and more information about configuring licenses and roles in Azure, please click the button *Configure licenses and give consent*.



Please validate that synchronization is working by clicking the button *Synchronize license assignment*. If it is successful, the *Save* button under License and Role Settings will be enabled to save the new settings.



Again: Before you press the Save button, make sure the that at least a license for the logged in user is available and at least one admin portal role is assigned. Read the next two sections before you actually do the Save action.

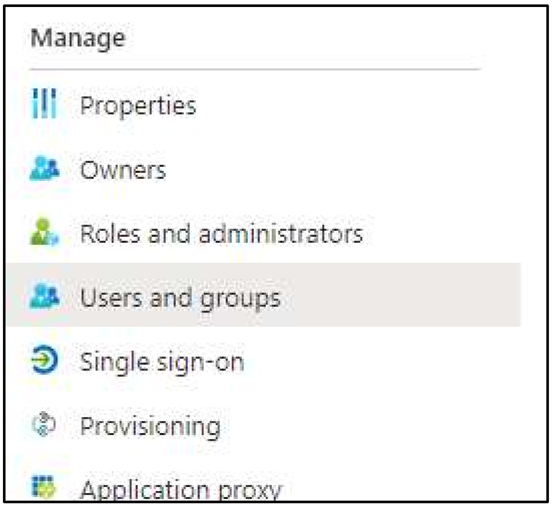


Synchronization will only work when admin consent has been given. It will not validate for correctly assigned licenses and roles. How to do that is described in the two sections below.

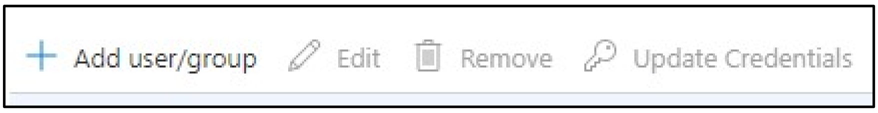
13.6.2 Manage license assignment via Enterprise Application Roles

To assign licenses, you will need to go to the Users and Groups page of the Enterprise Application. To get here, open the browser to the Azure Portal and click on *Azure Active Directory*. Then click on *Enterprise Applications* and select the Attendant application.

From there, select the *Users and groups* option in the left menu.



On the top of the screen there is an *Add user/group* button. Click this to get an interface where you can select multiple users and assign it a role. To assign licenses to these users, please select the corresponding License role.



When a user tries to login it will try to use the assigned license if there is one available.

It is also possible to synchronize the licenses manually via the Admin Portal in the User Privileges tab by pressing the *Synchronize license assignment* button (see previous section)

13.6.3 Manage user privileges via Enterprise Application Roles

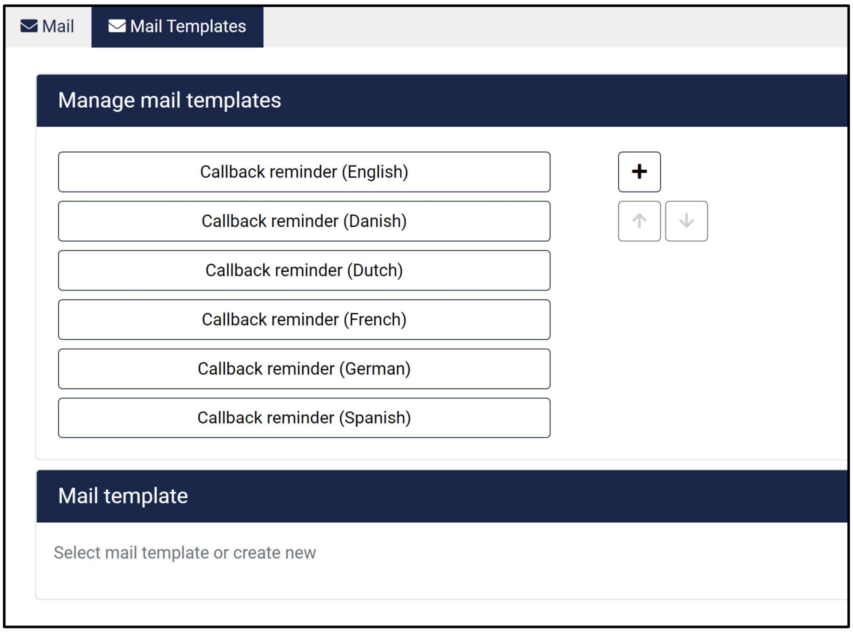
By default, all user privileges manageable in the Enterprise Application Roles are opt-out, except for the Attendant Administrator role. This means that users will have all the privileges by default. Functionality can be disabled for users by adding a role which will remove the selected user privilege. Changes to user privileges will be activated upon the next time the user logs in to the Attendant, given enough time for Azure to propagate the changes.

The following are available:

- Attendant License (must have role to be able to log in)
- Attendant Administrator (optional role, only for users that need Admin Portal access)
- No Personal Contacts (to *dis*able creating/editing/deleting Personal Contacts)
- No Group Contacts (to *dis*able creating/editing/deleting Group Contacts)
- No Preferences (to *dis*able Access to the Preferences Screen)
- No Edit Widgets (to *dis*able the option to add/edit/delete widgets in F3, F7 and F9)

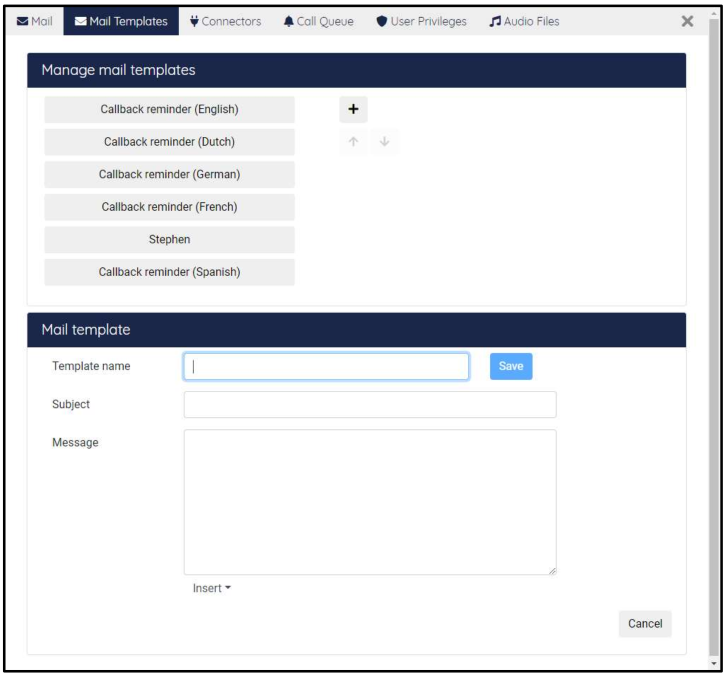
13.7 Maintain callback mail template

On tab page ‘Mail Templates’ you can configure mail templates used for call back e-mails. On the top half of the page, you see a list of mail templates. On the bottom half, you see the text to select a mail template or to create a new one.



13.7.1 Adding a new mail template

In the top half of the page click on the + sign to open the bottom part for entering a new mail template.



A mail template requires:

1. Template name, name of the template as it is shown to the user;
2. Subject, this line becomes the subject of the e-mail that is being sent;
3. Message: this contains the actual e-mail content. By using the insert drop down at the bottom the following fields can be inserted:
   - Name of caller;
   - Phone number of caller;
   - Date;
   - My mail address (e-mail address of the logged in user);
   - My name (name of logged in user);

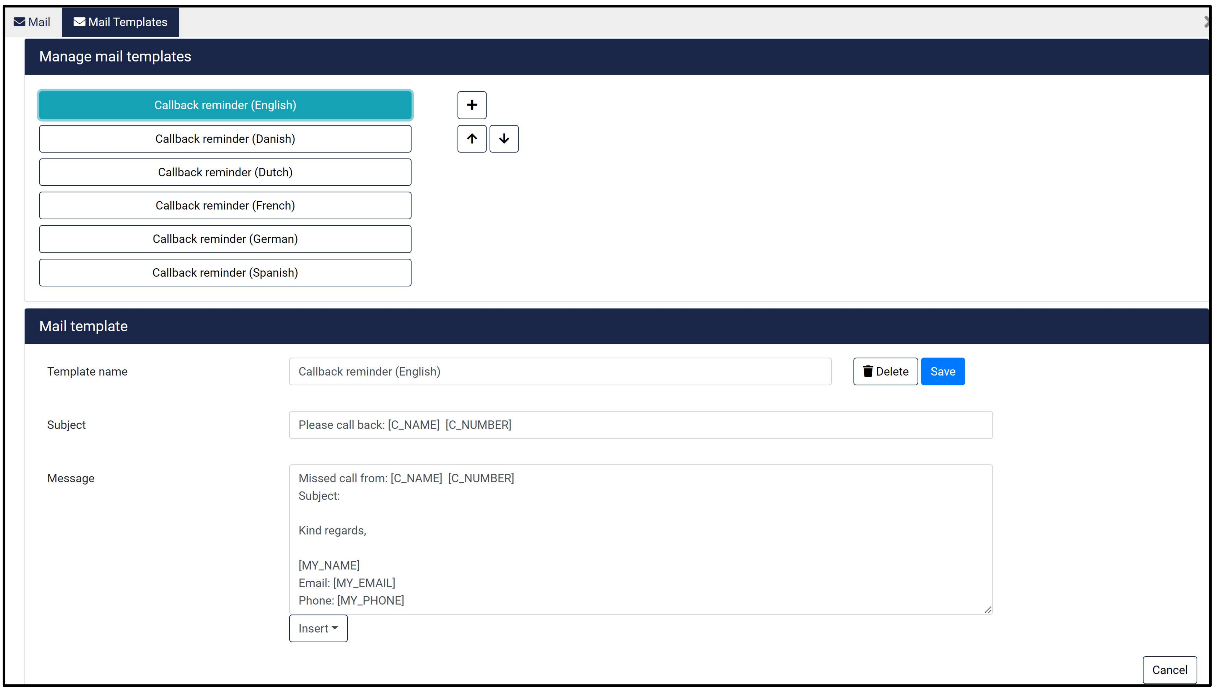
- My phonenumber.

Once the mail template is finished it can be stored by clicking the 'Save' button.

In case the mail template can be discarded, this can be done by clicking the 'Cancel' button.

13.7.2 Arranging the order of mail templates

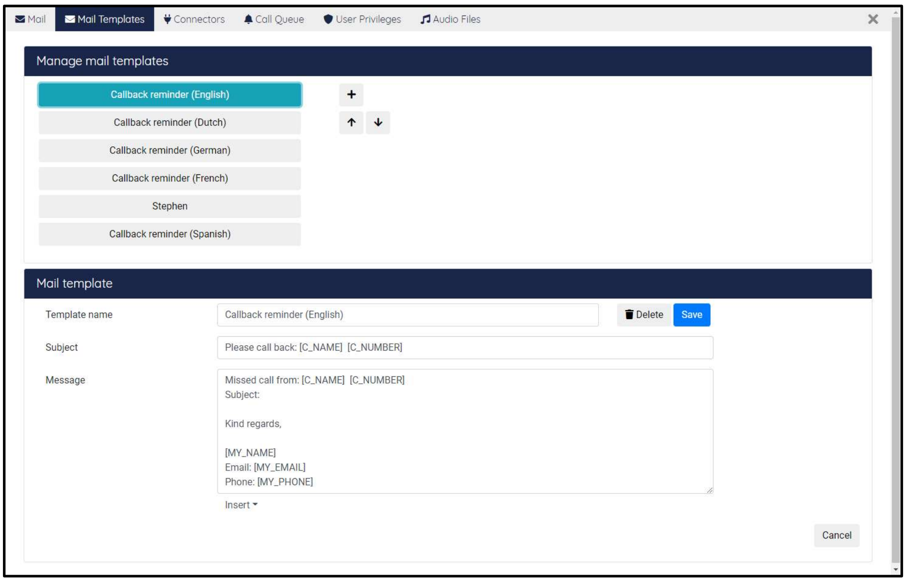
By selecting a mail template and clicking on the arrow up or arrow down button you can arrange the order of the mail templates. The mail templates are shown in this order when the user selects a mail template for sending a callback reminder e-mail.



13.7.3 Changing or deleting a mail template or creating a new one

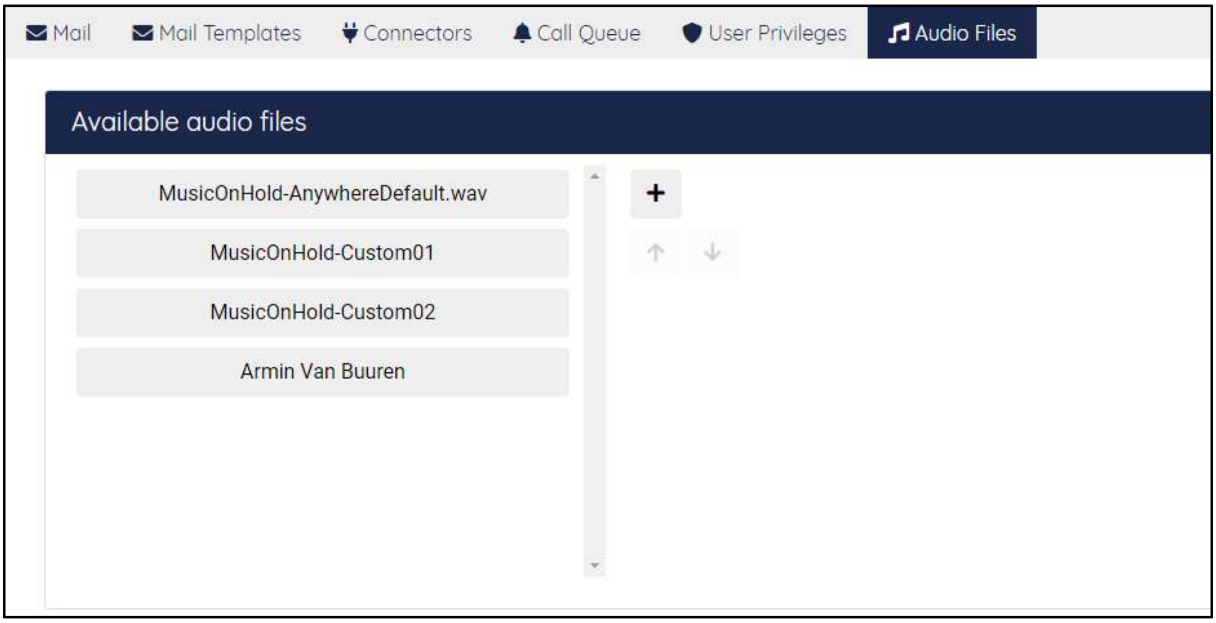
By selecting a mail template, the content of that mail template is shown in the bottom half of the screen. The user can change the content like with creating a new mail template and then press the 'Save' button.

By clicking the 'Delete' buttom a mail template that is obsolete can be deleted. The delete action has to be confirmed.



13.8 Music on hold

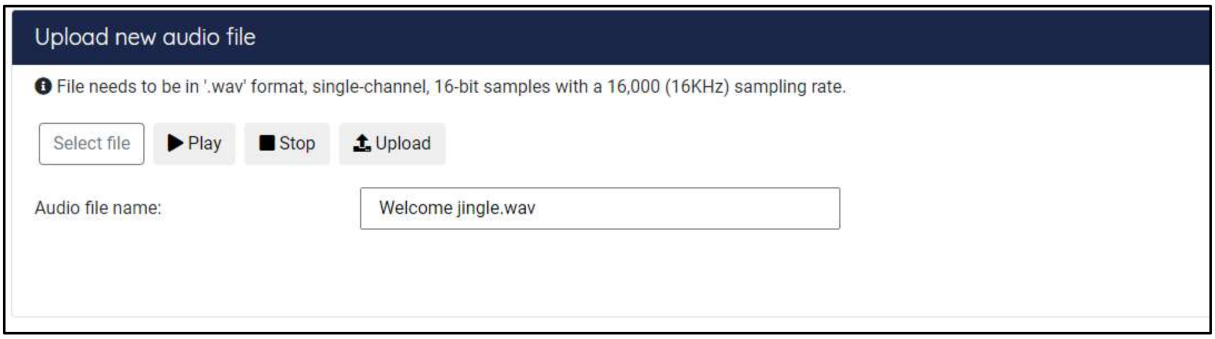
In the Admin Portal, under the tab ‘Audio Files’ the audio clips can be managed. These audio clips can be used as music on hold for queues.



A list of uploaded audio files is presented. You can change the order in which the audios appear by selecting a file and clicking the arrow buttons on the right.

13.8.1 Uploading own music on hold

By clicking the plus icon  next to the list of available audio files you can add your music or welcoming message. After clicking the button, a new section opens below where you can select a file from your local computer by clicking ‘Select file’. As displayed, the file has to be in wave format, single channel and 16-bit sample with a 16KHz sampling rate. Many online tools are available to help you to convert the file to the required format.



When you select the file, you can play (and stop) it and give it a name by which it will appear in the list of audio files. The file is only saved if you press ‘Upload’.
In case you do not want to ‘Upload’, you can click ‘Cancel’ and the bottom part is closed and nothing is saved

13.8.2 Managing music on hold files

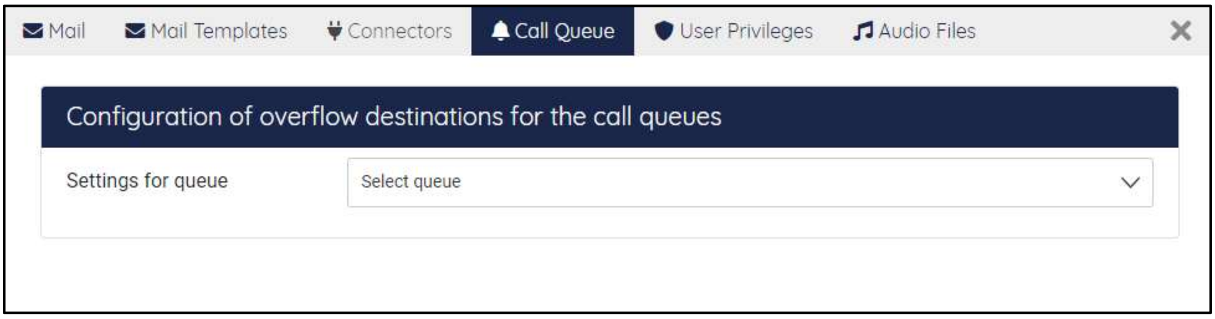
After clicking an audio file in the list, a new section opens up below that allows you to manage the audio files

In this section you can change the name of the file by updating the textbox and pressing "Rename". You can also play (and stop) or download the file. If the file is configured to play in any queues, a list of them is displayed below the buttons. You can only delete an audio file once you detached it from all queues as described in the next section.

13.8.3 Select music on hold for a queue.

In the Admin Portal on tab page 'Call Queue' you can configure the music that is played while the caller is in the queue and when the caller is on hold.

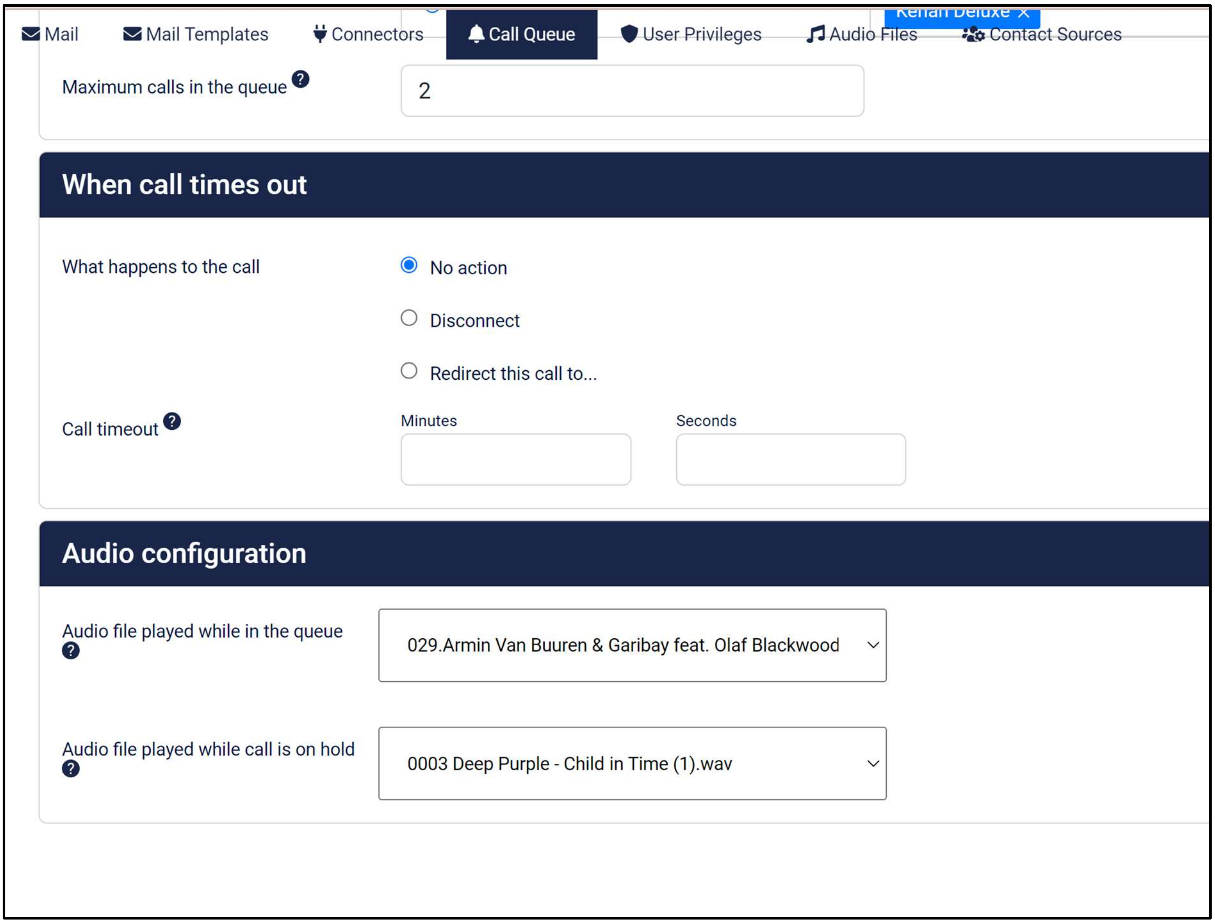
First select a queue for which you want to add an audio file.



Secondly go to the bottom of the screen where you can select the audio file that has to be played when the caller is waiting in the queue and when the caller is on hold.

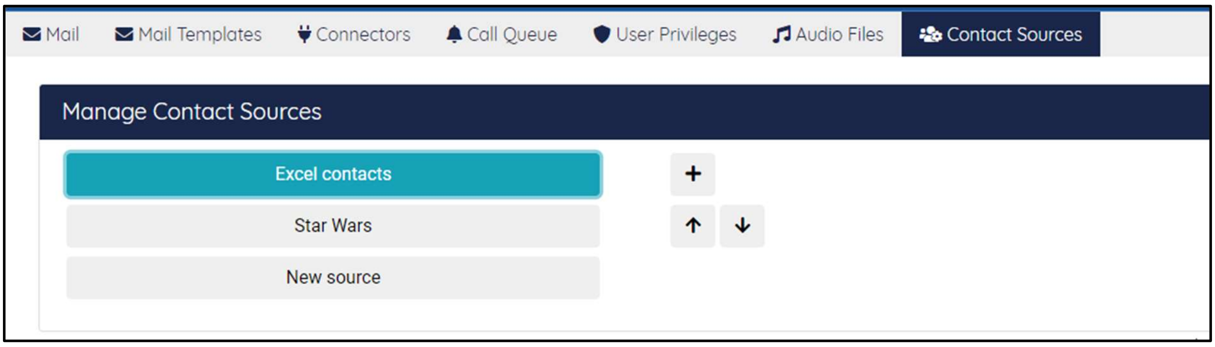
The displayed audio files are the ones that were uploaded in the 'Audio Files' tab.

Additionally, a default music on hold is provided which is played if no other audio was specified.



13.9 Contact sources

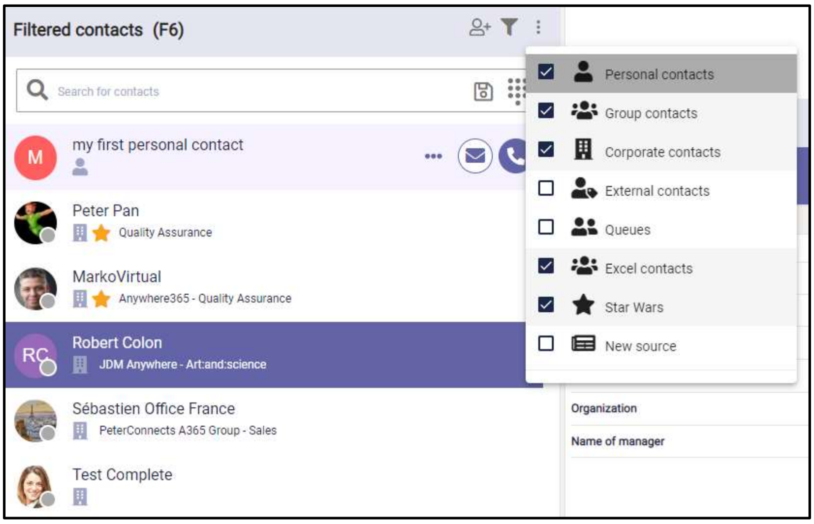
In the Admin Portal, under the tab ‘Contact Sources’ additional contact sources can be managed. Contacts from these sources will become part of the contact list (F6).



A new contact source can be added via a link to the source document, this can be Excel or CSV source documents.

Each contact source appears in the filter menu and can be toggled on/off just like other contact types.

After adding a contact source, an application refresh is necessary to make the contact source show up in the filter menu. The contact list (F6) will automatically be updated when the contacts in the source document are changed, however it might take some time for the new changes to end up there.



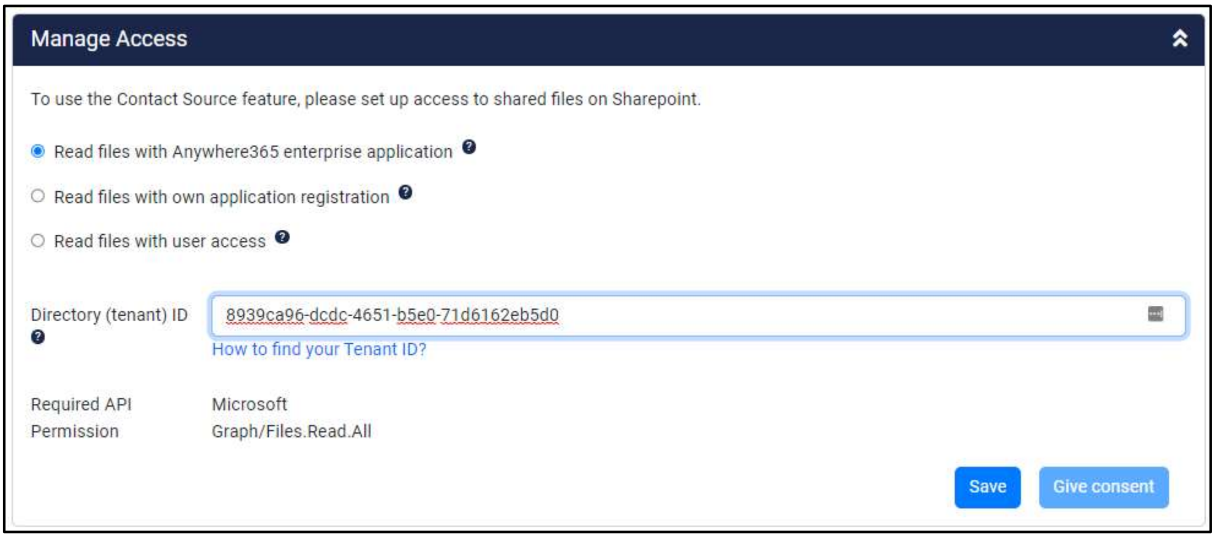
The order in which the contact sources are presented in the filter menu can be changed by clicking on an item in the list in the Admin Portal and using the arrow up and down buttons to the right to move it up or down the list, respectively.

13.9.1 Managing access

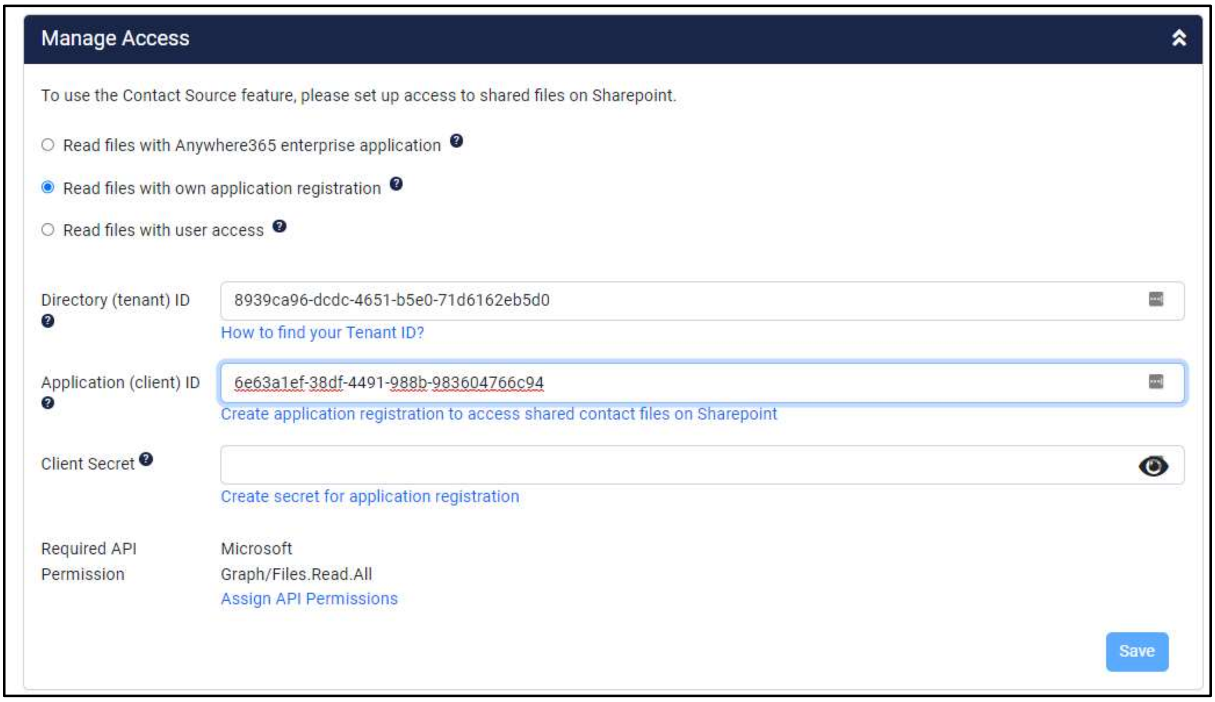
In order to work with contact sources, we need to set up a way for the attendant console to be able to read files from Sharepoint. At the top, there is a panel to manage access.

There are 3 possible ways to set up access:

1. Use the Anywhere365 enterprise application. For this, you only need to specify your own Azure tenant ID, save it and give consent. The Anywhere365 then has access to read the files your tenant's Sharepoint.



2. Create an application registration in your own tenant and configure the access to it here. You will need to set up the permissions yourself. The Client Secret is stored securely and after saving will not be shown in the admin portal. The links below each setting will help gather the required information and to set up the application in Azure.

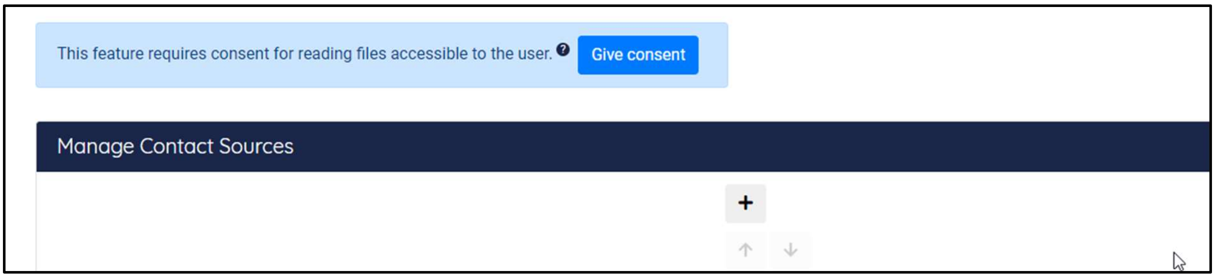


3. Use delegated access from your user. This option is only available if you are logged in with an Azure User in the Attendant Console. This also requires admin consent.
Since different users can be used to access the files, extra caution must be taken when setting up the access to the files in Sharepoint. If some users do not have access to the file, it might lead into issues when loading the contacts.

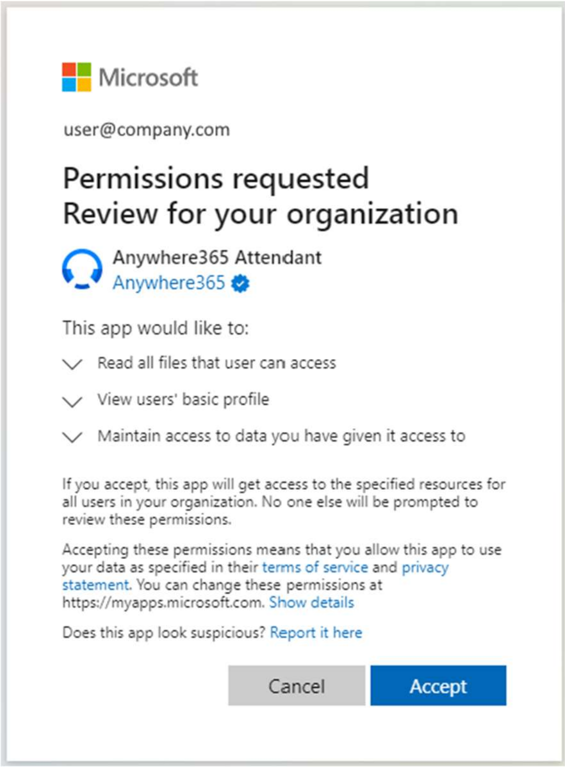
The Manage Access panel will be collapsed when there are contact sources configured, but the settings can always be revisited by clicking on the header.

13.9.1.1 Admin consent

As said before, the application requires admin consent for reading files users have access to. If this consent is not given, a message will pop up including a button to give consent. If no admin consent has been given, validating a contact source will result in a permission denied error.



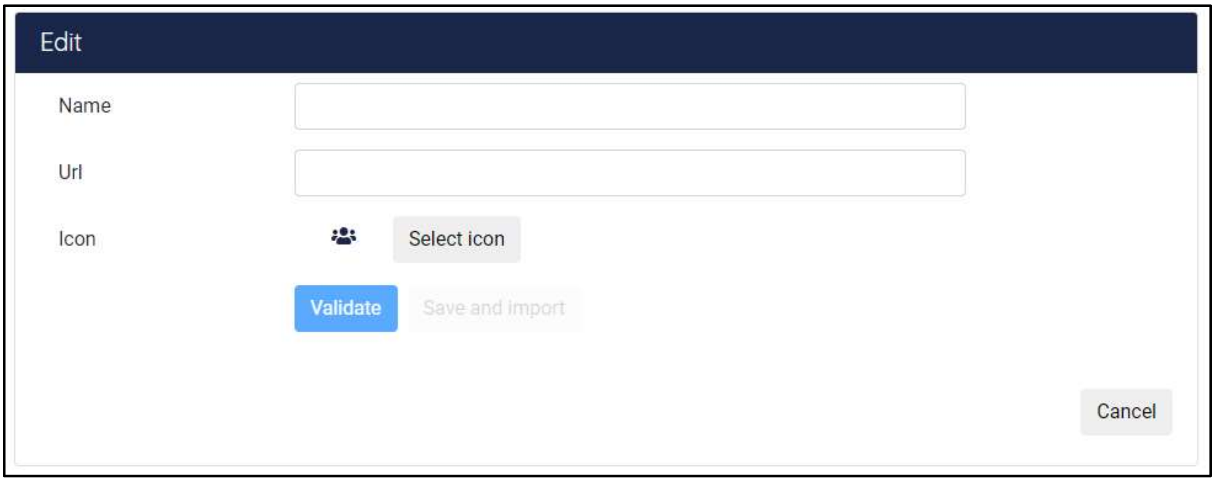
Clicking on the 'Give consent' button will redirect you to a Microsoft page where you can accept the permissions requested:



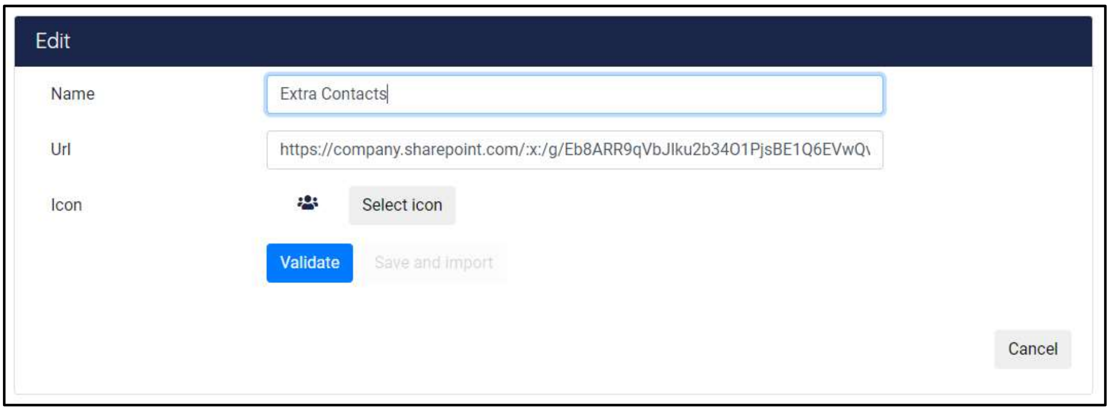
After giving consent, it might take a few minutes before it has been processed. Please refresh the page until the message disappears. Once the consent message is no longer presented, the contact sources are available to be configured.

13.9.2 Adding or changing a contact source

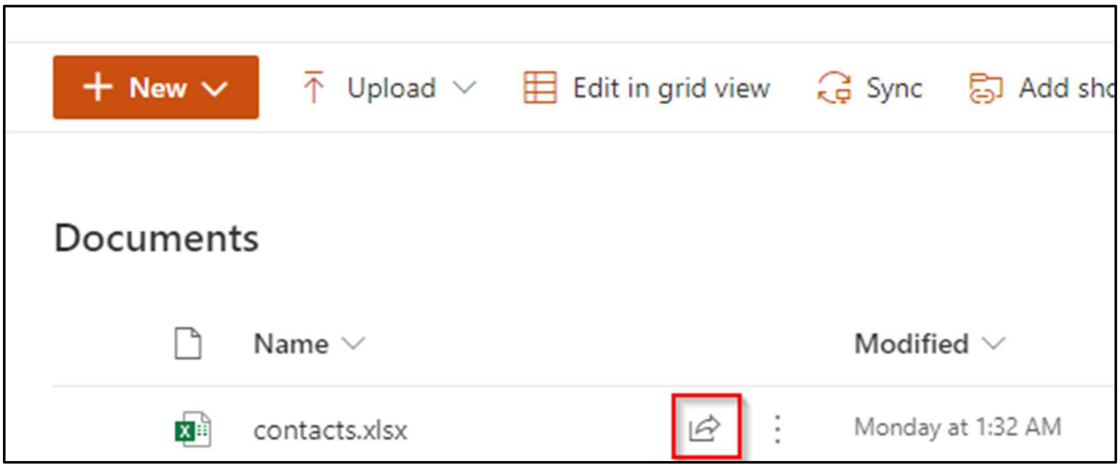
By clicking the plus icon + next to the list of current contact sources you can add a new contact source. After clicking the button, a new section opens below the list of contact sources. You can also select one of the contact sources in the list to edit.



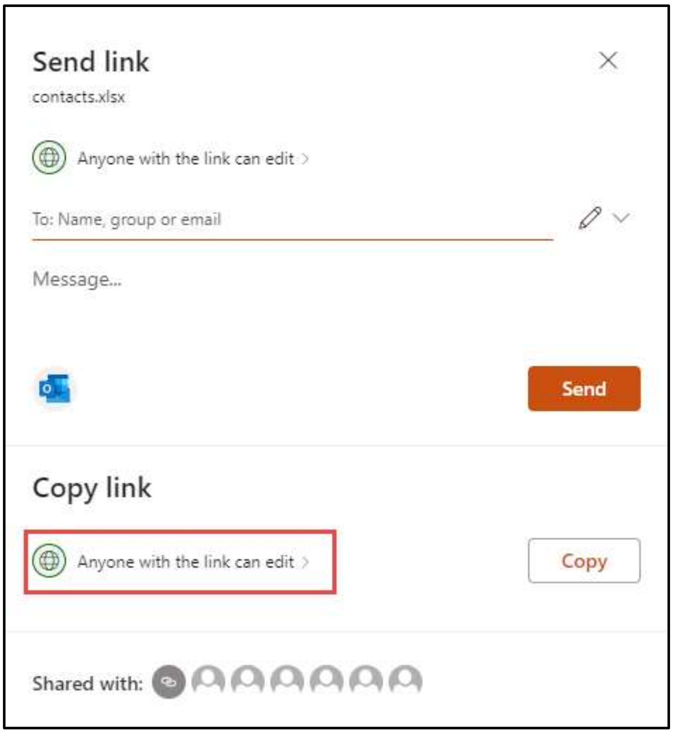
In the form you can give the source a name and icon which is displayed to the users in the contact list filter menu. You can also paste the URL of the file here.
Files can be either Excel files or Csv files stored on the organizations SharePoint or OneDrive.



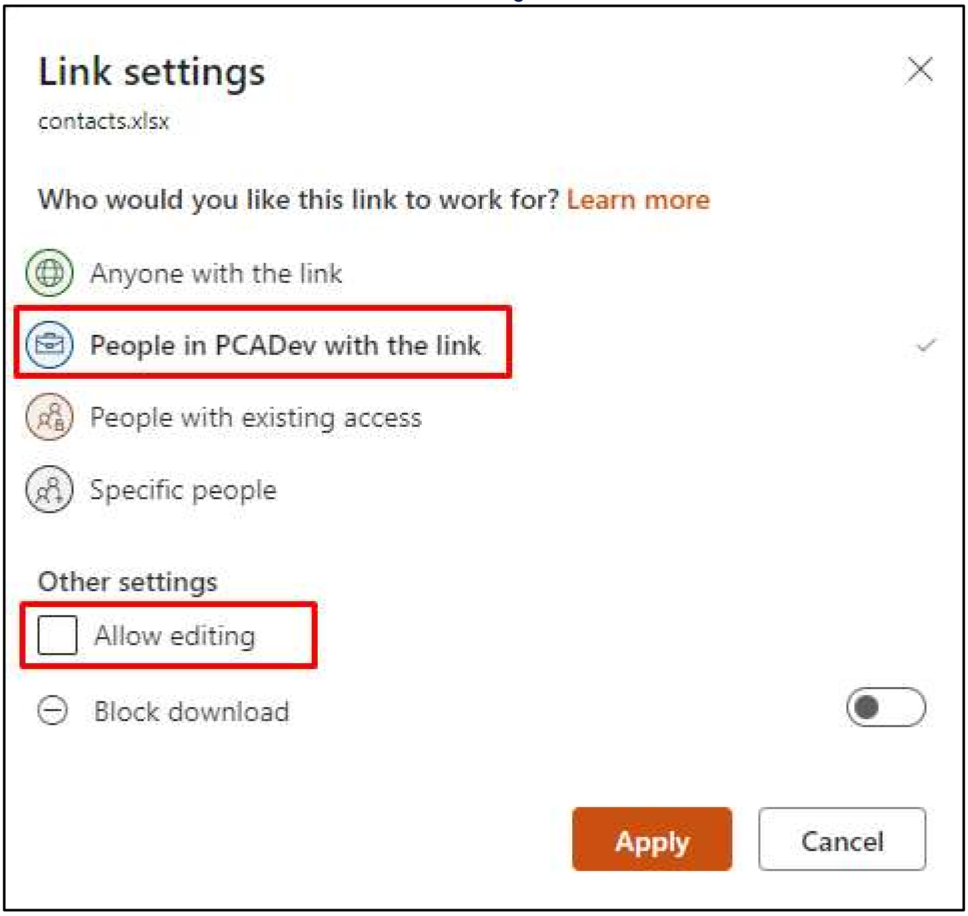
To create a URL which can be pasted in this form, go to your organization's SharePoint or OneDrive in your browser and locate the file. Then click on the Share Link button:



There you can copy the link and change access. By default, the Edit rights seem to be granted for everyone who has the link.
You have to change the settings by clicking on "Anyone with the link can edit".

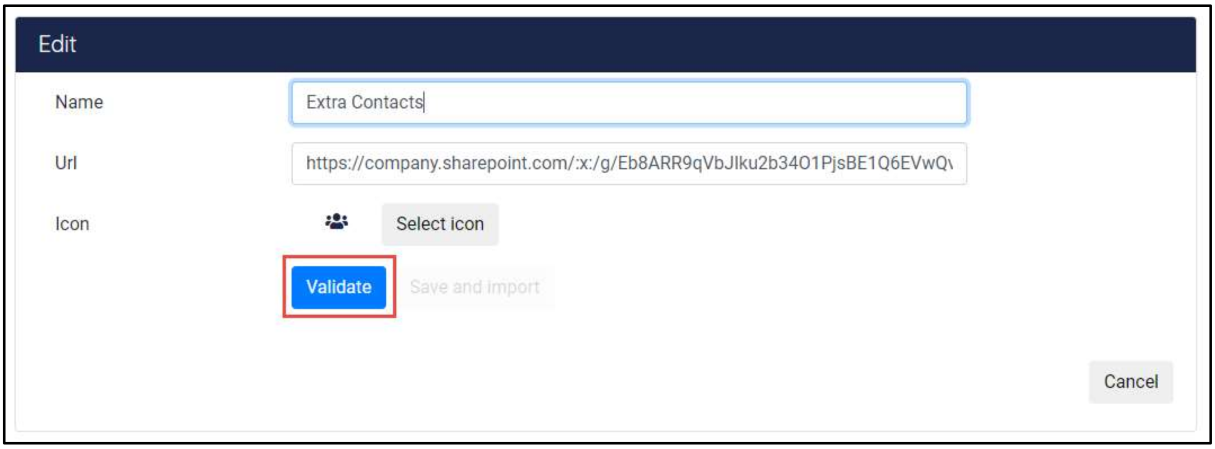


Only view access is required for the contact source functionality: uncheck the ‘Allow editing’ checkbox to make it read-only.
Additionally, make sure to make the link only works for people in the same organization. The option “Anyone with the link” is unsecure, while “People with existing access” or “Specific people” might not allow the system to read the contacts when the document has been changed.

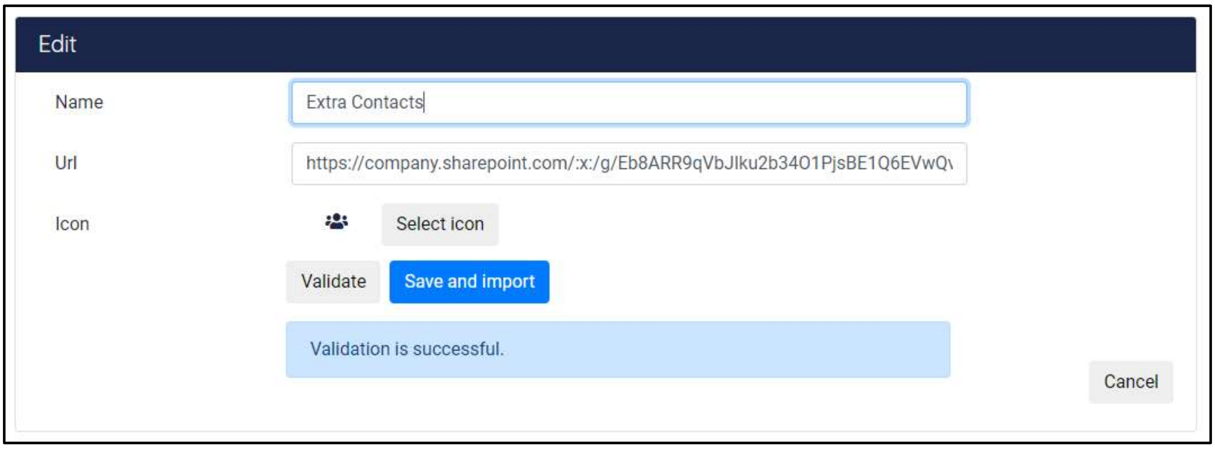


A pop up is presented with a 'Copy' button to copy the URL to the contact source to the clip board. Please verify that it indeed indicates that only people from your tenant with the link can view the document.

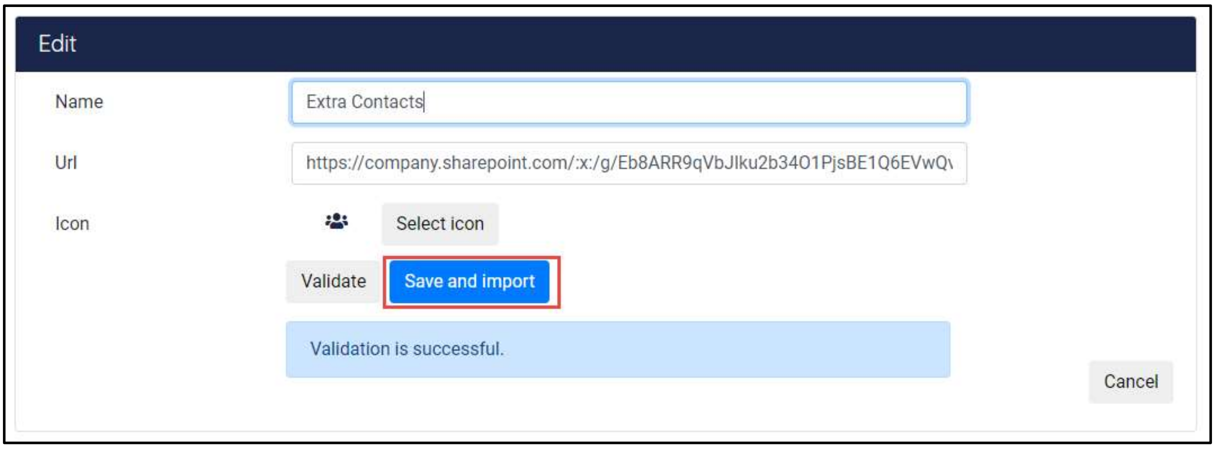
With the URL on your clipboard, please return to the admin portal. After filling in both the Name and the URL and optionally selecting a different icon, you have to validate the contact source by clicking the 'Validate' button.



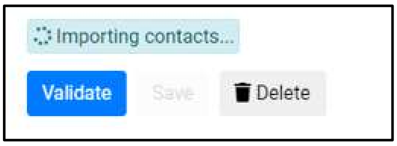
This will validate and test access to the contact source. After validation a message will appear to show the user whether the file is correct or not. In case the file is not valid a detailed message is shown, in case the file is valid it shows 'Validation is successful'.



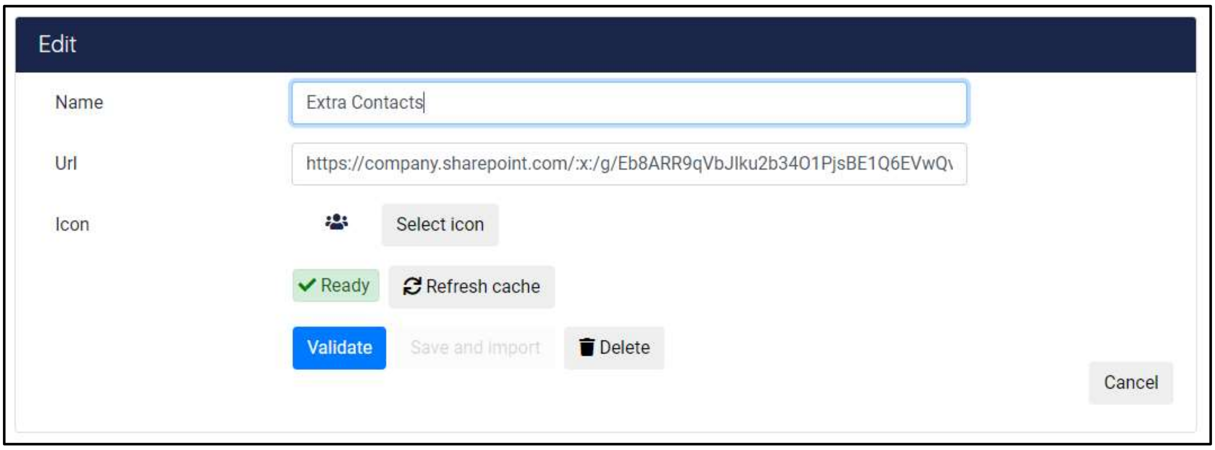
After a successful validation, the 'Save and import' button will be enabled. Click it to actually import and save the new contact source in the contact list (F6).



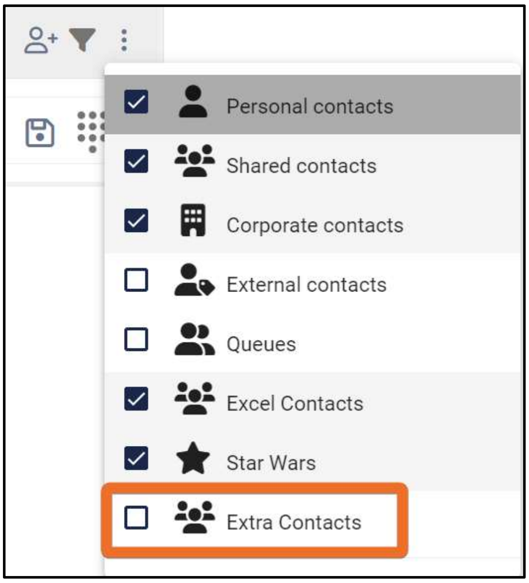
A progress message will appear showing the status of the import.



Once ready it shows a green ‘Ready’.



The contacts in the new contact source will only show up in contact list search results when all contacts have been imported and actually saved (available in the cache). After login the Attendant will see the new contact source in the contact list filter menu.

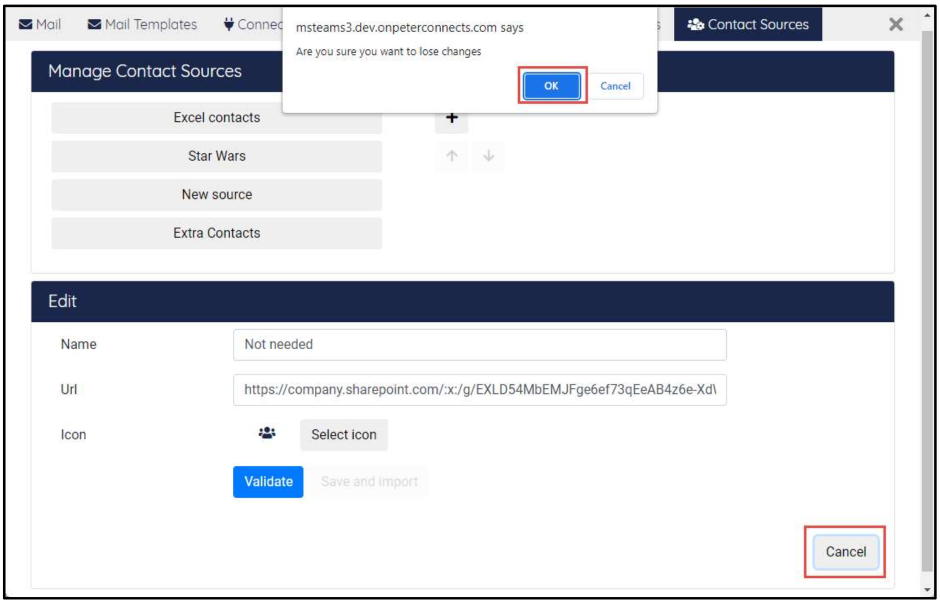


Changes to the underlying contact source files will automatically be picked up when a search is being performed and the file has been found to be modified. Important to know is: it might take some time before the changes are synchronized into the contact list, especially with large contact source files (it triggers a cache rebuild).

When the cache is ready, a 'Refresh cache' button appears. This button will force a complete refresh of the contacts in the source file.

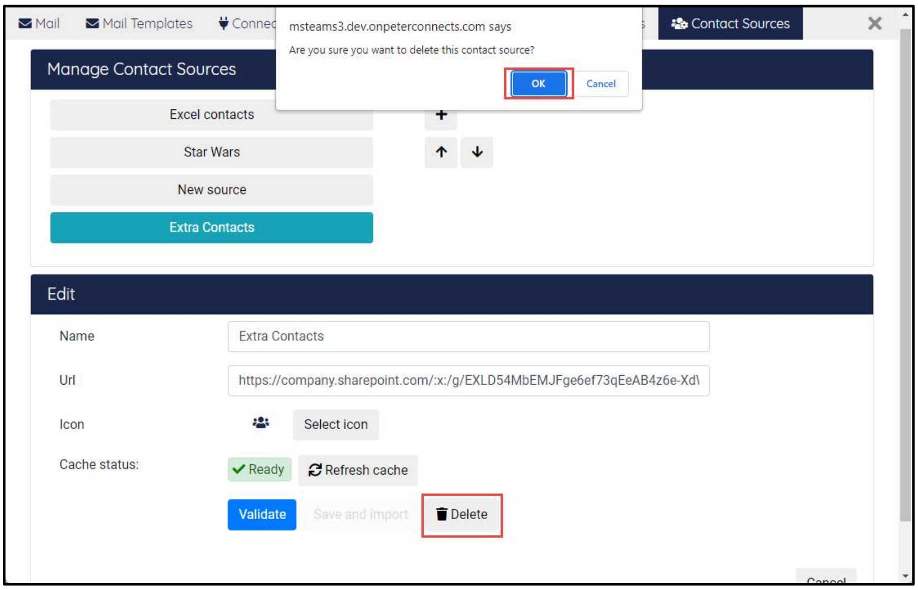
Note: after changing a document in Sharepoint or OneDrive, it may take a couple of minutes before the changes are picked up by the Admin Portal.

In case you do not want to create the contact source after all, you can click 'Cancel' and the bottom part is closed and nothing is saved.



13.9.3 Deleting a contact source

To delete a contact source, click on it in the list of contact sources. The form with the details will appear. Click the 'Delete' button confirm that you are sure you want to delete this contact source.



In the background, the contacts will be removed. The contact source will also disappear from the filter menu in the contact list (F6).

13.9.4 Supported file formats and columns

Currently the following files are supported: Excel files (.xlsx, .xls), comma or semicolon separated files (.csv) and tab separated files (.tsv).

For Excel files the first sheet must contain the data, all other sheets are ignored.

On the first row the column names are specified. Every column corresponds to a property of a contact. See below for a list of all properties supported. Required properties are the LastName and Id.

The next rows should contain the information of the contacts.

For template and example files, please see the following zip file:
https://delivery.anywhere365.io/deployment/Attendant-Attendant-Contact-Sources.zip

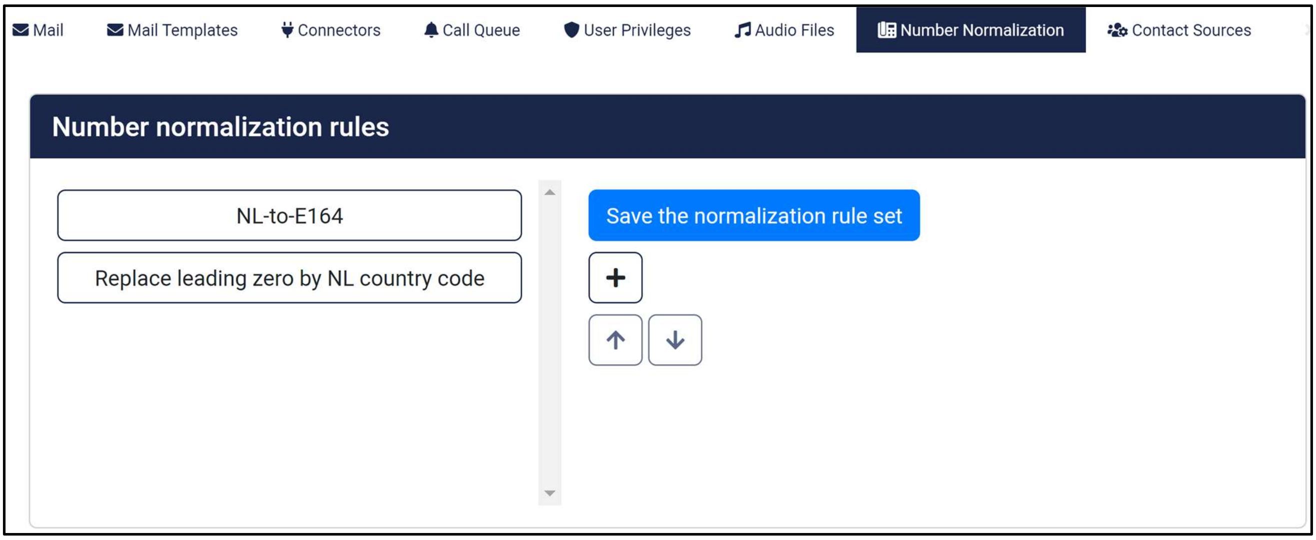
Below is a list of supported columns:

Column	Description
Id	(Required) A unique ID for this contact in this file.
FirstName	
MiddleName	
LastName	(Required)
CompleteName	
DisplayName	
Sexe	
Initials	
CompPrimaryPhone	Primary phone number
CompAltPhone	Alternative phone number
MobilePhone	
PrivatePhone	
Extension	

Pager	
Titles	
Function	
CompanyEmail	
PrivateEmail	
CompFax	
SipAddress	
BuildingAddress	
BuildingStreet	
BuildingHouseNumber	
BuildingPostalCode	
BuildingCity	
BuildingCountry	
BuildingState	
BuildingPoBox	
BuildingPoBoxZip	
BuildingPoBoxCity	
ManagerName	
Room	
Location	
Organization	
Department	
Building	
ExtraCol1	
ExtraCol2	
ExtraCol3	
ExtraCol4	
ExtraCol5	

13.10 Number normalization rules

In the Admin Portal, under the tab ‘Number Normalization’ rules can be configured that apply to all phone numbers in the Attendant while dialing out. This is necessary for example when local numbers need to be mapped to the E164 standard.

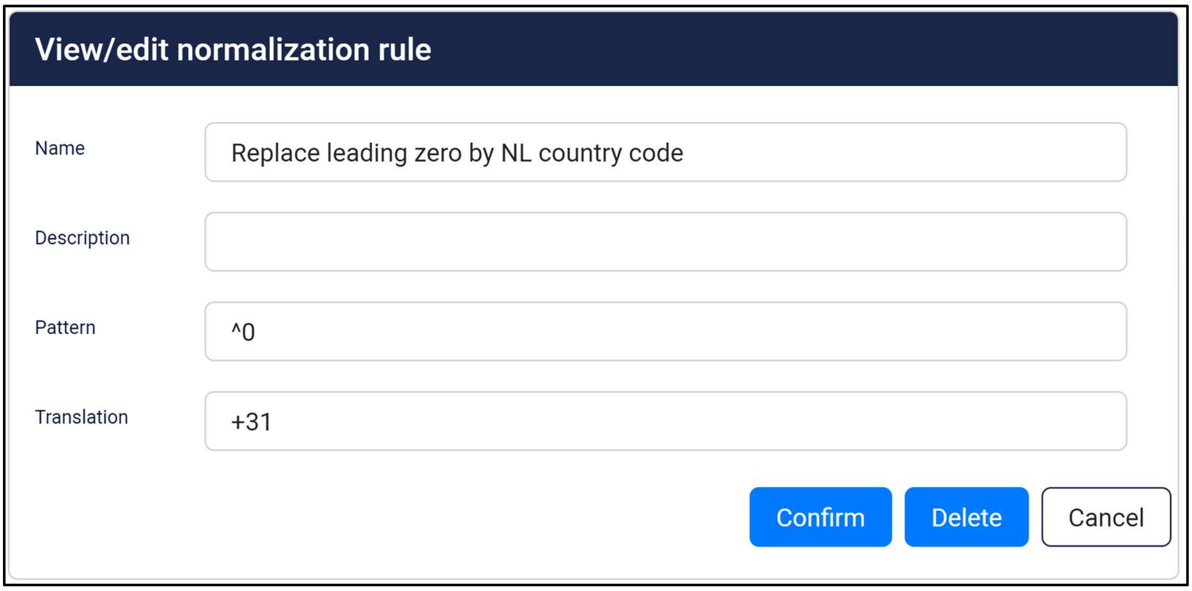


A list of number normalization rules is presented. You can change the order in which they appear by selecting one and clicking the arrow buttons on the right. The order is important, because it will try to match the patterns of the rules from top to bottom. Only the first matched rule will be applied. There is a separate button you need to press to save the complete rule set to the server. That way changes are not effective while you're still in the middle of configurating it all.

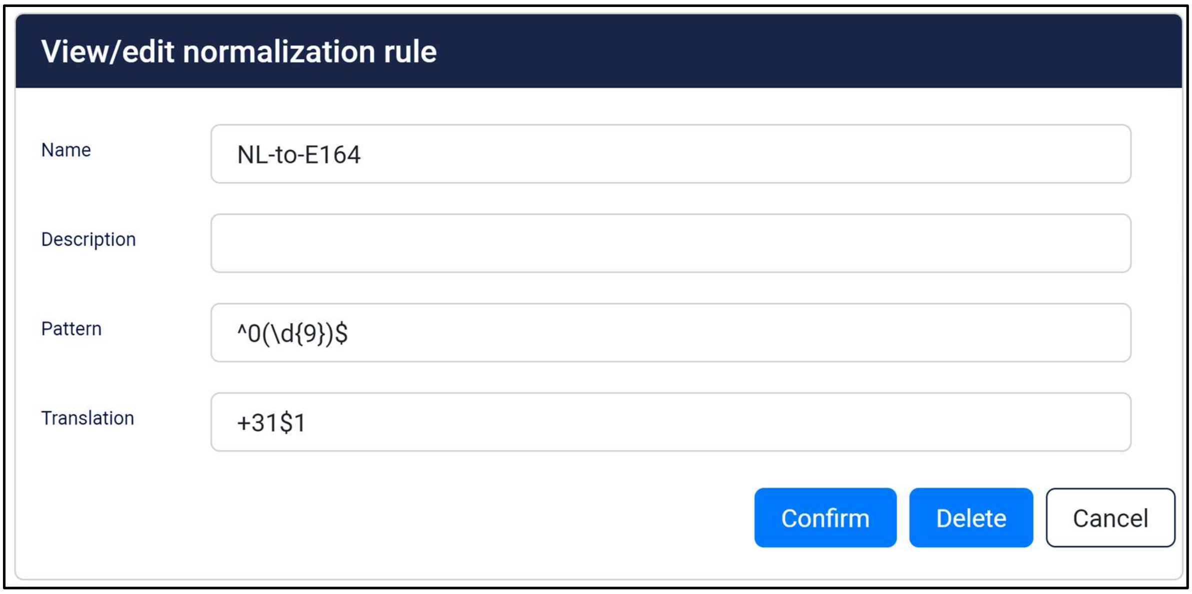
13.10.1 Adding/editing a rule

After clicking the 'Add' button  or selecting an existing entry, a new section opens below where you can enter a name, description, pattern and translation. The pattern field can take a regular expression and translation field takes the replace value. Some examples:

Replacing a leading zero by a different prefix:



Replacing the leading zero by a different prefix of a 10-digit phone number:



This will replace a matched phone number starting with 0 followed by 9 other digits, by +31 followed by the part of the matched phone number that was between brackets, so in this case those 9 digits. You can use the $1 (, $2 …) placeholder in the translation field to do this.

13.10.2 Testing the rule set

The test tab applies to the set of number normalization rules. Enter a phone number to be tested, and just like in the Attendant, it will be stripped from spaces, dashes and brackets first and then the configured normalization rules. The rule set can be tested before saving it to the server.

14 Change history

1.15	• Added paragraph 5.8.5 Copy contact information • Added something at the end of paragraph 8.1 Interface Preferences under subject ACS Integration • Added paragraph explaining the specifics of ACS, paragraph 8.4 ACS Integration • New paragraph 13.2.2 about setting the ACS connection string
1.14	• Added section §13.3.3 about call distribution settings per queue
1.13	• Update section §5.9 with option to add/edit/remove contacts in F6 • Added section about configuring Number Normalization rules
1.12	• Updated section 6.3 explaining consultative transfer to a queue is not possible. • Added section 8.3 for monitored and joined queue management. • Updated section 13.3.2 detailing the functionality description of overflow when no operator is logged in. • Updated section §13.9. Added information about setting up and managing access to external contact sources.
1.11	• Added info about required permissions for mail configuration via Office365 authentication §13.1
1.10	• Added additional dial buttons and transfer to voicemail to contact list actions in §5.6 • Updated section §13.8. Added security instructions, consent screenshot and link to contact source file templates and examples
1.9	• Added §5.11 describing the users Contact Source functionality • Updated sections §6.2, §6.2.3, §6.2.4, §6.3, §6.4 for the Hold/Resume functionality (including new screenshots) • Added section §6.2.6 about force hang up • Added §13.8 about managing Contact Sources • Updated §13.3 section added about Call Settings
1.8	• Updated §13.1 Mail configuration now has test email address field. • Updated image in chapter 9 • Updated section §8.1 with new screenshot and description of the Teams Desktop integrator • Added section §6.2.5 describing the rejoin functionality.
1.7	• Updated section §6.2, §6.3 and §6.4 with better images and textual improvement • Inserted section §5.10 describing the Group contacts • Removed section §13.1 for Calendar configuration • Added managing of Group contacts to section §13.1 • Removed section 13.2.1 as it is no longer relevant • Updated section §13.7 for call back mail template • Added section §13.8 for Music on Hold Configuration
1.6	• Added §13.7 in which maintaining the mail templates is described • Updated §5.10 in which the way the maintainable mail templates are being used is described • Updated §6.2.1 with a remark about hold/unhold functionality • Removed image for conference call in §6.2.3
1.5	• Inserted §13.6 describing the Admin Portal access • Updated §5.8.4 describing more options for Advanced search
1.4	• Inserted §8.2.1 describing the calling identity. Orignal §8.2.1 becamse §8.2.2 • Inserted §8.2.3 regarding calling timeout setting and changed picture in §8.2 • Added overflow configuration when no operator is logged in to §13.4
1.3	• Inserted §13.4 regarding overflow, §13.4 became §13.5
1.2	• Added §5.10.1 about opening the email form in a new window
1.1	• Reorganized § 5 about the contact list. Searching and filtering are now grouped under the same paragraph • Added § 5.8.3 about saving search queries • Added §5.8.4 about advanced search • Inserted §5.9 about managing personal contacts • Updated §5.11 about contact notes, to reflect the new way of deleting a contact note. • Temporarily removed § 6.4 about conference calling • Added § 6.5 about calling and transferring to other contact numbers

	• Updated and added text and a new image in § 12.2, you can configure bcc e-mail addresses
1.0	• Initial version
	•

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