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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 Login

When you use the browser to navigate to the receptionist (the URL will be provided by your system administrator), you will be redirected to a login page. Here you can login 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, login might be automatic, and you might be forwarded to the Attendant immediately.
4 The Attendant main screen

Once logged 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 the panels to any size you like 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 PeterConnects 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-mot 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:
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.
- **Companywide contact.** This contact is available for all users in the company.
- **External contact.**

5.5 Presence

When the application is configured to show presence states of the contacts in your contact list, then the contact list might look like this:
Depending on the type of telephony system that your company uses, the presence state may look a bit different. 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 will show the presence state in words. 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).**

- **Add or edit the note for the selected contact**
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 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 favorite mode, you can sort your favorites by dragging the favorite contacts 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:

You can click on the 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 search results in the contact list are now sorted by relevance. Note that when the result limit is reached, not all matching contacts are displayed. In this case, a search term should be entered or the existing search term should be refined 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. This dial pad can be switched on or off via clicking on the dial pad icon.

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 when you select ‘Personal contacts’, the contact list will be filtered right away by showing only your personal contacts:

When activating one of the filter options, the filter is automatically switched on, and it will remain active until you turn it off by clicking on the ‘Filter contacts’ button again.
When you turn on the filter again by clicking on the ‘Filter contacts’ button, the last used filter options will be applied again to your contact list.

When the ‘Filter Contacts’ icon is like this: 🔴, the filter is active.

When the ‘Filter Contacts’ icon is like this: 🔵, the filter is not active.

Your filter settings will be remembered between your 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

<table>
<thead>
<tr>
<th>Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;no key&gt;</td>
<td>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.</td>
</tr>
<tr>
<td>Source</td>
<td>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</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Contact details field name</th>
<th>Example</th>
<th>Azure AD field name</th>
</tr>
</thead>
<tbody>
<tr>
<td>First name</td>
<td>FirstName:dav</td>
<td>First name</td>
</tr>
<tr>
<td>Last name</td>
<td>LastName:dav</td>
<td>Last name</td>
</tr>
<tr>
<td>Email</td>
<td>Email:<a href="mailto:dav@dav.com">dav@dav.com</a></td>
<td>Email</td>
</tr>
<tr>
<td>Primary number</td>
<td>Phone:123</td>
<td>Office phone</td>
</tr>
<tr>
<td>Mobile number</td>
<td>MobilePhone:123</td>
<td>Mobile phone</td>
</tr>
<tr>
<td>Function</td>
<td>Function:dev</td>
<td>Job title</td>
</tr>
<tr>
<td>Department</td>
<td>Department:sales</td>
<td>Department</td>
</tr>
<tr>
<td>Organization</td>
<td>Organization:dev</td>
<td>Company name</td>
</tr>
<tr>
<td>Building</td>
<td>Building:dav</td>
<td>Office</td>
</tr>
<tr>
<td>Street of building</td>
<td>BuildingStreet:dav</td>
<td>Street address</td>
</tr>
<tr>
<td>Postal code of building</td>
<td>BuildingPostalCode:123</td>
<td>ZIP or postal code</td>
</tr>
<tr>
<td>City of building</td>
<td>BuildingCity:dav</td>
<td>City</td>
</tr>
<tr>
<td>Country</td>
<td>BuildingCountry:dav</td>
<td>Country or region</td>
</tr>
<tr>
<td>State or province</td>
<td>BuildingState:dav</td>
<td>State or province</td>
</tr>
<tr>
<td>Name of manager</td>
<td>Manager:dav</td>
<td>Manager</td>
</tr>
</tbody>
</table>
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

### 5.9 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 personal 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.

3. Then the personal 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:
The personal 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.

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 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.
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.
5.10.1 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:

![Mail form with pop out button](image)

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:

![Mail sent successfully message](image)

5.11 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.

![Contact details with note button](image)

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

![Contacts list with note button highlighted](image)

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'.

Tim does not work on fridays.
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:

![Connecting to the server](image)

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.

![Retry button](image)

6.2 Call states, destination and call actions
In the screen below, there are three calls:

- A call on hold with Melissa van Dijk
- An active call (Stephen Postma)
- An incoming call (Johan ’t Hart)
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.

- ![Active call icon](image) This is the active (connected) call
- ![Hold icon](image) This call is on hold
- ![Pre-alert announcement icon](image) The caller is hearing a pre-alert announcement

Remark: "Hold/UnHold" is not yet directly available within the Attendant console, but can be established with the usage of the Teams Desktop application.

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

- ![Destination icon](image) This is the destination of the call
- ![Fallback from icon](image) This shows from which destination the call falls back into Conversations
- ![Forward (always) from icon](image) 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:
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.

6.3 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:

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

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. When dragging, you will see dotted lines where you can drop the call.

6.4 Working with queue calls
When you have queue(s) assigned to you, the display of the calls will be different. Queue functionality is only available in the Premium edition.
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

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:
Now you have to answer the call again in your Teams client. After this, you will be connected to the call, and the call will be shown as follows:

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.

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:

![Contact User Pop-Up](image)

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 an other 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:

![Available]

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:

![Do not disturb]

**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:

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

- \( \text{📞} \) = Conversation area (F2)
- \( \text{📞} \) = Conversation detail area (F3)
- \( \text{📞} \) = Contact list (F6)
- \( \text{📞} \) = 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:

Language
You can set the display language to English, Dutch, French or German.

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.

<table>
<thead>
<tr>
<th>Calling Identity</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Caller ID for outbound calls</td>
<td>Receptionist Anywhere365 [Production] (+31107... )</td>
</tr>
</tbody>
</table>

### 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'.

<table>
<thead>
<tr>
<th>Audio Alerting</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>My Calls</td>
<td>&lt;None&gt;</td>
</tr>
<tr>
<td>Monitored queues</td>
<td>&lt;None&gt;</td>
</tr>
<tr>
<td>Suppress alerts when in a call</td>
<td>☑</td>
</tr>
</tbody>
</table>

Calling Timeout

| On hold timeout (s) | 60 |
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.

- On hold timeout (s): 60
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:
## Shortcuts

### Global shortcuts

<table>
<thead>
<tr>
<th>Key</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>F2</td>
<td>Activate conversations panel</td>
</tr>
<tr>
<td>F3</td>
<td>Activate conversation details panel</td>
</tr>
<tr>
<td>F6</td>
<td>Activate contacts panel</td>
</tr>
<tr>
<td>F7</td>
<td>Activate contact details panel</td>
</tr>
<tr>
<td>F9</td>
<td>Activate Homepage panel</td>
</tr>
<tr>
<td>F4</td>
<td>Put current conversation on hold</td>
</tr>
<tr>
<td>Alt + P</td>
<td>Add personal contact</td>
</tr>
<tr>
<td>Alt + R</td>
<td>Show most recently used</td>
</tr>
<tr>
<td>Alt + V</td>
<td>Show favorites</td>
</tr>
<tr>
<td>Alt + L</td>
<td>Turn filter on or off</td>
</tr>
</tbody>
</table>

### Shortcuts for conversations panel (F2)

<table>
<thead>
<tr>
<th>Key</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>→</td>
<td>Show conversation details in F3 / Show queue calls</td>
</tr>
<tr>
<td>←</td>
<td>Hide queue calls</td>
</tr>
<tr>
<td>↑</td>
<td>Select previous conversation</td>
</tr>
<tr>
<td>↓</td>
<td>Select next conversation</td>
</tr>
<tr>
<td>Enter</td>
<td>Pickup conversation / Retrieve call from hold</td>
</tr>
<tr>
<td>Ctrl + Enter</td>
<td>Transfer</td>
</tr>
<tr>
<td>Delete</td>
<td>Hang up</td>
</tr>
</tbody>
</table>

### Shortcuts for conversation details panel (F3)

<table>
<thead>
<tr>
<th>Key</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter</td>
<td>Pickup conversation / Retrieve call from hold</td>
</tr>
<tr>
<td>Delete</td>
<td>Hang up</td>
</tr>
</tbody>
</table>

### Shortcuts for contacts panel (F6)

<table>
<thead>
<tr>
<th>Key</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ctrl + →</td>
<td>Show contact details in F7</td>
</tr>
<tr>
<td>→</td>
<td>Show contact details in F7 (with one column in F6)</td>
</tr>
<tr>
<td>←</td>
<td>Move to the right in the contact list (with multiple columns in F6)</td>
</tr>
<tr>
<td>↑</td>
<td>Move to the left in the contact list</td>
</tr>
<tr>
<td>↓</td>
<td>Move up in the contact list</td>
</tr>
<tr>
<td>Enter</td>
<td>Move down in the contact list</td>
</tr>
<tr>
<td>Escape</td>
<td>Dial or pickup</td>
</tr>
<tr>
<td>Ctrl + Enter</td>
<td>Cancel search</td>
</tr>
<tr>
<td>Ctrl + E</td>
<td>Blind transfer</td>
</tr>
<tr>
<td>Ctrl + E</td>
<td>Send mail to selected contact</td>
</tr>
</tbody>
</table>

### Shortcuts for contact details panel (F7)

<table>
<thead>
<tr>
<th>Key</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter</td>
<td>Dial or pickup</td>
</tr>
<tr>
<td>Ctrl + E</td>
<td>Send mail to selected contact</td>
</tr>
</tbody>
</table>
10 Widgets

The detail areas of the Attendant (and the homepage as well) contain 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:

![Maximize button example](image1)

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

![Minimize button example](image2)

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
fa = French,
nl = Dutch,
de = German

[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.

<table>
<thead>
<tr>
<th>Days shown in the week view</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Sunday</td>
</tr>
<tr>
<td>☑ Monday</td>
</tr>
<tr>
<td>☑ Tuesday</td>
</tr>
<tr>
<td>☑ Wednesday</td>
</tr>
<tr>
<td>☑ Thursday</td>
</tr>
<tr>
<td>☑ Friday</td>
</tr>
<tr>
<td>☐ Saturday</td>
</tr>
</tbody>
</table>

10.4.2 Contact information widget
This widget shows the basic contact information for the selected contact. Note that for contacts from the Broadworks Attendant, "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 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.

10.4.6 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.
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


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 Calendar

The Attendant contains a calendar widget, that displays the calendar of the selected contact. This widget needs some central configuration before it can fetch the data of the calendar. That configuration is done in the Admin portal on the Calendar page.

The screen shows a selection of which kind of calendar connector you want to use. ‘None’ is selected by default. The other options are ‘Microsoft Office 365’ and ‘Google Suite’. These are described in the next paragraphs.

13.1.1 Microsoft Office 365

There are two options to configure calendar access. One option is to use the user context, so the calendars are accessed on behalf of the logged in user. The other option is to access the calendars as an application.
13.1.1.1 User context

When choosing this option, the context of the user will be used to request calendar. Only calendars and appointments the signed in user has access to will be shown. The experience will be the same as in outlook.

13.1.1.2 Application context

In this screen you can setup a connector for Microsoft Office 365. To be able to read the calendars of your users, there needs to be an Application Registration in your Azure Tenant. After creating this App, you can fill in the Tenant Id, Client Id and Client Secret. The field Required API Permission shows the permission you should assign to this app.
Be sure to assign application permissions (and not delegated permissions).

For more information about these fields, you can click on the blue links below the fields. They will open a website in a new tab, containing information on how to configure those fields. These pages are publicly available websites that are not owned by the maker or the supplier of the Attendant. Therefore, we cannot guarantee that these links will always be available.

When you have entered all data, you can click on the button “Test” to check if the settings you entered are correct to setup a connection to tenant. Then you can press the button “Save” to store those settings.
13.1.2 Google Suite

In this screen you can setup a connector for Google Suite.

First you have to generate the Service Account ID by a click on the "Generate ID" button. This generates your unique "Service Account ID", which you have to enter in your Google Suite.

The field "Api scope" has already been filled in for you. This is always the same.

The field "Google suite" contains a link that will open a webpage that contains information about connecting to the Google Suite from other applications. It will be opened in a new tab.

In order to test the configuration, you have to fill in a "Test username", which has to be a valid email address from your Google Suite. When you click on the button "Test", the configuration is tested. Then you can press the button "Save" to store those settings.

**Note:** If you configured the Google Calendar settings in the Admin portal, but the user still does not see the calendar events in the calendar widget, please check if the user has a valid email address that has enough rights to read the calendar of the selected contact.

13.2 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.

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.
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.
- **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.

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.

### 13.3 Connectors

#### 13.3.1 PeterConnects Teams Bot

On tab page ‘Connectors’ you can configure connections to other systems and applications. One of those applications is the PeterConnects Teams Bot. With this form, the administrator of an Azure tenant can give Administrator Consent for connecting to the PeterConnects Teams Bot.

Note that you have to be signed into the Admin Portal with the correct Azure Id in order to give consent.
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.
13.4 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
- 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.

13.4.1 Configure an action when no operators are logged in

Select an action (default is ‘no action’):

- Disconnect
- Redirect this call to…
13.4.2 Configure an action when the maximum number of calls has been reached
Select an action (default is 'no action'):

- Disconnect
- Redirect this call to...

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

13.4.3 Configure an action when call times out
Select an action (default is 'no action'):

- Disconnect
- Redirect this call to...

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.

13.5 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

13.6 User privileges for admin portal access
On tab page 'User Privileges' you can configure the which users can have access to the Admin Portal.

With the '(Default for new users)', it is possible set the default for new users. When the 'Enable Admin Portal access' is checked, all new users get Admin Portal access, when unchecked, new users do not get Admin Portal access.
When searching for a specific user, the setting for this user can be set to enable or disable Admin Portal access.
Remark: A user cannot remove the Admin Portal access for his/her own account. This is shown with a message.

13.7 Maintain callback mail template

On tab page 'Mail Template' you can configure mail templates used for callback. 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.
13.8 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 should select a mail template when sending a callback reminder mail.

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

By selecting a mail template, the content of the mail template are shown in the bottom half of the screen. The user can change the content and then press save. Or the user can click the delete button to delete a mail template that is obsolete.

By clicking on the + button in the upper half of the screen it is possible to create a new mail template.
## 14 Change history

<table>
<thead>
<tr>
<th>Version</th>
<th>Changes</th>
</tr>
</thead>
</table>
| 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. Original §8.2.1 became §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 |