RECEPTIONIST / ATTENDANT CONSOLE FOR MICROSOFT TEAMS

User Guide

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What is Receptionist Console?

Receptionist Console is a simple browser-based application, which integrates with Microsoft Teams (MS Teams) allowing users to make, receive and transfer calls. It sits outside of the Microsoft Teams interface, whilst utilizing MS Teams permissions and contact numbers. The console gives Receptionists, Operators and Receptionists the ability to manage multiple incoming calls with ease.

Receptionist Console is an add on product that is being sold internationally to customers who purchased Operator Connect.

How do you Login?

To access your Receptionist Console, visit: **https://www.fusionconnect.com/support/ms-teams-support**, …click **"Download the Attendant Desktop App"** (see the below screen capture)…

***Follow the prompts to download your Console. Once downloaded, your Console will appear. Click on **"SIGN IN"** and then enter your Microsoft Teams credentials – *your email address and password*. ***

After logging in, initially users will be met with a blank screen / Layout.

Customizing the Layout

The layout of the screen can be adjusted by visiting the **More** icon **(…)** and selecting **Settings**.


Select **Layout** from the menu to customize the layout using the menu on the right. With the standard 3 column, 4 panel configuration, calls will come in on the left-hand column (1.1). When searching for contacts using the search field, contacts will appear in the middle column (2.1).
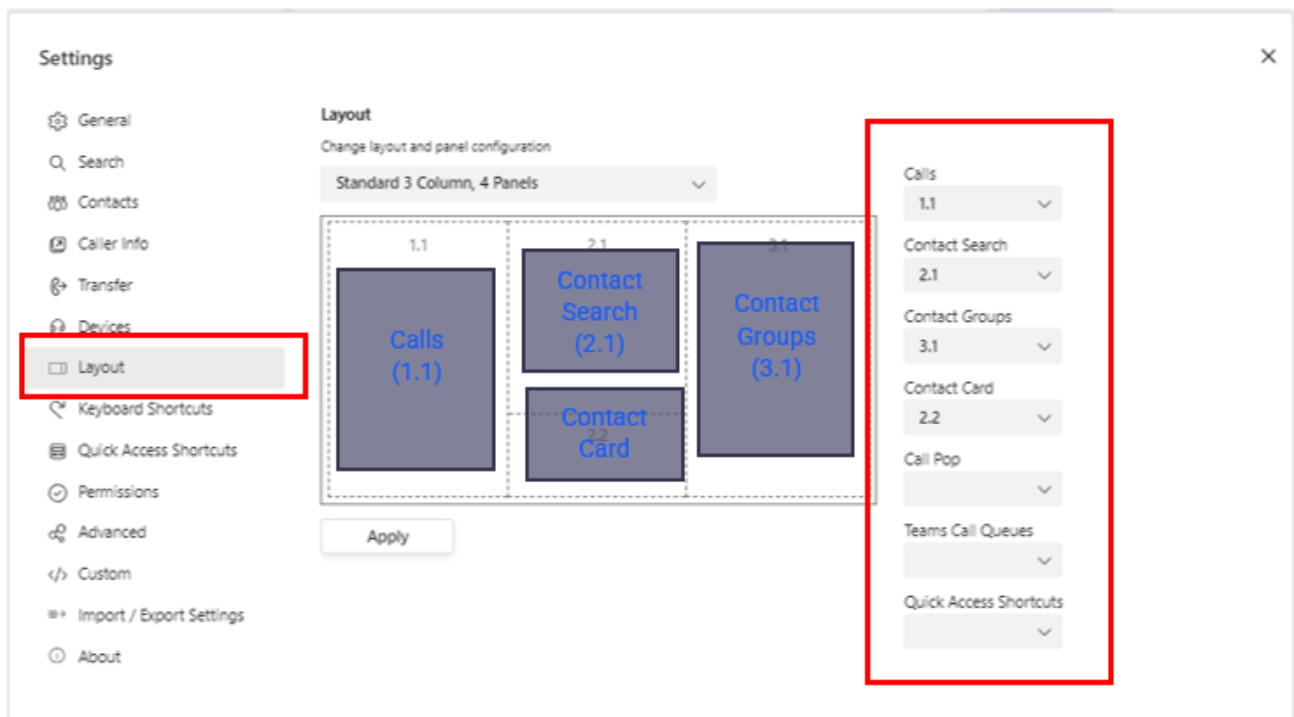
After selecting a contact, their Contact Card will appear at the bottom of the middle column (2.2). And finally, the selected contact groups will appear in the right-hand column (3.1).

Viewing a Contact

Let's take a look at what viewing <u>a</u> contact looks like. When typing in a name to the **Search** field, all contacts that match the typed phrase will appear below.
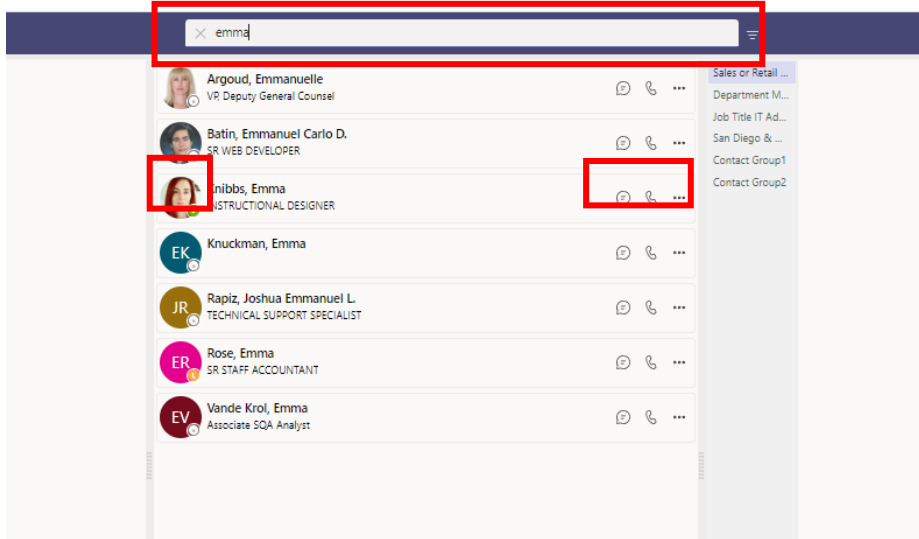
The contact's presence is indicated next to their profile picture. You can click on the shortcut icons for each contact to immediately chat or call.

To select and view further details, click on the relevant **Contact** and the panel below will populate with further information… their "Contact Card":
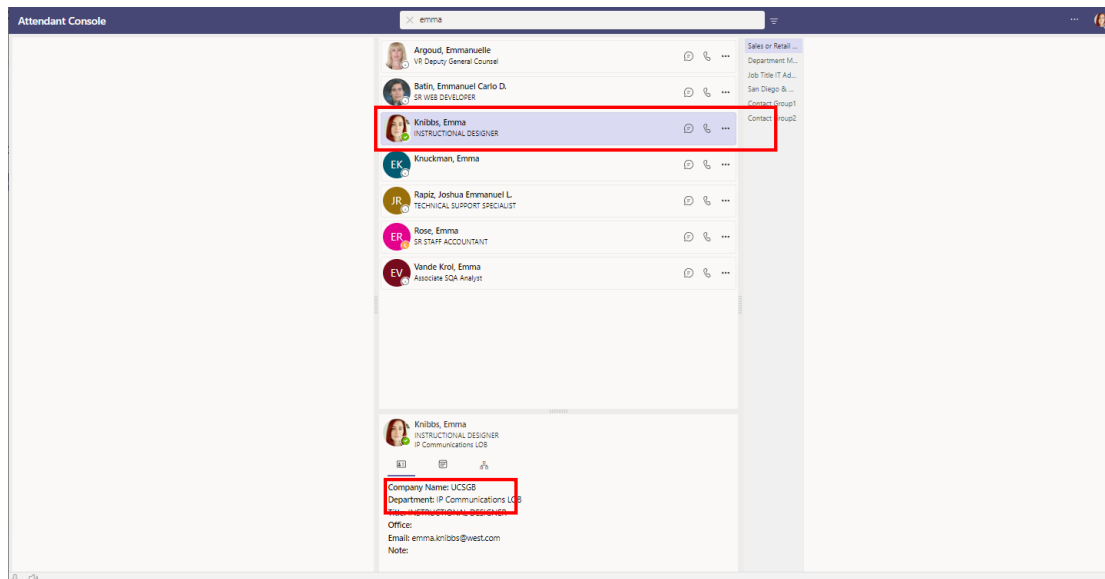

Click on their Card to see their contact details, any upcoming meetings they have (dependent on the user's privileges) and their organization chart.

Managing Calls

When calls come in, the caller will appear in the column on the left-hand side of the console. You can simply click the purple phone icon to answer the call.
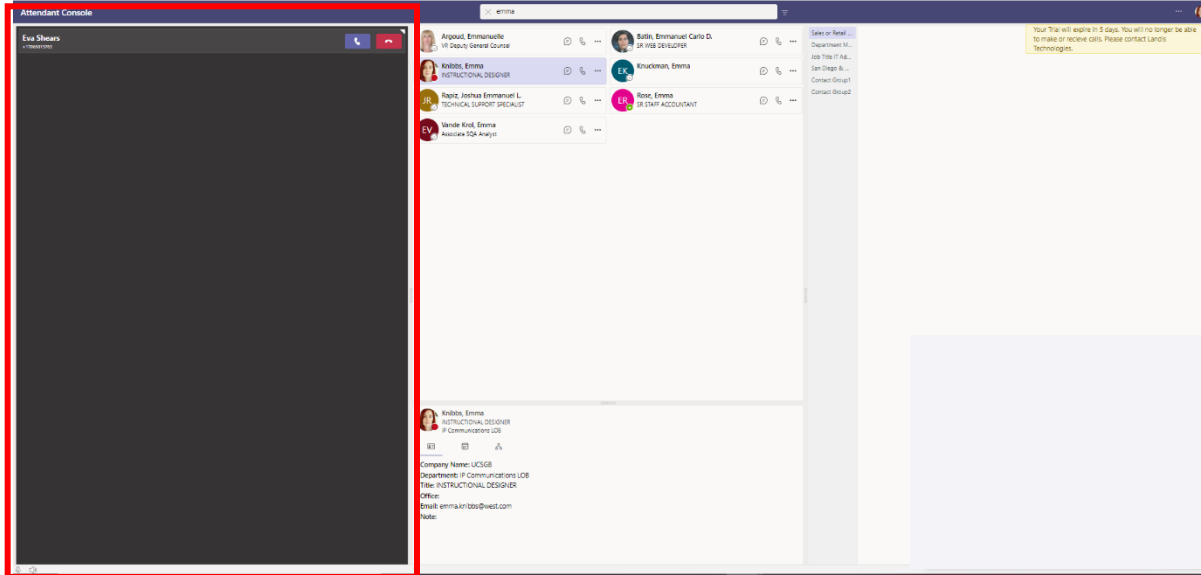
Once the call is answered, various call options become available:
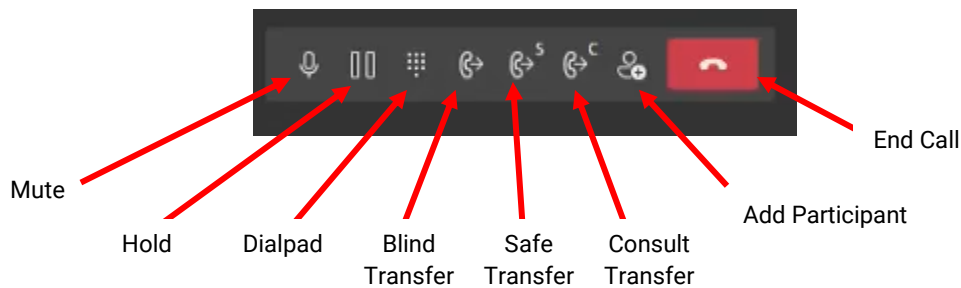
- **Mute** mutes your voice and background from being heard
- **Hold** places the caller on Hold and removes the caller from Hold
- **Dialpad** opens the Dialpad
- **Blind Transfer** allows the user to forward calls directly to another person *(a one click Transfer)*
- **Safe Transfer** sends the call to another person. If they do not pick up, the call comes back to you
- **Consult Transfer** allows the user to call the transferring person first before transferring the caller to them to see if the transfer person is available before transferring the caller to them introduce the caller before disconnecting *(also known as a warm transfer)*
- **Add participant** allows users to add another person to the call
- **End Call** terminates your call

To transfer a call that has come into the console, click the appropriate transfer button (Blind, Safe, or Consult), search for the **Contact** you want to transfer to, and once you are ready, select the phone icon for the **Contact**.

Contact Groups

Click on the **Contact Group** to see a list of contacts in the group.
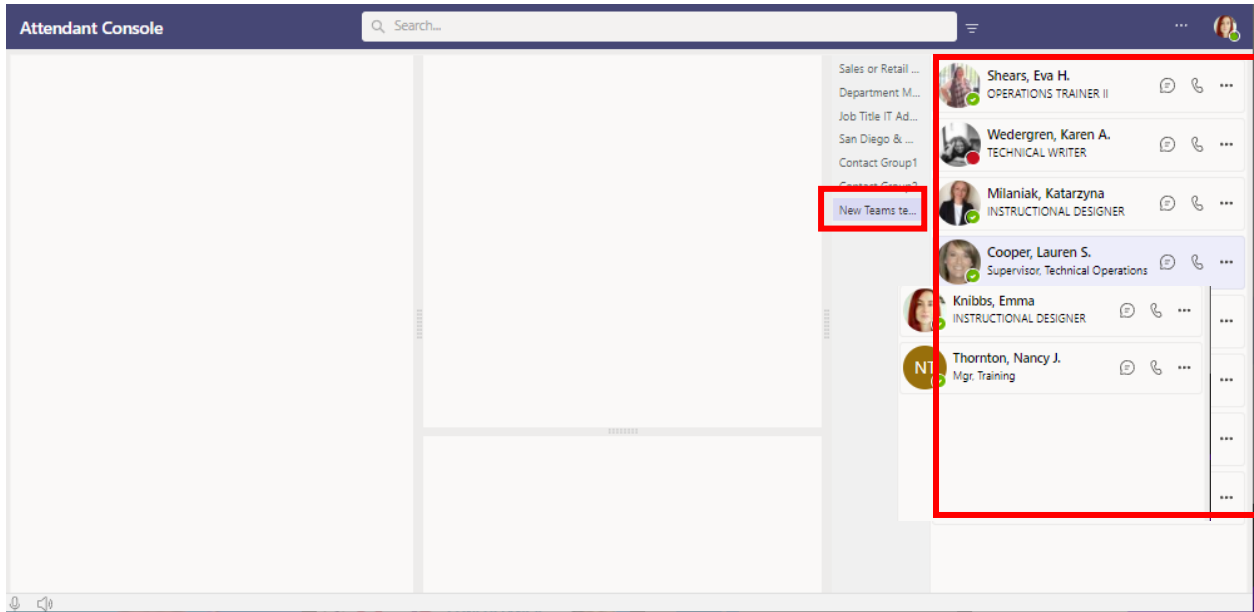
Creating New Groups

Contact groups are simply a list of contacts, either grouped by team, or a group of manually selected contacts. New contact groups can be created by going to **Settings**, then **Contacts**. Then selecting **New Contact Groups**. A group can be set up one of two ways, by using an existing MS Teams group, or manually creating a group and selecting users. You might want to manually create a group for frequently called contacts.
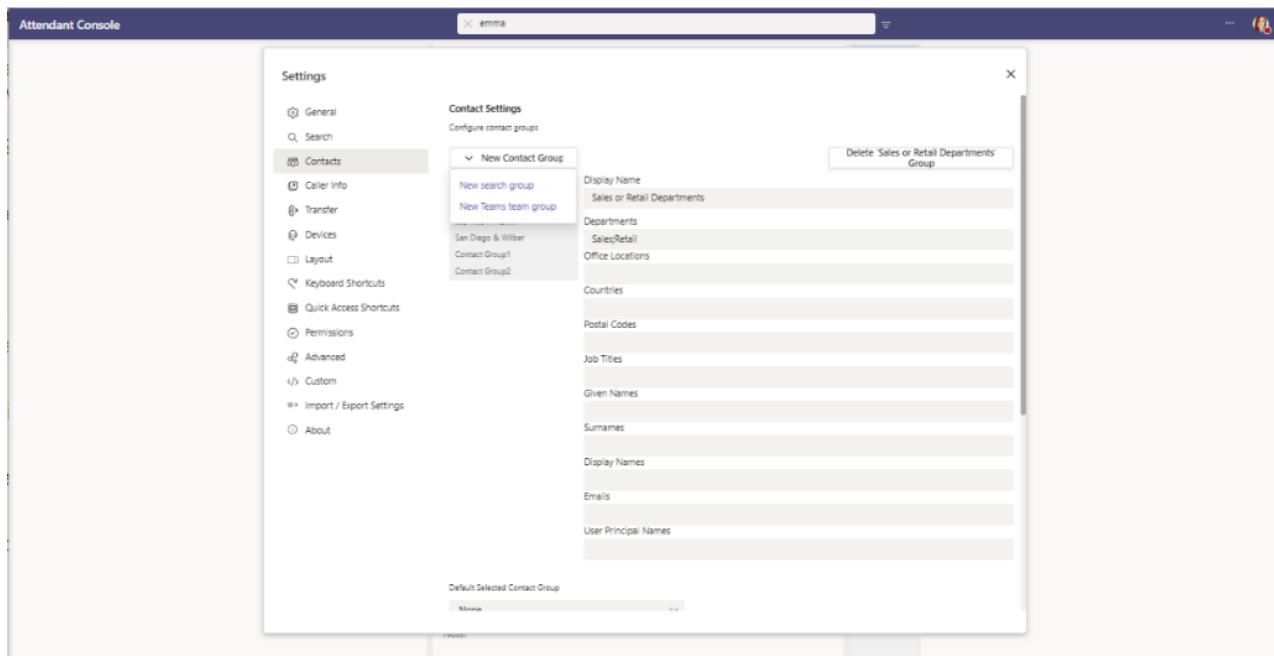
FAQ's

- **Can more than one person log in to answer calls for an organization?**
  Licenses are tied to a DID, so only shared log ins will be able to use one license

- **Do calls come in through Teams as well as the Receptionist Console?**
  If the user had MS Teams open, calls would come through MS Teams and the Receptionist Console. Ensure that calls are answered on your Receptionist Console to utilize the functions, as this will not work if answered in Teams.

- **Can I transfer calls outside of Teams?**
  No, calls can only be transferred inside the organization.