

Webex Receptionist Quick Guide:

The Receptionist client allows you to screen calls, monitor calls and contacts, and monitor calls in a queue.

To sign in:

- Sign in to the Calling User Portal (settings.webex.com)
 - o Navigate to “my apps”
 - Select “receptionist”
 - Choose “cisco sign in” if prompted

Manage Contacts:

- You can create and manage contacts within the client to easily make calls to stored numbers. After a contact has been created, you can update, delete, monitor and add a note to the contact.
 - o From where it’s titled “Contacts” in the middle of the page
 - Select “Personal”
 - Choose “edit” (right hand pencil icon)
 - o Then select “add” to add additional contacts
 - Choose “edit”
 - o You can update or delete contacts here
 - To add a note:
 - o Select the contact
 - Select “notes”
 - o You can see the status of individuals who are added to your favorites list
 - Also, if you select a user from your contact list, they will be added to the “monitored” list which will enable you to view their status.
 - Also, when searching for an individual in the enterprise tab, you can see the status of the individual once searched.

Place a Call:

- There are several ways to place calls. You can dial a number, use the redial option, or select a contact you want to call.
 - o Redial
 - From the left hand menu “Call Console”
 - To the left of the dialer is the button “Redial”
 - o Select the individual wanted to call from the middle menu under “Contacts”
 - o Select “call”
 - o Dial Out
 - From the left hand menu “Call Console”
 - Type a number in the text box entitled “enter number”
 - Select the dialer icon to place the call
 - o Call from Contacts

- Select the contact list under middle menu “Contacts”
 - Select contact
 - Select Call
 - You can also choose to view the call history can call from there
- The active call remains in a menu below the “Call Console” menu pane

Call Handling Properties:

- Place the call on hold, transfer the call, transfer the call to voicemail
 - Place the call on hold:
 - Navigate to the left hand menu titled “Call Console”
 - From this menu pane and while on an active call, select “hold” on the call you would like to place on hold.
 - Select “Answer” to resume the call
 - When answering multiple calls, select “answer” to take a new call. Your original (or first call) will automatically be placed on a hold.
 - Transfer a Call:
 - Navigate to the left hand menu pane titled “Call Console”
 - When on a call, use the dialer text box or use your contact list to call the person you would like to transfer to.
 - Your original call will be placed on an automatic hold
 - If desired, you can announce the call.
 - To transfer without announcing, select “transfer” after dialing the transfer number.
 - Hover over the active call, then select “transfer”
 - Transfer to Voicemail
 - When on an active call, use the dialer to call the person you would like to transfer to, or select the individual from your contacts.
 - From the “contact” menu pane
 - Select the contact
 - Hover over the contact and select “VM”
 - This option is only available if the contact has voice messaging assigned and enabled

Place a Conference Call:

- You can set up multi-party conference calls. Once the conference call begins, you can view participants and remove a participant from the call. Participants can exit the conference leaving others connected. If the organizer (or creator) of the conference call leaves, the call will end for all participants.
 - First, place a call
 - When active on call, place a second call (either from the dialer or from the contacts)
 - Once call connects, select “Conf”

- To remove one caller:
 - Hover over the call
 - Select “end”
- To exit the call and leave other callers on the line:
 - Select “Leave”
- To note: The creator of the conference call ending the call will end the call for all. As a participant in the call, you are able to leave a call without ending the call for others.
 - You can start a conference call with two calls that are already active by selecting one of the calls
 - Hover over the call
 - Select “conference”

Answer a Call:

- Answer a call from your client with one click
 - From the left hand menu pane titled “Console”
 - Select “Answer”

Manage Calls in a Queue:

- With the Receptionist Client, you can manage active calls in a queue. You can monitor call queues in real time (up to five calls), view how long a call has been in the queue, and reorder the priority calls.
 - Navigate to the left hand bottom menu titled “Queued Calls”
 - Select “options” (this is the icon in the far right hand side of the menu pane)
 - Select “Edit Queue Favorites Dialog” (the last option in the menu)
 - Select the check box option next to the name of the queue that you want to monitor under the “monitor” section.
 - Select “save”
 - To pick up a call waiting in the queue:
 - Navigate to the left hand bottom menu titled “Queued Calls”
 - Hover over the call in the “queued calls” menu pane
 - Select “Retrieve”
 - To prioritize calls in a queue:
 - Navigate to the left hand bottom menu titled “queued calls”
 - Hover over the call in the “queued calls” menu pane
 - Select “Reorder”
 - Select “send to front”
 - This call will then be moved to the front of the queue

A good resource for additional help is at: help.webex.com