

Advanced Voice Solutions Upgrade

Overview

LightEdge Solutions will upgrade the Advanced Voice Solutions software platform (from Release 13 to Release 14) on October 28, 2008. A significant benefit of having the AVS hosted communications system is to avoid obsolescence and avoid the responsibility for costly upgrades.

In addition to user and administrative updates, the new platform will provide a greatly enhanced and easier-to-use Receptionist Console. Since this console is software-based, you can upgrade your console at your convenience. Download the software update at **my.lightedge.com** (use your company login credentials), then select the “Products” link, “AVS Hosted PBX” link, and you’ll see a link for the LightEdge Receptionist download.

This document will provide training on the new application. There is also a comprehensive training document that can be accessed from the “Help” link on the receptionist menu. A receptionist can become proficient with this application in very little time!

If at any time you are in need of support, call us at 1(877)771-3343.

Portal Configuration

- There's two important things to check in the user portal before you launch the receptionist console application
- In "Client Applications" on the left, check to be sure you have both "Phone Status Monitoring" and "Broadworks Receptionist"

Advanced Voice Solutions

WELCOME TO LIGHTEDGE SOLUTIONS

Welcome Sue Z-Masterson [\[Logout\]](#)

Options:

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- [Incoming Calls](#)
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- [Call Control](#)
- [Calling Plans](#)
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Client Applications

Basic	Advanced
<p><u>CommPilot Call Manager</u></p> <p>Provide a web-based client for a user instead of using star codes or pressing the flash hook. The client provides a visual, graphical user interface that is used to initiate, manipulate, and release calls.</p>	<p><u>BroadWorks Receptionist</u></p> <p>BroadWorks Receptionist is an advanced Attendant Console designed to meet the specific needs of an operator including advanced call control, contact directories and phone status.</p>
<p><u>Client Call Control</u></p> <p>Provide access to your account for third-party call control applications.</p>	
<p><u>Outlook Integration - Off</u></p> <p>Access your Outlook contact information from your CommPilot Call Manager.</p>	
<p><u>Phone Status Monitoring</u></p> <p>Allows user to manage the list of monitored users to be used by an attendant console application.</p>	

Phone Status Monitoring

Phone Status Monitoring allows you to select members in your group to be monitored using BroadSoft or third party Attendant Console applications.

OK

Apply

Cancel

Enter search criteria below

Last Name

Starts With

+

Search

Available Users

Monitored Users

Add >

Abrams,Chris (5154711249)
Albee,Jim (5154711012)
Bales,Soloman (5154711297)

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Phone Status Monitoring allows you to select members in your group to be monitored using BroadSoft or third party Attendant Console applications.

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Search

Available Users

Monitored Users

Add >

Remove <

Add All >>

Remove All <<

Fortune,Brad (3197302827)
Gehl,Jody (5154711223)
Geneser,Jamie (5154711227)
Gleason,Emily (5154711991)
Gooch,Ben (3097366701)
Grafft,Mike (5154711006)
Hague,Nick (5154711257)
Hann,Brad (3097366702)
Hansen,Scott (5154711013)
Harris,Al (3097366718)
Harris,Kris (3097366714)

Abrams,Chris (5154711249)
Albee,Jim (5154711012)
Bales,Soloman (5154711297)
Bauer,Shad (5154711269)
BCC Cage,Edge (5154711018)
Beckman,Jeremy (3197300969)
Bellon,Shane (5154711246)
Bennett,Jason (5154711060)
Berkley,Amanda (5154711121)
Bertram,Shanna (3097366720)
Bickford,Maggie (3097366715)

- “Phone Status Monitoring” establishes your “Monitored” list in the Receptionist Console
- Hit the “Search” button to populate all options in the “Available Users” box
- Drag users from left to right to add them to the Monitor directory
- Check back as new users are added to your system to be sure your directory is up to date

Log In Screen

LightEdge Receptionist

File Tools Help

Username 5154711313

Password

Remember Me (Forget Me)

Remember my Password

Sign me in automatically

Sign In

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- Once you have downloaded, installed, and launched the application, this is the resulting login screen
- Use the same login credentials as for the portal

Main Screen

Switchboard Panel

Directory Panel

Status	Last Name	First Name	Phone	Mobile	Title	Department
	Conference	17th	5154711009			
	Conferencing	Edial	3197302828			
	Bryant	Colin	6122522318	612-600-6813		Sales
	BLF					PD
	Curless	Dale	3097066709	309-721-1794	Sales Consult...	Sales
	Craig	Nick	5154711291	6414949366		NOC
	Wouters	Todd	5154711311	515-867-6266		Engineering
	Conference	Capitol	5154711231			Conference R...
	Cisco - Test	xJody	5154711233			
	Dale	Amanda	5154711255			HR

Options Panel

Control Panel

Monday, October 13, 2008 9:45 AM

- The Receptionist has 4 different panels
- 1--Switchboard
- 2--Contact Directory
- 3--Options
- 4--Control

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Switchboard Panel

- The “Switchboard” panel is where all calls are handled
- Here is an example of an “Incoming” call that has been answered, and status changes to “Active”

The image displays two screenshots of the LightEdge Receptionist software interface, illustrating a call status change. The top screenshot shows a call with the status 'Incoming' (in red text) and a duration of 00:03. A red arrow points to the 'Incoming' status. The bottom screenshot shows the same call with the status 'Active' (in green text) and a duration of 00:04. A red arrow points to the 'Active' status. The interface includes a menu bar (File, View, Actions, Tools, Help), a 'Full Screen' checkbox, and a table with columns for Link, Line, Call To, Call From, Status, and Time. The status column is highlighted in the screenshots. The interface also features a 'SWITCHBOARD' label on the left and 'COMPANY NOTES' and 'COMPANY PROFILE' labels on the right. At the bottom, there are icons for Personal Directory, Speed Dials, Outlook Directory, Contact Directory, and Monitored Contacts, along with a grid of letters A, B, C, D, E, F, G, H.

Link	Line	Call To	Call From	Status	Time
	1		3037855357 (...)	Incoming	00:03

Link	Line	Call To	Call From	Status	Time
	1		3037855357 (...)	Active	00:04

Contact Directory Panel



- There's a lot going on with the directory panel
- Notice the "tabs" across the top
- You can select the tabbed directory you want to view

Status	Last Name	First Name	Phone	Mobile	Title	Department
	Conference	17th	5154711009			
	Conferencing	Edial	3197302828			
	Bryant	Colin	6122522318	612-600-6813		Sales
	BLF	Jed	5154711113			PD
	Curless	Dale	3097366709	309-721-1794	Sales Consult...	Sales
	Craig	Nick	5154711291	6414949366		NOC
	Wouters	Todd	5154711311	515-867-6266		Engineering
	Conference	Capitol	5154711231			Conference R...
	Cisco - Test	xJody	5154711233			
	Dale	Amanda	5154711255			HR

- Tab Explanations:
- "Contact Directory" is all users in your group
- "Monitored Contacts" corresponds to the list you created in "Phone Status Monitoring" in your portal
- "Personal Directory" is your personal directory created in your portal
- "Speed Dials" is your personal speed dial list
- "Outlook Directory" is your personal Outlook contact list

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- Take a look at the “Status” icons on the left

The screenshot shows the 'CONTACT DIRECTORY' window with a list of contacts. The columns are Status, Last Name, First Name, Phone, Mobile, Title, and Department. The status icons are green handset-down symbols. A red arrow points to the status icons.

Status	Last Name	First Name	Phone	Mobile	Title	Department
	Conference	17th	5154711009			
	Conferencing	Edial	3197302828			
	Bryant	Colin	6122522318	612-600-6813		Sales
	BLF	Jed	5154711113			PD
	Curless	Dale	3097366709	309-721-1794	Sales Consult.	Sales
	Craig	Nick				
	Wouters	Todd				
	Conference	Capitol				
	Cisco - Test	xJody				
	Dale	Amanda				

- These are all the “status” icons you might encounter

Status	Icon	Description
Green Handset Down		Contact phone is on-hook (available to receive a call) (previously this was a green triangle).
Red Handset Up		Contact phone is off-hook (on a call, busy) (previously this was a red triangle).
Orange Handset Down		Contact phone is ringing (previously this was a blue triangle).
Do Not Disturb		Contact phone has status set to DND (previously this was an orange triangle).
Grey Handset Down		Contact phone state is currently unavailable or unknown (previously there was no triangle or it was blank).
Private		Contact phone state is set to “private”.
Call Forward Always		Contact has the Call Forward Always service turned on. By hovering your mouse over the contact, the user can see the phone number the contact has set the Call Forward to.

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- There are two views of the directory
- “Detail” view or “List” view
- “List” view compresses more users into the same area, but “Detail” view provides more information on each user

The screenshot displays the Outlook 2007 interface with the Outlook Directory window open. The window is titled 'CONTACT DIRECTORY' and shows a list of contacts in 'List' view. The columns are labeled 'Mobile', 'Title', and 'Department'. The contacts listed are:

Mobile	Title	Department
612-600-6813		Sales
		PD
309-721-1794	Sales Consult...	Sales
6414949366		NOC
515-867-6266		Engineering
		Conference R...

At the bottom right of the Outlook Directory window, there is a view selector with two options: 'Details' (unselected) and 'List' (selected). A red arrow points to this selector.

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- In “Detail” view, each column can be sorted by clicking on the column header (i.e. “Last Name”)

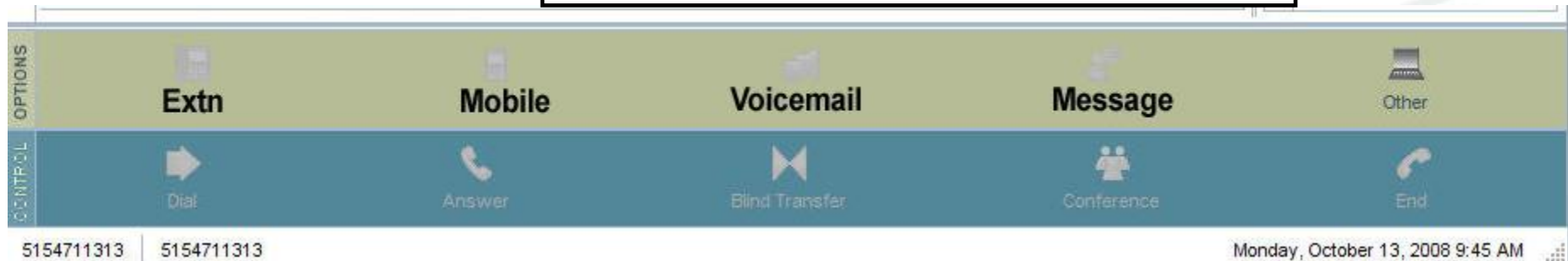
Status	Last Name	First Name	Phone	Mobile	Title	Department
☎	Conference	17th	5154711009			
☎	Conferencing	Edial	3197302828			
☎	Bryant	Colin	6122522318	612-600-6813		Sales
☎	BLF	Jed	5154711113			PD
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☎	Wouters	Todd	5154711311	515-867-6266		Engineering
☎	Conference	Capitol	5154711231			Conference R...
☎	Cisco - Test	xJody	5154711233			

Status	Last Name	First Name	Phone	Mobile	Title	Department
☎	Eckerman	Josh	5154711125			OSS
☎	Edgeview	Test Line	3197300900			
☎	Elder	Dan	3097366710	563-370-26...		NOC

- Once a column is selected, then use the “Alphabetical Index” on the right to further sort by alphabet
- In this example, the last name column was selected, then “E” was selected from the index to draw out all last names beginning with “E”
- Clicking the alphabet a second time restores the original view

Option and Control Panels

- The next two panels are the “Options” and “Control” panels at the bottom of the screen
- The icons are dimmed until they are legitimate choices
- Think of “Options” as “Where you want to go...”
- Think of “Control” as the execution of the “where” pick above



- Next we'll review real call scenarios and how to manage calls

Transferring Calls

Blind Transfer

1. Switchboard Panel: Answer Call
2. Directory Panel: Select Name. Once you select a name in the directory, you see all the legitimate choices highlighted in the "Options" and "Control" panels
3. Options Panel: Decide where to transfer the call (options are Extension, Mobile, Voice Mail, Message, or Other)
4. Control Panel: Click the Blind Transfer button to transfer the call.

The screenshot displays a software interface for call management. At the top, a call log shows an active call to 3037855357 with a duration of 00:28. Below this is a contact directory with columns for Status, Last Name, First Name, Phone, Mobile, Title, and Department. The contact Marv Crawford is highlighted. To the right of the directory is an alphabetical index. At the bottom, there are two rows of control buttons: 'Options' (Extn, Mobile, Voicemail, Message, Other) and 'Control' (Dial, Hold, Blind Transfer, Conference, End). The interface also includes a search bar, a 'Full Screen' button, and a status bar at the bottom showing the current time and date.

Status	Last Name	First Name	Phone	Mobile	Title	Department
	Beckman	Jeremy	31973009...	319-210-...		NOC
	Downey	Jeff	30973667...			
	Z-Master...	Sue2	51547113...			
	BLF-Sch...	Jedidiah	51547110...			
	Crawford	Marv	40240829...	40232029...	TAM	Sales
	Williams	Trevor	31973009...			Sales
	Eckerman	Josh	51547111...			OSS

Options: Extn, Mobile, Voicemail, Message, Other

Control: Dial, Hold, Blind Transfer, Conference, End

5154711313 | 5154711313 Monday, October 13, 2008 10:09 AM

Consultative Transfer

1. Switchboard: Answer Call
2. Directory: Select Name for transfer
3. Options: Select "Extn"
4. Control: Select "Dial" (instead of "Blind Transfer") This places the first call on hold and establishes a second call in the Switchboard (you'll need to answer your invite signal)
5. New Control Panel: Your control panel has now changed to show a "Consulted Transfer" option, along with a "Conference" option

Speed Dials Outlook Directory

Monitored Contacts

First Name	Phone	Mobile	Title	Department
Jeremy	31973009...	319-210-...		NOC
Jeff	30973667...			
Sue2	51547113...			
Jedidiah	51547110...			
Marv	40240829...	40232029...	TAM	Sales
Trevor	31973009...			Sales
Josh	51547111...			OSS

ALPHABETICAL INDEX

A	B	C	D
E	F	G	H
I	J	K	L
M	N	O	P
Q	R	S	T
U	V	W	X
Y	Z		

Eckerman

All

Options: Extn, Mobile, Voicemail, Message, Other

Control: Dial, Hold, Blind Transfer, Conference, End

All

Options: Extn, Mobile, Voicemail, Message, Other

Control: Dial, Answer, Consulted Transfer, Conference, End

Transfer linked calls: 3037855357 & 1317

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Camp On

- Camp on is a great feature for holding a call for someone while that person is on another call. When the person becomes available, the call is automatically delivered
- Notice that the person selected for transfer is on a call (the off-hook icon)
- When that person is selected, there is a new option in the "Control" panel to Camp the call

The screenshot displays a call center software interface. At the top, a window titled 'Receptionist' shows a call log with columns for Line, Call To, Call From, Status, and Time. The first entry shows Line 1, Call From 3037855357 (...), Status Active, and Time 00:09. Below this is a 'CONTACT DIRECTORY' window with a table of contacts. A red arrow points to the contact 'Z-Maste... Sue2' with phone number 51547113... and an off-hook icon. To the right of the directory is an 'ALPHABETICAL INDEX' grid. At the bottom is a 'CONTROL' panel with icons for Dial, Hold, Camp-On, Call Barge-In, and End. A red arrow points to the 'Camp-On' icon. The status bar at the very bottom shows the number 5154711313 and the date/time 'Monday, October 13, 2008 10:10 AM'.

Last Name	First Name	Phone	Mobile	Title	Department
Beckman	Jeremy	31973009...	319-210-...		NOC
Downey	Jeff	30973667...			
Z-Maste...	Sue2	51547113...			
BLF-Sch...	Jedidiah	51547110...			
Crawford	Marv	40240829...	40232029...	TAM	Sales
Williams	Trevor	31973009...			Sales
Eckerman	Josh	51547111...			OSS

A	B	C	D
E	F	G	H
I	J	K	L
M	N	O	P
Q	R	S	T
U	V	W	X
Y	Z		

CONTROL PANEL: Dial, Hold, **Camp-On**, Call Barge-In, End

STATUS BAR: 5154711313 | 5154711313 | Monday, October 13, 2008 10:10 AM

HIGHLIGHTEDGE

- The switchboard now shows the call as “Camped”
- Note the new icon in the “Control” panel to “Uncamp” the call
- At about :55 seconds, the “Camped” status in the Switchboard will begin to flash as an indicator that the call has been holding for awhile
- “Uncamp” the call to check with the caller for continued holding, at that point the call can be directly transferred to voice mail (select “Voicemail” from the “Options” list

The screenshot displays a call management interface. At the top, a call log table shows a call from 3037855357 with a status of 'Camped (Z-...' and a duration of 00:35. A red arrow points to this status. Below the call log is a 'CONTACT DIRECTORY' window with a table of contacts. A red arrow points to the 'All' filter button in the directory. At the bottom, there are two panels: 'OPTIONS' and 'CONTROL'. The 'CONTROL' panel includes an 'Uncamp' button, which is highlighted by a red arrow. The 'OPTIONS' panel includes buttons for 'Extn', 'Mobile', 'Voicemail', 'Message', and 'Other'. The status bar at the bottom shows the number 5154711313 and the date/time: Monday, October 13, 2008 10:10 AM.

Call To	Call From	Status	Time
	3037855357 (...)	Camped (Z-...	00:35

Status	Last Name	First Name	Phone	Mobile	Title	Department
	Beckman	Jeremy	31973009...	319-210-...		NOC
	Downey	Jeff	30973667...			
	Z-Maste...	Sue2	51547113...			
	BLF-Sch...	Jedidiah	51547110...			
	Crawford	Marv	40240829...	40232029...	TAM	Sales
	Williams	Trevor	31973009...			Sales
	Eckerman	Josh	51547111...			OSS

Options
Extn
Mobile
Voicemail
Message
Other

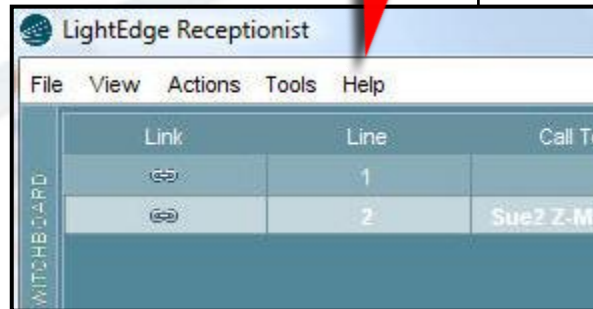
Control
Dial
Answer
Uncamp
Call Barge-In
End

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User Guide

- A comprehensive user guide can be found via the “Help” option on the menu



LightEdge Support:

1.877.771.3343

