

# Anywhere365 Attendant for Teams

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# 1 Table of Contents

1	Tabl	e of C	Contents	. 4	
2	Note to the reader				
3	Login				
4	The	Attend	dant main screen	10	
	4.1	Resiz	zing the panels	11	
	4.2	Full s	creen mode	11	
5	The	conta	ct list	12	
	5.1	View	modes in the contact list	12	
	5.1.1	1	Default mode: Recently used contacts	12	
	5.1.2	2	Favorites mode	12	
	5.1.3	3	Search mode	13	
	5.1.4	1	Title bar text depending on the mode	14	
	5.2	Viewi	ing the details of a contact	15	
	5.3	Multip	ple columns	15	
	5.4	Conta	act types	16	
	5.5	Prese	ence	16	
	5.6	Action	ns in the contact list	17	
	5.7	Mana	aging your favorites	18	
	5.7.1	1	Adding a favorite	18	
	5.7.2	2	Removing a favorite	19	
	5.7.3	3	Displaying favorites	19	
	5.7.4	1	Sorting favorites	19	
	5.8	Searc	ching and filtering	21	
	5.8.1	1	Searching a contact	21	
	5.8.2	2	Filtering contacts from the filter menu	23	
	5.8.3	3	Saving search queries	25	
	5.8.4	1	Advanced search	26	
	5.9	Editir	ng contacts	28	
	5.9.1	1	Adding a contact	28	
	5.9.2	2	Editing a contact	29	
	5.9.3	3	Deleting a contact	30	
	5.10	Grou	p contacts	31	
	5.10	.1	Filtering group contacts	31	
	5.10	.2	Adding a group contact	31	
	5.10	.3	Editing a Group contact	33	
	5.10	.4	Deleting a contact	34	
	5.11	Conta	act Sources	35	
	5.11	.1	Filtering contact sources	35	
	5.12	Send	ling an email to a contact	36	
	5.12	.1	Opening the email form in a new window	38	
	5.13	Makir	ng a contact note	38	
6	Call	functio	onality	41	
	6.1	Conn	nection with the server	41	
	6.2	Call s	states, destination and call actions	41	

	6.2.	1	Call states	42
	6.2.2	2	Destination information	42
	6.2.3	3	Call actions	42
	6.2.4	4	Greyed out pickup button	43
	6.2.	5	Rejoin pickup button	43
	6.2.	6	Force hang up calls	44
6	.3	Tran	sferring a call	44
6	.4	Wor	king with queue calls	46
	6.4.	1	Answering an incoming queue call	46
	6.4.2	2	Toggling visibility of all monitored queues	47
	6.4.3	3	Toggling visibility of a single queue	48
6	.5	Calli	ng or transferring to other numbers of a contact	48
	6.5.	1	Calling to other numbers of a contact	48
	6.5.2	2	Transferring to other numbers of a contact	49
7	Atte	ndant	status	51
7	.1	Pres	ence	51
7	.2	Do r	ot disturb	51
8	Pers	sonali	zing the Attendant	52
8	.1	Inter	face preferences	52
8	.2	Con	versation settings	55
	8.2.	1	Calling Identity	55
	8.2.2	2	Audio Alerting	56
	8.2.3	3	Calling timeout	56
9	Key	board	navigation	57
10	Wid	gets		58
1	0.1	Мах	imizing and restoring	58
1	0.2	Mov	ing the widgets around	58
1	0.3	Addi	ng a widget	59
1	0.4	URL	Placeholders for widgets	61
	10.4	.1	Calendar widget	62
	10.4	.2	Contact information widget	62
	10.4	.3	Contact note widget	62
	10.4	.4	Homepage widget	63
	10.4	.5	Microsoft Dynamics CRM widget	63
	10.4	.6	Twitter widget	64
	10.4	.7	Web Page widget	64
11	Help	o func	tion	66
1	1.1	Atter	ndant version	66
1	1.2	Key	poard shortcuts	66
1	1.3	Usei	Manual	66
1	1.4	Appl	ication messages	66
1	1.5	Wha	t's new	67
1	1.6	Lice	nse	67
12	Sigr	out.		68
13	Glob	oal co	nfiguration	69

13.1	Mail		69
13.2	Conr	nectors	70
13.2	2.1	Microsoft Dynamics CRM	71
13.3	Call	Queue	72
13.3	3.1	Call settings	72
13.3	3.2	Overflow handling for call queues	72
13.4	Spec	ific configuration in tenant	74
13.5	User	privileges	74
13.	5.1	User privileges for admin portal access	74
13.	5.2	User privileges for Group contact access	76
13.6	Main	tain callback mail template	78
13.0	6.1	Adding a new mail template	79
13.0	6.2	Arranging the order of mail templates	80
13.0	6.3	Changing or deleting a mail template or creating a new one	80
13.7	Musi	c on hold	80
13.	7.1	Uploading own music on hold	81
13.	7.2	Managing music on hold files	81
13.	7.3	Select music on hold for a queue.	82
13.8	Cont	act sources	83
13.8	8.1	Admin consent	84
13.8	8.2	Adding or changing a contact source	84
13.8	8.3	Deleting a contact source	85
13.8	8.4	Supported file formats	85
14 Cha	ange h	istory	88

# 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.

Sign in	
Email, phone, or Skype	
No account? Create one!	
Can't access your account?	
Sign-in options	

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:

User information and the menu	🚓 All (All devices) 🎎 Unsvalable 🔹 Monica 64 (64111) 🗞 Away 🗖
Homepage (F9)	C2
G Homepage	
Detail area, starting with the homepage	
	User information and the menu Homesupe (7) Detail area, starting with the homepage

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.

Anywhere365 Attendan	t Console						🚓 All (All d	evices) 🏭 Unavail	able 🛔 Monica 64 (6	(4111) 9 <mark>0</mark> Away 🗖
Conversations (F2)			Conversation details (F3)							ß ×
Operator 64 (64101)		0	Operator 64 (64101)	one a mang						2 ت
			& Contact Information		i E cuit fi	aw.				8
			First name	Operator		Date and time		esson Cestinati	10	Duration
			Lastname	64		31-03-2021 12:00	0	irest 0		0.06
			Primary phone number	64101	C-	91-03-2021 12:00		Operator	64 (64101)	
			Note		10-	31-03-2021 12:00		Monice 6	4(64111)	
					¢-	81-03-2021 12:00		Operator	54 (64101)	
				Conversation of	leta	C03-2021 11:58		Operator	64 (64101)	
				conversation	6.	31-03-2021 09:49		Operator	54 (64101)	
					C+	30-03-2021 10:09		Operator	64 (64101)	
Describer of a starter (TC)		0. ~ 7			C+	90-03-2021 10:09		Operator	64 (64101)	
Recently used contacts (F6)		D. M. I			C+-	26-03-2021 14:25		Morrison 6	4(64111)	
O beauti for contants					¢.	26-63-2021 14:22		Monica 6	4(64)11)	
-					¢+	26-03-2021 10:10		Орниног	54 (64101)	
JohnBas 64	Operator 64		Contact details (F7)							c' x
Operator 51	John 52		Operator 64 (6-f107)	one is singing						
05 da	🐨 🖝 🖬		& Contect information	-	Calen	Sar				8
Monica 52	Operator 52		First name	Operator	TYDER C	ay Lin		Mar 29 - Apr 2, 2021		× × 1660
	2 a		Last name	64	W 13	Mart 3/25	Tue 3/30	Wed 3/21	Thy 6/1	FH 4/2
John 53	Monica 53		Primary phone number	64101	06.00					
					07.00			Calendar not available		
Operator 53	George 54		Now		00:90					
Sec. 20	GP. 2		teetye		00.95					
John 54	Monica 54			Contrast data:	15:00					
				Contact detail	S 11.00					
Operator 54	P6 Peter 55				12:00					
					12:00					
Monica 57	Operator 57				14:00					
and the second	-				10.00					
· · · · · · · · · · · · · · · · · · ·			-1-							

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):

Anywhere365 Attendant Console				🚓 All (All devices) 🎒 Unavailable 🛔	Monica 64 (64111) 90 Away 🗖
Conversations (F2)	So Conversation details (F3)				G ×
Operator 64 (64101)	- Operator 64 (64107)	() Those is ringing			. 💿 💿
Control Contro	Contact Information		E Call flow		8
	First name	Operator	Date and time	Reason Dectination	Duration
	Lastname	64	31-03-2021 12:00	Direct ()	0.06
	Primary phone number	64101	C+ \$1-05-2021 12:00	Operator 64 (64101)	
	Nitte		¥+ 91-03-2021 12:00	Morrice 64 (64111)	
			C+ 81-03-2021 12:00	Operator 64 (64101)	
	and a		C+ 31-63-2021 11:58	Operator 64 (64101)	
			C+ 01-03-2021 09-49	Operator 64 (64101)	
			C+ 30-03-2021 10:09	Operator 64 (64101)	
			C+ 20-03-2021 10:09	Operator 64 (64101)	
Recently used contacts (F6)	D' 14 4		C+ 26-03-2021 14.25	Manice 64 (54111)	
O based for correct			C* 26/03/2021 14/22	Monica 64 (64111)	
A beautite caracter	··· .		C* 28-05-2021 10 10	Operator 64 (64101)	
Un JohnBas 64	Contact details (F7)				C ×
Operator 51 John 52	Operator 64 (64101)	Phone is singing			
	S Contect information		🗎 🗂 Celender		8
Monica 52 Operator 52	First name	Operator	Wold Day Lim	Mai 29 - Apr 2, 2021	5 5 Think
•••	Lastnerne	64	W 13 Mart 3/25	Tue 3/30 Wed 3/21	Thu 6/1 Fri 4/2
John 53 Monica 53	Primary phone number	64101			
•••	Note		0.00	Calandar not anaradia	
Operator 53 George 54	tertie		0.00		
	700.5		09.00		
John 54 Monica 54			10.00		
			11.00		
Operator 54 Peter 55			*12:00		
	U		12:00		
Monica 57 Operator 57	Ĩ		14.00		
· · · · · · · · · · · · · · · · · · ·			10.00		

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:

$\sim$

# 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.

Recen	Recently used contacts (F6) $\[mathbb{L}^+ \[cm]{C} \[cm]{C} \]$				
Q s	Search for contacts				
	H				
KD	Karin Driel				
	Tim Field Bales	🗷 🕓			
	Sebastien Frabot PeterConnects A365 Group - Sales				
06	Olaf Gueldenpfennig Bales				
AH	Arjen Holleman				
8	Jacqueline Portier				
1	Stephen Postma				

# 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".

Favori	ite contacts (F6)	≗+ ★ 7
Q	Search for contacts	0 0 0 0 0 0 0 0 0
	Tim Field 🗒 🚖 Sales	🖂 🕓
	Sebastien Frabot 🏢 🚖 PeterConnects A365 Group - Sales	2.
1	Norbert de Bruijn 🏢 🚖 <sup>Sales</sup>	
•	Stephen Postma 🔢 🚖 Testing	

# 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.

Search results (F6) 온+ ♡ …				
Qp	pet	× ‼		
	Sebastien Frabot III 🔶 PeterConnects A365 Group - Sales			
RA	Reema Apsingekar 🏢 ाт			
	PeterConnects Office			
	Sebastien Office France PeterConnects A365 Group - Sales	🗷 🕓		
	PeterConnects Office UK			
	Peter Pan Quality Assurance			

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:

Filtered search results (F6)	<u>۲</u>
------------------------------	----------

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

Search results (F6)	8+ 7
---------------------	------

# 5.2 Viewing the details of a contact

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

Anywhere365 Attendant Console				All (All devices)	)•••• 👫 Sign-In 🛔 Me	ilissa van Dijk (6411	1) 🖓 Offline 🗖
Conversations (F2)	% Homepage (F9)						Ľ
	C Homepage						
No spret conveniena			$\mathbf{O}$				
Recently used contacts (F6) 🛛 😫 🕸 🕅	··· Contact details (F7)						2 ×
Q Bearch for contacts	Tim Field						
PCa Bot	& Contact information		🖬 🛱 Calendar				
	First name	Tim	Day List	Mar	29 - Apr 2, 2021		* = Tider
Marc Derksen	Last name	Field	W 13 Mon 3/29	Tus 3/30	Wed 3/31	Thu 4/1	Fri 4/2
.e II	Business E-mail address	tim @pcadev.net	: 06/00				
Karla Driel	Function	Regional sales manager	07:00	Unable to	tettieve calendar data		
KI RAD	Department	Sales	08:00				
Tim Field		Contact de	tail area				_
Sebastien Frabot 💌 💌			11:00				
Olaf Gueldenpfennig			12:00				
Arjen Holleman			15:00				
Jacqueline Portier			16:00				

# 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



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

In F6, the	buttons "Edit Contact Note"	and "Add to Favorites"	are in the drop-	down menu.
Dy	Dorette Verhoeven PeterConnects - Software O	ntwikkeling	છ 📞	
MS	Martijn Schotel			

# 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:

Contact details (F7)							r x
Tim Field							<mark>- 0 C</mark>
S Contact Information	Î	🖬 📋 Cale	endar				
First name	Tim	Week	Day List	Mar	29 – Apr 2, 202	21	< > Today
Last name	Field	W 13	Mon 3/29	Tue 3/30	Wed 3/31	Thu 4/1	Fri 4/2
Business E-mail address	tim@pcadev.net	06:00					
Function	Regional sales manager	07:00		Unable to	retrieve calendar	data	
Department	Sales	08:00					
		09:00					
		10:00					

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:

Contact details (F7)								ď	×
Stephen Postma (	+ <i>3110111111111)</i> e Olde						9	R	٩
음 Contact information	ji ji	🗌 📋 Cal	endar						
First name	Stephen	Week	Day List	Mar	29 – Apr 2, 202	21	< >	Toda	iy
Last name	Postma	W 13	Mon 3/29	Tue 3/30	Wed 3/31	Thu 4/1	1.3	Fri 4/2	
Business E-mail address	stephen.postma@pcadev.net	06:00							

## 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:

	Sebastien Frabot III 🚖 PeterConnects A365 Group - Sales
OG	Olaf Gueldenpfennig Ji Sales
AH	Arjen Holleman
	Jacqueline Portier
	Stephen Postma 🎚 🚖 Testing
ВУ	Bram Vader

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:

Search results (F6)	≗+ 7
Q mar	×
Marc Derksen	
GM Gijs Maris	🛛 🐵 🚯 🕓
Martijn Schotel	
Marko Virtual	

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 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 is leading. 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 User management of Microsoft 365 admin center.

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:

Search results (F6)	음+ 7
<b>Q</b> 2222	× ‼
Dial 2222 Unknown 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  $\blacksquare$ .

Search results	(F6)			8+ 7
<b>Q</b> 2222				
	1	2 ABC	3 DEF	
	<b>4</b> GHI	5 JKL	6 MNO	
	7 PQRS	8 TUV	9 wxyz	
	*	0	#	
Dial 2222				
Unknown n	umber			<u>ی</u> (۹) (۹)

# 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.

Filtered contacts (F6)	음+ ▼ …
	🖌 💄 Personal contacts
Q Search for contacts	🕢 📱 Corporate contacts
Marc Derksen	🕢 🛃 External contacts
🛬 🖩 🛨	

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

Filtere	d contacts (F6)		8+ 1	<b>r</b>
Q	earch for contacts			
A	Amalia Janson			
A	Antoinette Daily 🚥 🔁	00	ห	C
J	Justin Hoffman			
s	Stephen Jones			

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: *W*, 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:

Filtered search results (F6)			≗+ ▼ …
		•	Personal contacts
Q mon	$\cap$		Corporate contacts

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

Filtered search results (F6)	음+ 🍸 …
Q mort	×®
Monica Anderson	💌 🕓
Monica Ross	
Monica Sewell	

**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:

	×
🕼 Search query	
Name	
Search	
mon source:Personal	
	Clear Save

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:

0	E Queues	
•	(All contacts)	Ľ
0	원 (Personal MON)	
~		

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 *L*. 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  $\square$ . 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=""></no>	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:

Contact details (F7)	
MarkoVirtual (+31101234567)	
Contact information	=
First name	Marko
Last name	Virtual
Email	markovirtual@pcadev.net
Primary number	+31101234567
Mobile number	+31612345678
Function	Senior Tester
Department	Quality Assurance
Organization	Anywhere365
Building	Headquarters
Street of building	Virtualstreet 1
Postal code of building	3144 EJ
City of building	Maassluis
Country	Nederland
State or province	Zuid:Holland
Name of manager	Peter Pan

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 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.



Demonstrate	×
Personal contact	
*Name	
*Primary phone number	
	Save

# Another way to add a contact is: 1. Search for a number in th

Search results (F6)	2+ V
Q 234098798734	× 🛯
Dial 234098798734 Unknown number	
No results	

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.

Search results (F6)	8+7	Contact details (F7)		
Q 234098798734	× 🛛 👯	(234098798734)		
Dial		2 Contact information		ä
234098798734 Unknown number	<u> </u>	Primary phone number	234098798734	
No results				

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:



Filtered contacts (F6)	≙+ ▼	Contact details (F7)	
Q Bearch for contacts		James Summer (12665) ▲★	
James Summer •••	S C	Name James Summer	
Albert Einstein		Primary phone number 12665	_
Arman Jamesson			

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.

	JIIIaCI		
*Name			
James Summer			
*Primary phone numb	er		
12665			
-			

#### 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.

Filtered contacts (F6)	≗+ ▼ …	Contact details (F7)		
Q Bearch for contacts	6	James Summer (12	2665)	
lamos Summar		은 Contact information		
	· 🖂 🕓 🛛	Name	James Summer	Ø
Albert Einstein		Primary phone number	12665	
Arman Jamesson				

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

Dereand contact	
Personal contact	
*Name	
James Summer	
*Primary phone number	
12665	
	Sav

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

Personal contact	
*Name	
James Summer	
*Primary phone number	
12665	
a you want to delate this item?	Vos

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

# 5.10 Group contacts

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

### 5.10.1 Filtering group contacts

You can filter on Group contacts in the filter menu.

			음+ ☆ 🏹	
_	$\bigcirc$	-	Personal contacts	1
	$\checkmark$	**	Group contacts	-
	$\bigcirc$		Corporate contacts	0
ssi	$\Box$	2.	External contacts	
	$\bigcirc$	**	Queues	1

#### 5.10.2 Adding a group contact

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

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



4. Now, a pop-up appears. Select 'Group contact' and enter the data of the new Group 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.

	×
La Contact	
O Personal 💿 Group	
*Name	
Email	
*Primary number	
Mobile number	
Function	
Department	
Organization	
	Save

#### Another way to add a contact is:

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

Search results (F6)	≗+ ∀
Q 234098798734	× 🖻 🛄
Dial 234098798734 Unknown number	
No results	



5. 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.

Search results (F6) 음+ V	Contact details (F7)
Q 234098798734 🗙 🐻 👯	(234098798734)
Dial 234098798734 🖂 🕓 Unknown number	Primary phone number     234098798734
No results	

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

#### 5.10.3 Editing a Group contact

When you want to edit a Group 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:

Filtered contacts (F6)	≗+ ▼ …	Contact details (F7)		
Q Bearch for contacts		James Summer (12665)	5)	
James Summer		Contact information		
💛 🛶		Name	James Summer	ľ
Albert Einstein		Primary phone number	12665	
Arman Jamesson				

The contact pop-up appears. You can edit the contact, including changing it from Group contact into Personal contact. You can also convert a Personal contact into a Group 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.

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	×
Contact	
O Personal 🛛 🖲 Group	
*Name	
Shared contact	
Email	
sharedcontact@test.com	
*Primary number	
+31987654321	
Mobile number	
+31612345678	
Function	
QA engineer	
Department	
QA	
Organization	
Anywhere365	
Save	the second second

## 5.10.4 Deleting a contact

To delete a Group 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.

Filtered contacts (F6)	≗⁺ ▼ …	Contact details (F7)		
Q Bearch for contacts	6	James Summer (1266	5)	
		은 Contact information		
	🖻 🕓	Name	James Summer	
Albert Einstein		Primary phone number	12665	
Arman Jamesson				

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

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Contact Personal Group Name Can be deleted Email nolongerneeded@test.com Primary number +1234567890 Mobile number Function Department Organization		×
<ul> <li>Personal ● Group</li> <li>*Name</li> <li>Can be deleted</li> <li>Email         nolongerneeded@test.com         *Primary number         +1234567890</li> <li>Mobile number</li> <li>Function</li> <li>Department</li> <li>Organization</li> </ul>	Le Contact	
*Name Can be deleted Email nolongerneeded@test.com *Primary number +1234567890 Mobile number Function Department Organization	O Personal	
Can be deleted Email nolongerneeded@test.com *Primary number +1234567890 Mobile number Function Department Organization	*Name	
Email nolongerneeded@test.com *Primary number +1234567890 Mobile number Function Department Organization	Can be deleted	
nolongerneeded@test.com *Primary number +1234567890 Mobile number Function Department Organization	Email	
*Primary number +1234567890 Mobile number Function Department Organization	nolongerneeded@test.com	
+1234567890 Mobile number Function Department Organization	*Primary number	
Mobile number Function Department Organization	+1234567890	
Function Department Organization	Mobile number	
Function Department Organization		
Department Organization	Function	
Organization	Department	
Organization	Department	
Di Sav	Organization	
Sav	<u>م</u>	
		Save

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

'Name	
James Summer	
Primary phone number	
12665	

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.



2+ ▼	:		
(D	~	-	Personal contacts
٩		***	Group contacts
	$\checkmark$	Ħ	Corporate contacts
			External contacts
	$\checkmark$		Queues
	$\checkmark$	×	Excel Contacts
	~	$\bigstar$	Star Wars

# 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.

Recently used contacts (F6)		음+ ☆ 7	
<b>Q</b> Bearch for contac	ts	0 0 0 0 0 0 0 0 0 0	
Karin Driel			
Tim Field			
Sebastien F	rabot Connects A365 Group - Sales	5	
			Then the send

will be shown. Here you can enter your email.
Attendant for Teams

		Ľ
Mail Template	Callback reminder (English)	•
Callback number	52111	•
Send to	any.one@anywhere36\$com	
Subject	Please call back: Monica 52 52111	
Message	Missed call from: Monica 52 52111 Subject:	
	Kind regards,	
	Operator 62	
	Email: operator62@bw.dev.onpeterconnects.com Phone: 62101	1,

The form contains the following fields:

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There are one or more mail templates configured. Each can be in another language. Mail Template 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. Callback number 55131 -55111 Send from 55131 Send to (None) 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. The content of the mail. The message will contain a predefined text with the data of the Message 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.

Contact details (F7)				2 ×
Tim Field				
Contact information		Calendar		
First name	Tim			
Last name	Field	07:00	Unable to retrieve calendar data	
Business E-mail address	tim@pcadev.net	08:00		

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.

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Note	×
Tim does not work on <u>fridays</u>	
	Save

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.

Contact details (F7)			C ×
Tim Field			
& Contact information		Contact notes	8
First name	Tim		
Last name	Field	Note	
Business E-mail address	tim@pcadev.net	Tim does not work on fridays	
Function	Regional sales manager		
Department	Sales		
Note			
Tim does not work on fridays			

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:



🕑 Note	×
Tim does not work on <u>fridays</u>	
	Save

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

Vec No

# 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:

Conversations (F2)	•
Connecting to the server	

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.

Conversations (F2)	0
Connecting to the server	
Retry (19)	

# 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.

0	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:



#### 6.2.3 Call actions

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



Attendant for Teams









Hang up the active call Decline an incoming call

Pick up the 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.

Conversations (F2)	Onversation details (F3)	
& My calls (1)	Jacqueline Portier (+31854853	
Jacqueline Portier <i>(+31854853052)</i>	Please pickup this call using your calling application First name	
✓ ④ Amsterdam Internal [Preview] (0)	Last name	
✓	Business E-mail address	
✓	Business primary phone number	
✓ ● Tunnel2 Bot (0)		

# 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).



Conversations (F2)	0 🧐
& My calls (1)	
<ul> <li>Test Caller Monica (+31850407641)</li> <li>€ 0:07 - Incoming call</li> <li>→ Rejoin call: Service Desk</li> <li>✓ ③ Service Desk (0)</li> </ul>	3

# 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.

🗭 Hang up	
Would you like to end this call?	
	Yes No

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.



Conve	ersations (F2)	06
🗞 My	calls (0)	112
T	Test Caller Peter <i>(+31854853052</i>	<sup>2)</sup> (> 🗢
	Peter Pan • 1:46 - Connected	

### 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:

Conversations (F2)		0 6
& My calls (0)		
Test Caller Peter (+31) • 0:30 - Connected • Destination: Service De	854853052) sk	
<ul> <li>✓ 𝔅 Service Desk (0)</li> </ul>	Destination: Service Desk	
Filtered search results (F6)		≙+ ▼
Q marko		× 6 👯
MarkoVirtual		

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 (F6). When dragging, you will see dotted lines where you can drop the call.

Conversations (F2)	• S
𝗞 My calls (0)	
Test Caller Peter (+31854853052) 2:08 - On hold Destination: Service Desk	
✓ ③ Service Desk (0)	
Filtered search results (F6)	음+ ▼ …
Q marko	× 6 👬
MarkoVirtual India B the Peter (+31054853052)	🖻 🛞 🔇

# 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:

Conversations (	F2)	@   🔮
𝗞 My calls (1)		
Test Cal 0:15-1 Destina	ler Peter <i>(+31854853052)</i> ncoming call ation: <b>Service Desk</b>	0 💿
✓ ④ Service Des	k (0)	

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:

Conversations (F2)	0
‰ My calls (0)	
Test Caller Peter (+31854853052) Connected Destination: Service Desk	•••
V @ Service Desk (0)	

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.

Conversations (F2)	& &
🗞 My calls (0)	
>      O Service Desk (2)	

# 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.



Allendant for Teams	Attend	ant	for	Teams
---------------------	--------	-----	-----	-------

Scontact information	
First name	Peter
Last name	Pan
Business E-mail address	peterpan@pcadev.net
Mobile number	+31612345678
Function	Software Tester
Department	Quality Assurance
Building	Headquarters

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.



Contact information	
First name	Peter
Last name	Pan
Business E-mail address	peterpan@pcadev.net
Mobile number	+31612345678
Function	Software Tester
Department	Quality Assurance
Building	Headquarters

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		Theme	
& &	2 2 2 2	<ul> <li>Default</li> <li>Dark</li> <li>High contrast</li> </ul>	
L C L	2 Co	Date and Time forme	at
		Date format	DD MM YYYY 💌
Tabbed layout		Date delimiter	- *
		Time format	24 Hour 💌
Notification		Teams Desktop Integ	ration
Notification limit	5	Enable Teams de	esktop integration
	-		Test
Notification duration (s)	5		
Notification duration (s) Notification location	5 Center screen 💌		
Notification duration (s) Notification location	5 Center screen 💌	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:



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

nomepage (13)	Conversation details (F3) Contact details (F7)	
Melissa van Dijk (	64101) © Connected	
은 Contact information	8	Cont
First name	Melissa	No notes
Last name	van Dijk	
Business E-mail address	melissa.vandijk@pcadev.net	
Business primary phone number	64101	

#### 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 <u>https://product.attendant.anywhere365.io/attendant-console-desktop-integrator/</u>

#### 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.

E Preferences	×
Interface Conversation	Queues
Calling Identity	
Caller ID for outbound calls	Anywhere365 Attendant Development Queue (+3 🗸
Audio alerting	
My Calls	<none></none>
Monitored queues	<none></none>
✓ Suppress alerts when in a call	
Calling Timeout	
On hold timeout (s)	60

#### 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.

Calling Identity	
Caller ID for outbound calls	Receptionist Anywhere365 [Production] (+31107 👻

#### 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'.

<none></none>	•
<none></none>	•
	<none></none>

#### 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.

Calling Timeout	
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:

💄 Melissa van Dijk (64111)	🕑 🌑 Offline 🗖
😂 Preferences	128
(i Help)	
G Sign out	

Shortcuts 📃 User manual	Application messages	What's new	i License	Support information
Global shortcuts				
F2	Activate conversations pa	anel		
F3	Activate conversation de	tails panel		
F6	Activate contacts panel			
F7	Activate contact details p	banel		
F9	Activate Homepage pane			
F4	Put current conversation	on hold		
Alt + P	Add contact (Alt+P)			
Alt + R	Show most recently used	I (Alt+R)		
Alt + V	Show favorites (Alt+V)			
Alt + L	Turn filter on or off			
Alt + K	Show filter settings			
Shortcuts for conversations panel (F2)				
→	Show conversation detail	Is in F3 / Show queue calls		
<del>~</del>	Hide queue calls			
↑.	Select previous conversa	tion		
t	Select next conversation			
Enter	Pickup conversation / Re	trieve call from hold		
Ctrl + Enter	Transfer			
Delete	Hang up			
Ctrl + Delete	Force hang up call			
Shortcuts for conversation details panel	l (F3)			
Enter	Pickup conversation / Re	trieve call from hold		
Delete	Hangup			
Ctrl + Delete	Force hang up call			
Shortcuts for contacts panel (E6)				
	Show contact details in F	7		
→	Show contact details in F	7 (with one column in E6)		
→	Move to the right in the o	ontact list (with multiple colu	umns in F6)	
÷	Move to the left in the co	ntact list		
1	Move up in the contact lis	st		
↓	Move down in the contact	t list		
Enter	Dial or pickup			
Escape	Cancel search			
Ctrl + Enter	Blind transfer			
Ctrl + E	Send mail to selected cor	ntact		
Shortouts for contact details panel (E7)				
Enter	Dial or pickup			
Ctrl + F	Send mail to selected cor	ntact		

# 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:

Contact details (F7)			12° ×
Tim Field			
은 Contact information		Contact notes	
First name	Tim	Q	<u> </u>
Last name	Field	Note	
Business E-mail address	tim@pcadev.net	Tim does not work on fridays	
Function	Regional sales manager		
Department	Sales		
Note			
Tim does not work on fridays			

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

Contact details (F7)	2° ×
Tim Field	
名 Contact information	
First name	Tim
Last name	Field
Business E-mail address	tim@pcadev.net
Function	Regional sales manager
Department	Sales
Note Tim does not work on fridays	

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:



Contact details (F7)	+ 📖 🕫
Tim Field	
온 Contact information 🏩 🗴	🕞 Contact notes 🔅 🗙
0	
Contact information	Contact notes
oondoormonnation	Controlled
The widgets will automatically snap to the closest line on	the grid. You can give the widgets any size and position.

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

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.



Widget library			×
talendar	լտ Total calls	ાના Chart	Contact information
Contact notes	<b>ງ</b> Conversation History	CRM	<b>()</b> Web page
			Add

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

Settings for widget 'Contact notes'	×
Title (leave empty to use default title 'Contact notes')	
Icon Select	
	ОК
At least you can edit the title and the icon. The title is not mandatory. If you leave the title empty, the default	title

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'



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, nI = 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.

Days	s shown in the week view
$\bigcirc$	Sunday
$\checkmark$	Monday
$\checkmark$	Tuesday
$\checkmark$	Wednesday
$\checkmark$	Thursday
$\checkmark$	Friday
$\bigcirc$	Saturday

#### 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.

ings for widget Co	intact inton	nation	
Title (leave empty to use de	fault title 'Conta	ct information')	
lcon.			
Select			
Contact information optio	ns		

#### 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 (leave empty to use default title 'Micro	osoft Dynamics CRM')	
MyCompany CRM widget		
lcon		
Select		
Dynamics Domain:		
MyCompany	Save	Reset
Dynamics Region:		
crm4.dynamics.com	Edit	Reset
Dynamics Version:		
9.0	Edit	Reset
Widget:		
Invoices		
Headers:		
Number		
Status		
Name		

Title	Optional title, just like every other widget		
lcon	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



Attendant for Teams

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:

A MyCompany CRM widget						
Dimension Sign					Sign out	
Numb	erStatus	Name	Description	Amount	Date	Due date
Active						
181	New	Support		€ 1.932,80	2018/12/24	None specif
181	New	Support		€ 1.932,80	2018/12/24	None specif
181	Booked (re	Support		€ 1.812,00	2018/12/24	None specif

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:

or widget web page
ave empty to use default title 'Web page')
Select
phons
de border
ide scrollbar
://www.your-website.com/get-contact-data?email=[EMAIL]⟨=[LANG]
A URL may contain the following placeholders:

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:
  - o **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.

Help (Broadsoft 1	1.3.3.7)
Shortcuts	User manual

# 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.

Help (Broadsof	1.3.3.7)			×
📟 Shortcuts	📃 User manual	PApplication messages	What's new	
		Download the	user manual here	Close

### 11.4 Application messages

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



Help (Broadsoft 1.3.3.7)	
Shortcuts User manual Application messages What's new	
01-04-2021 09:48:18 Your changes have been saved.	Q
01-04-2021 09:47:39 Your changes have been saved.	C.
01-04-2021 08:15:35 The action could not be completed (AGRWHDEVMWHC0:00023774)	۵
31-03-2021 15:41:15 The note has been saved	Ø
31-03-2021 15:39:19 Mail canceled	ڻ 🔶

# 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.

Help (Broadsoft	1.3.3.7)			
📟 Shortcuts	📒 User manual	Application messages	? What's new	

# 11.6 License

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

Help (latest)	
📟 Shortcuts 🛛 📃	User manual Application messages 😯 What's new 🚺 License
License	Microsoft Teams Receptionist Premium (Month)
Туре	Subscription
Renewal date	25-08-2025 (1607 Days)
For support, visit	https://www2.peterconnects.com/peterconnects-receptionist-support-information-microsoft-teams



# 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.

Additional Desti	Additional Destination configuration			
BCC address 🛛	test1@test.com; test2@test.com			

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.



1ail 🔤 Mail Templates	♥ Connectors ♠ Call Queue ● User Privileges ♬ Audio Files	
Additional Destination	configuration	
BCC address 🛛		
Outgoing mail server	configuration	
	☑ Use custom SMTP server to send mails <sup>●</sup>	
SMTP server 🔮	smtp.office365.com	ļ
Server port 🛛	587	
Default from address 🛛	peterpan@pcadev.net	
	<ul> <li>Use default from address to send email</li> <li>Use user's email address to send email</li> </ul>	
	Authentication required The authentication user must be allowed to send email as the email addresses of the receptionist users, and as the default from address.	
Username	authenticationuser@pcadev.net	
Password	······ •	
Test Configuration		
Send testmail to 🛛	test@test.com	
	2	ave

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.
- 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.

#### 13.2 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.

Give Admin Consent to PeterC	onnects for connecting to Microsoft Dynamics CRM 🤨
Your Azure Id 🤨	MyUserId@MyCompany.com
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:

melissa.vandijk@p	cadev.net	
Permissions Review for y	s requested your organ	l ization
PC Teams Recept Decadev.net	otionist	
This application is	s not published b	y Microsoft.
This app would like	e to:	
Access Common	Data Service as orga	anization users
lf you accept, this app v all users in your organiz review these permissior	vill get access to the s ration. No one else wil 15.	pecified resources for I be prompted to
Accepting these permis your data as specified ir statement. You can char https://myapps.microso	sions means that you n their terms of service nge these permissions ft.com. Show details	allow this app to use e and privacy ; at
Does this app look susp	vicious? Report it here	
	Cancol	Accent

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.

Admin Consent was given successfully Your Azure Id	Give Admin Consent to PeterCo	onnects for connecting to Microsoft Dynamics CRM 🕫
/our Azure Id <sup>2</sup> MyAccount@MyCompany.com	Admin Consent was given suc	ccessfully
	our Azure Id	MyAccount@MyCompany.com

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

# 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.

Mail 🛛	Mail Templates	♥ Connectors	🜲 Call Queue	User Privileges	Audio Files	🍪 Contact Sources	×
Set	tings						
Rejo Ø	bin timeout (s)	0					
							Save

#### 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
- the specified maximum number of calls has been reached
- a specified timeout has been reached


Configuration of overflow destinations for the call queues         Settings for queue         In case no operators are logged in         What happens to the call <ul> <li>No action</li> <li>Disconnect</li> <li>Redirect this call to</li> <li>Phone number</li> </ul> When the maximum number of calls is reached <ul> <li>What happens to the call</li> <li>No action</li> <li>Disconnect</li> <li>Phone number</li> <li>In case no operators are logged in</li> </ul> When the maximum number of calls is reached           What happens to the call <ul> <li>No action</li> <li>Disconnect</li> <li>Redirect this call to</li> <li>Phone number</li> <li>Intervention</li> <li>Intervention</li> <li>Phone number</li> <li>Intervention</li> </ul> What happens to the call <ul> <li>No action</li> <li>Intervention</li> <li>Intervention</li> <li>Intervention</li> <li>Intervention</li> <li>Intervention</li> <li>Intervention</li> </ul>	Service Desk (+31107987724) +112233445566
Settings for queue          In case no operators are logged in         What happens to the call       No action         Disconnect       Redirect this call to         Phone number       Phone number         What happens to the call       No action         What happens to the call       No action         What happens to the call       No action         Disconnect       Redirect this call to         Phone number of calls is reached       Disconnect         Maximum calls in the queue       1         When call times out       1         What happens to the call       No action         Disconnect       1	Service Desk (+31107987724) +112233445566
In case no operators are logged in         What happens to the call       O No action         Disconnect       Redirect this call to         Phone number       Phone number         When the maximum number of calls is reached         What happens to the call       No action         Disconnect       Redirect this call to         Phone number       Disconnect         What happens to the call       No action         Phone number       1         When call times out       No action         What happens to the call       No action	+112233445566
In case no operators are logged in         What happens to the call       O No action         Image: Disconnect       Redirect this call to         Image: Disconnect       Redirect this call to         Image: Disconnect       Phone number         Image: Disconnect       Phone number         Image: Disconnect       No action         Image: Disconnect       Image: Disconnect         Image: Disconnect       Phone number         Image: Disconnect       Phone number         Image: Disconnect       Image: Disconnect         Image: Disconnect       Image: Disconnect         Image: Disconnect       Image: Disconnect	+112233445566
What happens to the call       O No action         Disconnect       Redirect this call to         Phone number       Phone number         When the maximum number of calls is reached         What happens to the call       No action         Disconnect       Redirect this call to         Phone number       Disconnect         Redirect this call to       Phone number         Image: the call is in the queue       Image: the call ima	+112233445566
<ul> <li>Disconnect</li> <li>Redirect this call to</li> <li>Phone number</li> </ul> When the maximum number of calls is reached What happens to the call <ul> <li>No action</li> <li>Disconnect</li> <li>Redirect this call to</li> <li>Phone number</li> </ul> Maximum calls in the queue <ul> <li>1</li> </ul> When call times out <ul> <li>No action</li> <li>Disconnect</li> </ul>	+112233445566
<ul> <li>Redirect this call to</li> <li>Phone number</li> </ul> <ul> <li>When the maximum number of calls is reached</li> </ul> <ul> <li>What happens to the call</li> <li>No action</li> <li>Disconnect</li> <li>Redirect this call to</li> <li>Phone number</li> </ul> <ul> <li>Maximum calls in the queue</li> <li>1</li> </ul> <ul> <li>When call times out</li> <li>No action</li> <li>Disconnect</li> </ul>	+112233445566
Phone number When the maximum number of calls is reached What happens to the call On action Disconnect Redirect this call to Phone number Phone number 1 When call times out What happens to the call On action © No action © Disconnect © No action © Disconnect	+112233445566
When the maximum number of calls is reached         What happens to the call <ul> <li>No action</li> <li>Disconnect</li> <li>Redirect this call to</li> <li>Phone number</li> </ul> Maximum calls in the queue         What happens to the call <ul> <li>No action</li> <li>Disconnect</li> <li>Phone number</li> </ul> When call times out <ul> <li>No action</li> <li>Disconnect</li> </ul>	
When the maximum number of calls is reached         What happens to the call <ul> <li>No action</li> <li>Disconnect</li> <li>Redirect this call to</li> <li>Phone number</li> </ul> Maximum calls in the queue          1          When call times out          No action <ul> <li>No action</li> <li>Disconnect</li> </ul> What happens to the call          No action <ul> <li>Disconnect</li> <li>Disconnect</li> </ul>	
When the maximum number of calls is reached         What happens to the call <ul> <li>No action</li> <li>Disconnect</li> <li>Redirect this call to</li> </ul> Maximum calls in the queue <ul> <li>Phone number</li> <li>1</li> </ul> When call times out <ul> <li>No action</li> <li>Disconnect</li> <li>Disconnect</li> </ul>	
What happens to the call <ul> <li>No action</li> <li>Disconnect</li> <li>Redirect this call to</li> <li>Phone number</li> </ul> Maximum calls in the queue <ul> <li>1</li> </ul> When coll times out             What happens to the call <ul> <li>No action</li> <li>Disconnect</li> </ul>	
Maximum calls in the queue   Maximum calls in the queue  M	
Maximum calls in the queue      Maximum calls in the queue      Maximum calls in the queue      I      When coll times out      What happens to the call         O No action             @ Disconnect	
Maximum calls in the queue I 1 When coll times out What happens to the call O No action Disconnect	
Phone number     Phone number     Maximum calls in the queue     1      When call times out      What happens to the call         O No action	
Maximum calls in the queue	+112233445566
Maximum calls in the queue	
When call times out What happens to the call No action Disconnect	
When call times out What happens to the call O No action Disconnect	
What happens to the call O No action © Disconnect	
Disconnect	
O Redirect this call to	
Call timeout <sup>®</sup> Minutes	
5	Seconds

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 Select an action (default is 'no action'):

- Disconnect
- Redirect this call to...

13.3.2.2 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.

13.3.2.3 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.

# 13.4 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 <a href="https://product.attendant.anywhere365.io/configuration-attendant-console">https://product.attendant.anywhere365.io/configuration-attendant-console</a>

## 13.5 User privileges

On tab page 'User Privileges' you can configure which users have access to the Admin Portal and which users can add/edit/delete Group contacts.

#### 13.5.1 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.



Mail 🛛	Mail Templates	♥ Connectors	🜲 Call Queue	User Privileges	Audio Files
Mar					
Mai	nage users privile	Jes			
Se	arch				Q
(f		(Default for new	users)	-	
		Andrzej Delu:	xe		
		Bram			
		Dorette			
		Joe Biden			
		Kamala Harr	is		
		MarkoVirtua	al	*	
_					
Use	ers privileges				
De	efault settings for new u	isers			
	Enable Admin Portal ad	ccess 🛛			
	Enable Manage Group	Contacts 🛛			

When searching for a specific user, the setting for this user can be set to enable or disable Admin Portal access.

marko		c
	(Default for new users)	
	MarkoVirtual	
		.*
Users privileges		

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

sers privileges	
Settings for user Stephen the K	King
Enable Admin Portal access	0
Enable Manage Group Conta	acts 0

## 13.5.2 User privileges for Group contact access

The privilege to manage Group contacts can be controlled from the User Privileges tab in the Admin Portal.

With the '(Default for new users)', it is possible set the default for new users. When the 'Enable Manage Group Contacts' is checked, all new users get Group contact access, when unchecked, new users do not get Group contact access.



Attor	ndar	ht f	or	Т۵	am	•
Aller	iuai	11.1	UI	Iе	an	К

Mail 🛛	Mail Templates	<b>₩</b> Connectors	🜲 Call Queue	User Privileges	Audio Files
Ma	nage users privile	ges			
Se	arch				٩
ff H		(Default for new	users)		
		Andrzej Delu	xe		
		Bram			
		Dorette			
		Joe Biden			
		Kamala Harr	is		
		MarkoVirtua	al	*	
Use	ers privileges				
De	efault settings for new u	isers			
	Enable Admin Portal ad	ccess 🛛			
	Enable Manage Group	Contacts Ø			

When searching for a specific user, the setting for this user can be set to enable or disable Group contact access.



Mail	Mail Templates	<b>₩</b> Connectors	🜲 Call Queue	User Privileges	Audio Files
Ma	nage users privile	ges			
m	arko				۹
		(Default for new	users)	*	
		MarkoVirtua	al		
				Ŧ	
Use	ers privileges				
Se	ettings for user MarkoV	rtual			
	Enable Admin Portal ad	ccess 🛛			
	Enable Manage Group	Contacts 🤨			

When the checkbox is disabled, the selected user cannot manage (create, edit or delete) Group contacts. The user can, however, still view Group contacts and use them as a filter.

# 13.6 Maintain callback mail template

On tab page 'Mail Template' 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.



Calendar Mail Mail Templates		×
Manage mail templates		
Callback reminder (Dutch)	+	
Callback reminder (English)	$\uparrow \downarrow$	
Callback reminder (French)		
Callback reminder (German)		
Callback reminder (Spanish)		
Mail template		
Select mail template or create new		

# 13.6.1 Adding a new mail template

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

	, connectors	Cococ	• 000 Innegeo	••••••••••	
Manage mail temp	olates				
Callback ren	ninder <mark>(En</mark> glish)	+			
Callback re	minder (Dutch)	$\uparrow$	$\psi$		
Callback rem	ninder (German)				
Callback rer	minder (French)				
Ste	ephen				
Callback rem	ninder (Spanish)				
Mail template					
Mail template					
Mail template Template name	1			Save	
Mail template Template name Subject				Save	
Mail template Template name Subject Message				Save	
Mail template Template name Subject Message				Save	
Mail template Template name Subject Message			)	Save	
Mail template Template name Subject Message				Save	
Mail template Template name Subject Message	 			Save	

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.

# 13.6.2 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.

🗮 Calendar 🛛 🖾 Mail 🔤 Mail Te	nplates			×
Manage mail templates				
Callback reminder (Eng	lish)	+		
Caliback reminder (Du	tch)	<b>↑ ↓</b>		
Callback reminder (Fre	nch)			
Callback reminder (Ger	man)			
Callback reminder (Spa	nish)			
Mail template				
Template name	Callback reminder (Englis	h)	Telete Save	
Subject	Please call back: [C_NAM	E] [C_NUMBER]		
Message	Missed call from: [C_NAN Subject: Kind regards,	ie] [C_NUMBER]		
	[MY_NAME] Email: [MY_EMAIL] Phone: [MY_PHONE]		ĥ	
	Insert •			
				Cancel

#### 13.6.3 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.

nanage mair templates	ŝ			
Callback rem	hinder (English)	+		
Callback ren	ninder (Dutch)	↑ ¥		
Callback rem	iinder (German)			
Callback rem	ninder (French)			
Ste	phen			
Callback rem	inder (Spanish)			
Mail template	Collbook reminde	(English)	Teleta Sour	
Mail template Template name	Callback reminder	(English)	Toelete Save	
Mail template Template name Subject Message	Callback reminder Please call back: J Missed call from: Subject:	(English) C_NAME] [C_NUMBER] C_NAME] [C_NUMBER]	Delete Siive	
Mail template Template name Subject Message	Callback reminde Please call back: [ Missed call from: Subject: Kind regards, [MY_NAME] Email: [MY_EMAIL Phone: [MY_PHO]	(English) C_NAME] (C_NUMBER) C_NAME] (C_NUMBER)	Delete Sove	

# 13.7 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.



Mail Mail	Mail Templates	<b>₩</b> Connectors	🜲 Call Queue	ř.	User Privileges	🞜 Audio Files	
Avo	iilable audio files						
	MusicOnHold-Any	whereDefault.wav	*	+			
	MusicOnHo	ld-Custom01		$\uparrow$	$\mathbf{\Phi}$		
	MusicOnHo	ld-Custom02					
	Armin Va	an Buuren					
			•				

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.

## 13.7.1 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.

Upload new audio file							
File needs to be in '.wav' format, single-channel, 16-bit samples with a 16,000 (16KHz) sampling rate.							
Select file Play Stop 1 Upload							
Audio file name: Welcome jingle.wav							

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

#### 13.7.2 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



Welcome jingle.wav
ename 🛓 Download 🕨 Play 🔳 Stop 👕 Delete
ename 🛃 Download 🕨 Play 🛛

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.

# 13.7.3 Select music on hold for a queue.

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

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

	+ connectore		- coor i finilogeo	
Configuration of ove	erflow destination	ons for the call qu	eues	
Settings for queue	Select queue			~

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

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

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



ali 🖸 Mali Terri	plates Connectors	Lan Queue	User Phylieges	JJ Audio Files	
What happens	No action				
to the call	O Disconnect				
	Redirect this call to				
	O Real of the out ton				
Maximum calls					
in the queue 🥗					
When call time	es out				
What happens	No action				
to the call					
	O Redirect this call to				
Call timeout 🛛	Minutes	Se	econds		
Music on hold					
Audio file played in the queue 3	Welcome jingle2.wav				~
	(Default music on hold)				
	MusicOnHold-AnywhereD	efault.wav			
	MusicOnHold-Custom01				
	MusicOnHold-Custom02				
	Armin Van Buuren				
	Welcome jingle2.wav				

# 13.8 Contact sources

In the Admin Portal, under the tab 'Contact Sources' additional contact sources can be managed. Contacts in these sources will be merged with the other contacts.

Mail	Mail Templates	₩ Connectors	🜲 Call Queue	🛡 User P	rivileges	5 <b>5</b> A	udio Files	わ Contact Sources	
Mar	nage Contact Sou	rces							
	Ē	Excel contacts			+				
		Star Wars			1	¥			
		New source							

A list of contact sources is presented. This list is also shown to the users of the attendant in the filter menu. The order in which it is presented in both places can be changed by clicking on an item in the list and using the arrow up and down buttons to the right to move it up or down the list, respectively.



#### 13.8.1 Admin consent

In order to work with contact sources, 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.

Mail	Mail Templates	₩ Connectors	🜲 Call Queue	User Privileges	🞜 Audio Files	わ Contact Sources	
This	feature requires conser	nt for reading files	accessible to the u	Iser. <sup>1</sup> Give consent			
Mar	naae Contact Sour	rces					
					+		
					$\uparrow \downarrow$		

After giving consent, it might take a few minutes before it has been processed. Please refresh the page until the message disappears: only then will the feature work.

## 13.8.2 Adding or changing a contact source

By clicking the plus icon next to the list of available audio files 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 attendant contact 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.

Edit				
Name			<u>ا</u>	
Url				
Icon	***	Select icon		
	Validate			
				Cancel

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:

+ New $\sim$	$\overline{\uparrow}$ Upload $\vee$	🗄 Edit in grid view	ಢ Sync 🛛 🗟 Add sho
Documents	5		
	Name $\vee$		Modified $\vee$
X	contacts.xlsx	<u>È</u> :	Monday at 1:32 AM



There you can copy the link and change access. By default, the Edit rights seem to be granted. You can disable that by clicking on the "Anyone with the link can edit". Only view access is required for the contact source functionality to work. After the access rights have been set, click *Copy* to generate and copy the URL.

Send link contacts.xlsx	×
Anyone with the link can edit >	
To: Name, group or email	$O \sim$
Message	
	Send
Copy link	
$\bigoplus$ Anyone with the link can edit >	Сору
Shared with:	

After filling in both the Name and the URL and optionally selecting a different icon, you have to validate the contact source. This will check whether the application can access the file and actually read it. After validation a message will appear to show the user whether the file is correct or not. The detailed messages are shown below that.

If the validation is successful, the save button will be enabled. Press it to save the changes in the database.

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.

#### 13.8.3 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 or change to the selected contact source. Then click the Delete button next to the Save button and confirm that you are sure you want to delete this contact source.

#### 13.8.4 Supported file formats

Currently the following files are supported: Excel files (.xlsx, .xls), comma 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.

The following columns are supported:

Column	Description
ld	(Required) A unique ID for this contact in this file.
FirstName	
MiddleName	
LastName	(Required)
CompleteName	
DisplayName	
UserId	
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	

# 14 Change history

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
	<ul> <li>Added overflow configuration when no operator is logged in to §13.4</li> </ul>
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

Attendant for Teams



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