

# CALNET: AT&T Voice DNA<sup>®</sup> Receptionist: End user participant guide

Version 1.0



## Covered topics

- What is AT&T Voice DNA<sup>®</sup> Receptionist
- Feature summary
- Logging into the Receptionist Console
- Receptionist Console
  - Search
  - Monitored users
  - Directory
  - Company
  - Speed dial
  - Call console
- Additional support
- Questions and answers



# What is AT&T Voice DNA Receptionist

AT&T Voice DNA Receptionist is a software-based attendant console for use by front office receptionists to monitor and manage inbound calls for up to 200 selected users in their organization.

AT&T Voice DNA<sup>®</sup> Receptionist

Settings Help Full screen Sign out  
Pete Taylor

**Call console**

Enter number

No items to show

▼ Conference call   
No items to show

**Contacts**

Search  Monitored users x Company x Speed dial x TBO x

Begins with All  Quick search

Status	Last name	First name	Number	Extension	Mobile	Department	Notes
●	Customer	Calnet	+14702253000	53000			<a href="#">Notes</a>
●	Customer	Calnet	+14702253001	53001			<a href="#">Notes</a>
●	Customer	Calnet	+14702253002	53002			<a href="#">Notes</a>
●	Customer	Calnet	+14702253003	53003			<a href="#">Notes</a>
●	Customer	Calnet	+14702253004	53004			<a href="#">Notes</a>



## Feature summary

After launching Receptionist and signing in, the user can use the Receptionist workspace to:

- Monitor the line status of selected users.
- Manage own calls – answer, hold, resume, end calls.
- Drag and drop call transfers.
- Place calls directly, or from contacts, call history, and speed dial codes.
- Search the company Directory easily.
- Create and manage conference calls for three or more contacts.



## Logging into the AT&T Voice DNA Receptionist portal

A user with permission to use the Receptionist application can start Receptionist from the AT&T Voice DNA User Dashboard or directly at <https://recvdna.att.com/receptionist/>.



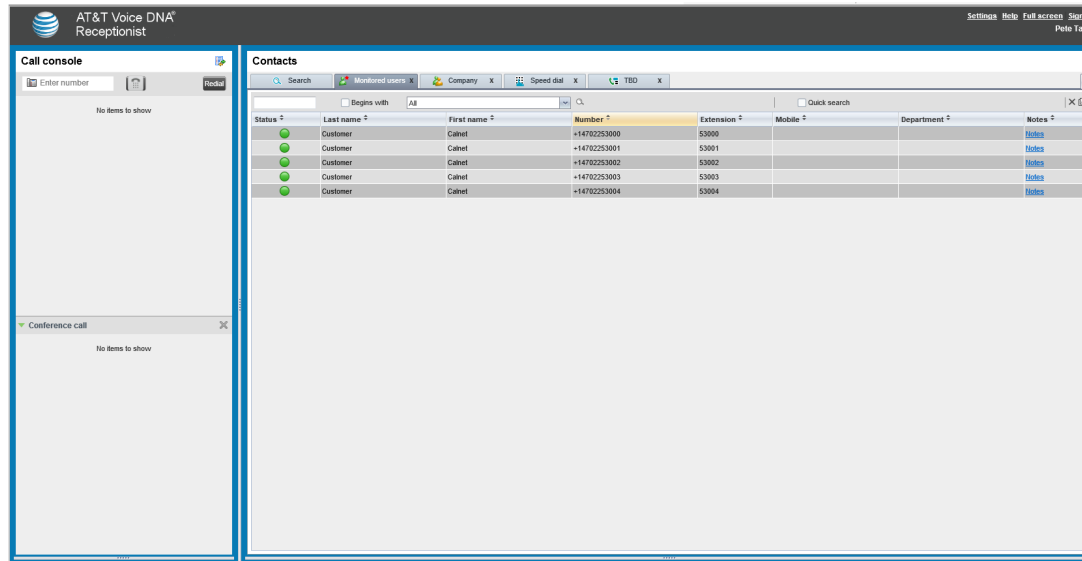
The screenshot shows a login form with the following elements:

- A text input field labeled "User ID" containing the value "5555551212".
- A text input field labeled "Password" containing ten black dots, with a small eye icon to its right for toggling visibility.
- A checkbox labeled "Stay signed in" which is currently unchecked.
- A dark grey button labeled "Sign In".
- A blue hyperlink labeled "Bookmark this page" located below the "Sign In" button.

Enter the User ID and Password and select the **Sign In** button.



# Receptionist console



## Logo area at top of page

- Links to Settings to configure the Receptionist portal.
- Links to Help and other Receptionist functions.
- Displays error, warning, and informational messages.

## Call console pane

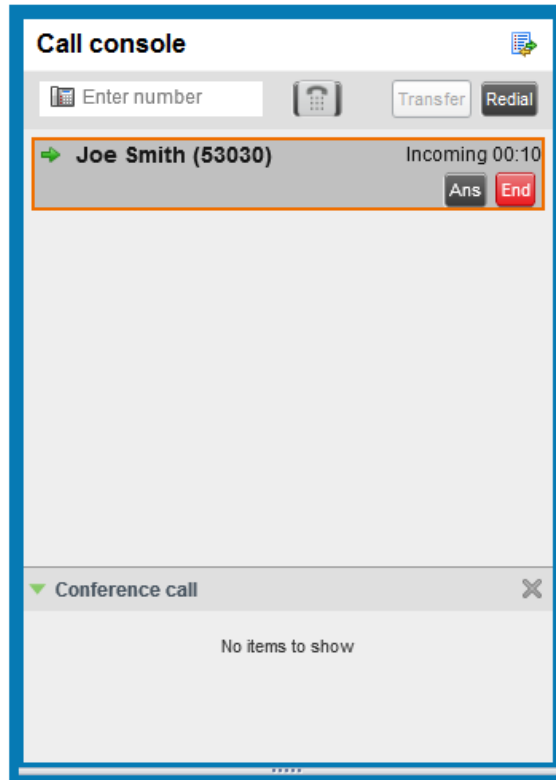
- Manages your own current calls.
- Includes the Dialer and Redial button.
- Link to Call History dialog box to view and dial your past calls.
- Conference calls are shown in the Conference call area.

## Contacts pane

- Contains your contact directories, search function, and speed dial codes.



# Call console



- Use the Call console, on the left of the Receptionist workspace, to view and manage your current calls.
- You can manage calls for yourself and contacts, monitor calls, start and manage conference calls, and use call history.



# Call console continued

## Dialer

- The Dialer, at the top of the Call console, contains an **Enter Number** field and a Dial icon.
- Use the Dialer to call a number by entering the number in the field instead of using a contact's entry in the Contacts pane. You can enter a full phone number or just the location prefix and extension (for example, 6-1234).

## Current Calls

- Current calls appear in the center of the Call console.
- For each call, you can view the calling party's name and phone number (if available), the call state, and the duration of the call. You can also see how long a call has been on hold. If you are a hunt group member, you can view calls coming into the hunt group.

## Conference Calls

- The Conference call area, below the current calls area, shows conference calls in progress. After you start a conference call in the current calls area, the call moves to the Conference call area.

## Call Notification

- When you have an incoming call, a pop-up message appears above the system tray in your screen's task bar (if this feature is enabled on your Settings Plug-Ins page). From this pop-up, you can answer or transfer the incoming call or send it to voicemail.

## Call History

- The Call history window shows missed, received, and placed calls. You can place a call from a call log number here.





# Making calls

## Call a contact

- In the Contacts pane, do one of the following:
- Click **Monitored Users** or **Company**, and then locate your contact.
- Click **Search** and search for your contact in both directories.
- Click the contact's name to expand the entry.
- Click **Call**.

## Directly dial a number

- On the Call console, enter the number or extension in the **Dialer**.
- Click the **Dial** icon.

## Call from call history

- At the top-right of the Call console, click the **Call History** icon . The Call history dialog box appears, with a log of past calls.
- From the Show list, select **Missed Calls**, **Received Calls**, or **Dialed Calls**. (By default, **Missed Calls** is selected.)
- To find the number you want to call, scroll through the list that appears.
- Click the entry to expand it, and then click **Call**.
- To close the Call History dialog box, click **OK**.



# Managing current calls

In the current calls area of the Call console, you can answer calls, put calls on and off hold, transfer calls, and more. You can call a contact from the Call console or the Contacts pane.

## View Current Calls

- Your current calls are always visible in the **Call console**.
- You can view conference call details. In the Conference call area, click the **Expand** icon .
- If the Call Notification feature is enabled, a notification window above your task bar's system tray shows the caller's name and number.
- The call state of each call shown is indicated by an icon:



Incoming call



Active call



Held call



Outgoing call



# Managing current calls continued

## Answer a call

- In the Call console, move your mouse over an incoming call, and then click **Ans.**
- In a Call Notification window, click anywhere in the text.

## Place a call on hold

- In the Call console, move your mouse over an incoming or active call, and then click **Hold**.  
Note: The Hold function is not available from a virtual office.

## Resume a call

- In the Call console, move your mouse over the held call, and then click **Ans**.  
Note: The Resume function is not available from a virtual office.

## End a call

- In the Call console, move your mouse over a call, and then click **End**.



# Transferring calls

The Call console offers four types of call transfers. Transfers vary according to the role you play in the call.

## Blind transfer

- You transfer a call to another party silently. After you transfer, the call disappears from the Call console, but you can still monitor it in the Contacts pane.

## Supervised transfer

- You transfer a call to a monitored user. As you monitor the call on the Monitored Users tab, if you see that the call is not answered, you can reconnect to it.

## Transfer with consultation

- You transfer a call, and when the transferred call is answered, you introduce it to the person who answers.

## Transfer to Voicemail

- You transfer a call to a contact's voicemail or your own voicemail box.



## Blind transfer

You can blind transfer active, held, or ringing calls. If a call is ringing, blind transfer redirects the call before you answer it. You can blind transfer a call to a number you enter in the Dialer or to a contact.

Blind transfer a call to a destination number:

- In the Call console, select a call to transfer.
- In the **Dialer**, enter the destination number, and then click **Transfer**. The call is transferred and disappears from the Call console.

Blind transfer a call to a contact:

- In the Call console, select a call to transfer.
- In the Contacts pane, locate the destination contact by doing one of the following:
  - Click **Monitored Users** or **Company**, and then locate the contact.
  - Click **Search** and search for the contact from both directories.
- Click the destination contact's name to expand the entry.
- Click **TXR** or drag the call from the Call console and drop it onto the contact in the Contacts pane. The call is transferred and disappears from the Call console.



# Supervised transfer

You can transfer and supervise an active inbound call to a monitored user.

- In the Call console, select a call to transfer.
- In the Dialer, dial the number or contact to whom you want to transfer the call.
- On the Monitored Users tab, if you see that the call is not answered or the line is busy, you can reconnect to the call.
- If you want, you can transfer the call to another number. Move the mouse over the new, non-selected call and click **Transfer**.



## Transfer with consultation

You might want to speak to the person you are transferring the call to before you transfer the call. You can transfer active, held, or ringing calls. If you transfer a ringing call, it is redirected before you answer it.

- In the Dialer, call the destination number or contact.
- Speak when the party you are transferring the call to answers.
- In the Call console, select the call to transfer (an active call will be put on hold automatically).
- Move your mouse over the new call, and then click **TXR**. The calls are connected and disappear from the Call console.



# Transfer to voicemail

You can transfer a call to a contact's voicemail or to your own voicemail. You can transfer a call that is active, held, or ringing on your phone. The contact must have a voicemail box.

## Transfer a call to voicemail

- In the Call console, select a call to transfer.
- In the Contacts pane, locate the contact where you will transfer the call by doing one of the following:
  - Click the Monitored Users or Company tab, and then locate the contact.
  - Click Search and search for the contact from both directories.
- Click the destination contact to expand the entry.
- Click **VM**. The call is transferred to the contact's (or your) voicemail and disappears from the Call console.





# Managing conference calls

You can start and manage a 3-way conference call. If your Administrator activates the N-way conference calls feature for you, you can have a conference call with up to 15 participants. Start a 3-way call, and then add the additional participants. To start a conference call and add participants, use the current calls area of the Call console. To manage or end an active conference, use the Conference call panel. You can have only one active conference at a time.

## Start a conference call

- To start a conference call, you need two active calls in the current calls area of the Call console. You are the third participant.
- To establish the call with the first contact, call the contact (by any method). The call appears in the current calls area.
- To add the second party to the call, click the first call and then move your mouse over the second call. Click **Conf**.

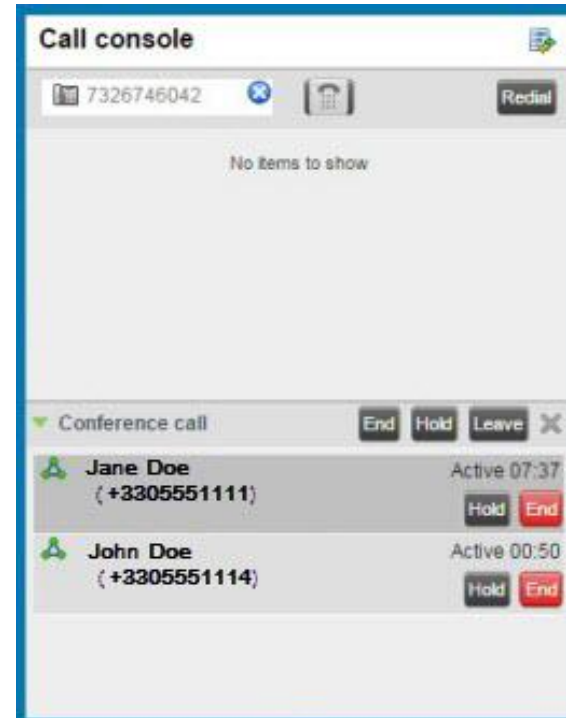
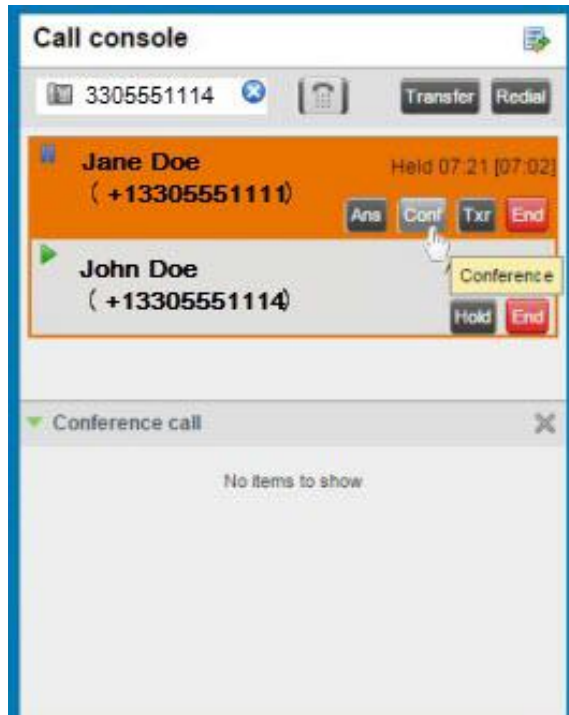
## Add participants to a conference call

- Call the new participant (by any method). The call appears in the current calls area of the Call console.
- Move your mouse over the call you want to add, and then click **Conf**. The call is added to the active conference and moves to the Conference call panel.

Note: Before you can add more participants, your Administrator must assign the N-way feature to you.



## Managing conference calls continued



- The calls move to the Conference call area, and the 3-way conference call is established. You can add additional participants.



# Managing conference calls continued

## Hold a conference call

- In the Conference call bar click **Hold**. The entire conference call is put on hold.

## Resume a conference call

- In the Conference call header, click **Ans**. All calls in the conference become active.

## Hold or resume a specific participant's call

- Expand the Conference call area by clicking the Expand icon .
- Move your mouse over the participant's call. To hold the participant's call, click **Hold**. To resume the participant's call on hold, click **Ans**.

## Leave a conference call

- In the Conference call area bar, click **Leave**. The other parties remain connected, but the calls disappear from the Call console.

Note: This function is only available for Three-Way Conferences.

## End a conference call

- In the Conference call panel bar, click **End**. All calls are disconnected, and the calls disappear from the Call console.



## Answering an incoming call for a monitored user

From the Receptionist workspace, you can interrupt (barge in) on a call to establish a 3-way conference, and you can answer a call for a monitored contact. With Directed Call Pickup, you can answer a call coming in to a monitored user.

- In the Contacts pane, locate the monitored user with the incoming call by doing one of the following:
  - Click **Monitored Users**, and then locate the monitored user.
  - Click **Search** and search for the monitored user.
  - Click the monitored user's entry to expand it.
  - Move your mouse over the monitored user and click **Ans**. The call appears in the Call console as Incoming.



## Call Barge-in



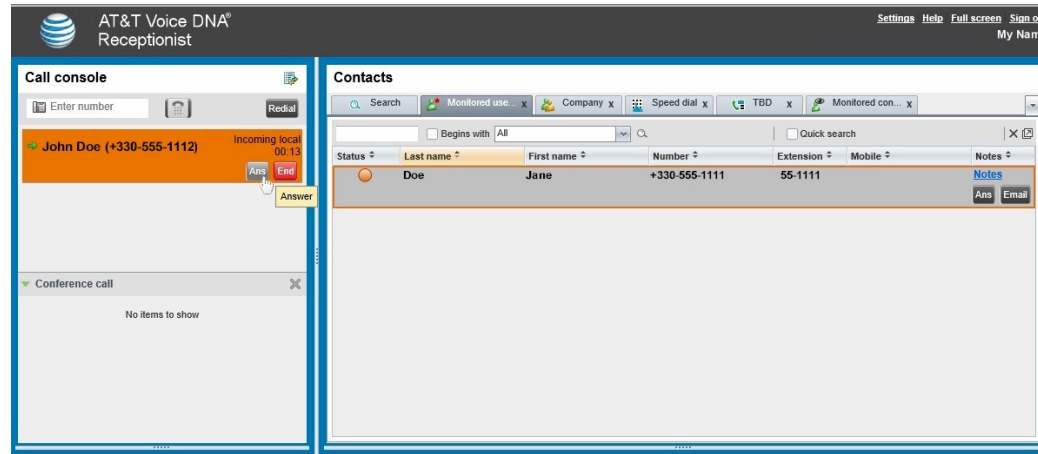
If provisioned by your administrator, you can barge in on an established call to set up a 3-way conference. In the Contacts pane, locate a contact on the active call by doing one of the following:

- Click **Monitored Users**, and then locate the contact.
- Click **Search** and search for the contact from both directories.
- Click the busy contact, and then click **Barge**, establishing a 3-way conference. The calls appear in the Conference call area of the Call console. You can treat the call like any conference call, except you can not add additional participants.

Note: A barge-in conference can have only three participants at any one time.



# Using the Contacts pane



Use the Contacts pane, on the right side of the Receptionist workspace, to call, monitor, and manage your contacts. The Contacts pane has four active information tabs.

- Monitored users: A searchable list of all the users you actively monitor.
- Company: A searchable directory of all the users and hunt groups in your organization. This is the same as the Directory on your AT&T Voice DNA User Dashboard.
- Search: A feature for searching both tabs at once.
- Speed dial: A configurable list of speed dial codes.

Note: The inactive Pullout icon, in the Contacts pane search area, is reserved for future use.



# Managing calls in the Contacts pane

In the Contacts pane, you can answer calls, put calls on and off hold, transfer calls, and more. You can also call a contact from the Contacts pane.

## View status of contacts

- The call state of each call show is indicated by an icon.



Available



Ringing



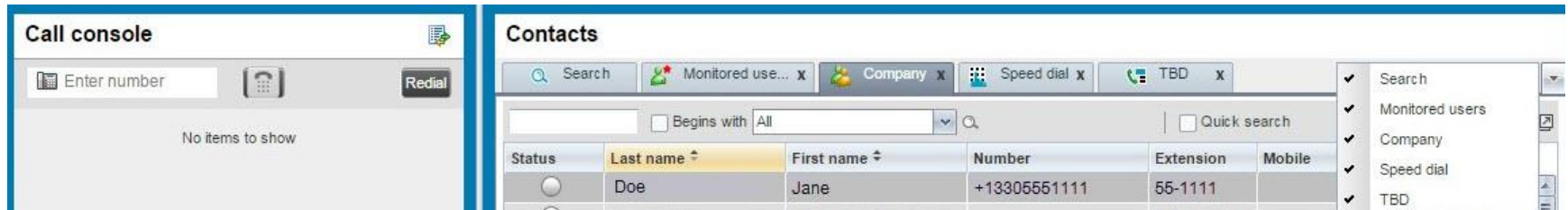
On a call



Call forwarding always



## Viewing your directories



You use the Monitored users tab to monitor the phone status of selected users assigned by your Administrator. Your Administrator controls which users you monitor. To view all contacts, use the Company tab.

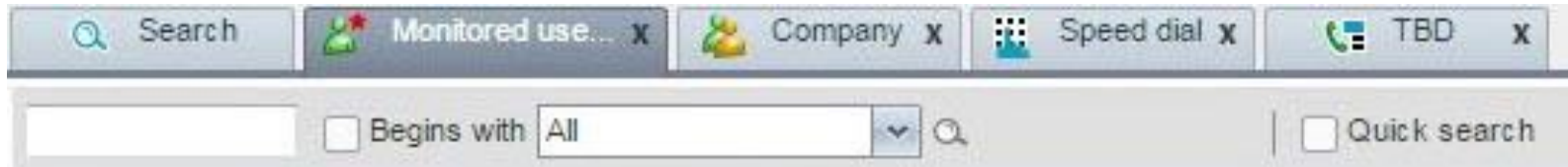
The Monitored users and Company lists contain this information for each contact or user:

- Call status (Monitored users tab only)
- First and last name
- AT&T Voice DNA phone number
- Extension
- Mobile number, if available
- Optional notes (Monitored users tab only)
- You can customize the Contacts pane.
- You can sort entries by column. To sort by a column, click the column heading. To reverse the order, click the column heading again.
- You can show or hide tabs. To select which tabs to show, click the down arrow in the upper-right of the window.





## Monitored users / Company tab



### View monitored user details and use available functions

- Click a monitored user or contact to expand the entry.
- To call the monitored user or contact's AT&T Voice DNA number, click **Call**.
- To call the monitored user or contact's extension, click **Ext**.
- To call the monitored user or contact's mobile number (if listed), click **Mob**.
- To send the monitored user or contact an email, click **Email**.

### Search for a Specific User

- The search function for each tab is directly beneath the tab name. You can search for a first name, last name, or number.



# Directory tab

## Search all columns of a directory tab

- Make sure the **Quick search** checkbox (on the right) is unchecked.
- Click in the first search field.
- Enter a name, number, or at least two characters of the name or number.
- If you want, check the **Begins with** checkbox. The search returns only results that begin with the character string you entered. If you do not check **Begins with**, the search returns results that begin with the string and also results that contain the string anywhere.
- Leave the **Begins with** selection as **All**.
- Click the **Search** icon (the magnifying glass ). All the entries on the tab that meet the search criteria are displayed.
- From the search results, click the entry you want.

## Search in a specific column on a directory tab

- On the Monitored users or Company tab, make sure the **Quick search** checkbox (at the right) is unchecked.
- Click in the first search field.
- Enter a name, number, or at least two characters of the name or number.
- If you want, check the **Begins with** checkbox. The search returns only results that begin with the character string you entered. If you do not check **Begins with**, the search returns results that begin with the string and also results that contain the string anywhere.
- From the **Begins with** drop-down list, select a column.
- Click the **Search** icon. All the contacts in the selected column that meet the search criteria are displayed.
- Select the contact you want.



# Directory tab continued

## Search all Directories

- You can use the Search tab to search for a contact in all directories at once.
  - In the Contacts pane, click the Search tab.
  - Click in the first search field.
  - Enter a name, number, or at least two characters of the name or number.
  - If you want, check the ***Begins with*** checkbox. The search returns only results that begin with the character string you entered. If you do not check ***Begins with***, the search returns results that begin with the string and also results that contain the string anywhere.

## Use the Contacts Pane

- Click the Search icon. The text you enter is matched against all columns in both the Monitored users and Company directory tabs (except for the Notes column). Search results are displayed on the Search tab.
- From the results, select the user or contact you want.



# Calling or emailing a user or contact

## To call a contact

- On the Monitored users or Company tab, search for or scroll to find the user or contact.
- Click the entry to expand it.
- Click **Call**.

## Email a contact

- On the Monitored users or Company tab, search for or scroll to the user or contact.
- Click the entry to expand it.
- Click **Email**. A blank email addressed to the user or contact appears.
- Write the email and send.

## Add a Note to a Monitored User

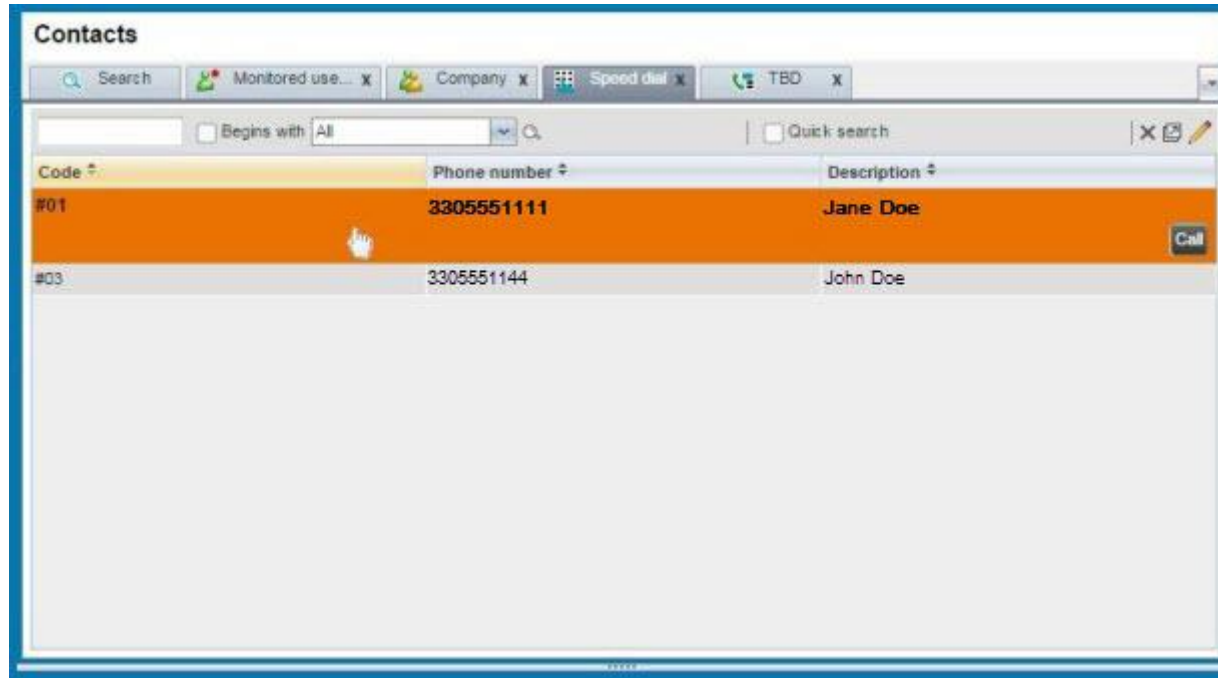
- You can provide additional information about a user in the Notes column.

## Make a note about a monitored user

- On the Monitored users tab, search for or scroll to the user or contact.
- Click the entry to expand it.
- In the Notes column, click the Notes link for that user. The Notes dialog box appears.
- Enter your note text. You can also view and edit previously entered notes.
- To save your changes and close the dialog box, click **OK**. To close the dialog box without saving, click **Cancel**.



## Managing speed dial codes



- Using the Speed dial tab in the Contacts pane, you can create and edit speed codes for your frequently called contacts. The speed code, phone number, and description are shown for each contact.



# Managing speed dial codes continued

## Add a speed dial entry

- In the Contacts pane, click the Speed dial tab.
- Click the Edit icon. The Edit Speed Dials dialog box appears.
- Click **Add**. A new line is added below the existing entries, enabling you to define a new entry.
- From the Code drop-down list on the left, select a speed dial code.
- In the **Phone number** field, enter the phone number for this code.
- In the **Description field**, enter a description that identifies the entry.
- To save the entry, click anywhere in the dialog box outside the entry.

## Call a speed dial entry

- Click the speed dial entry to expand it.
- Click **Call**.

## Modify a speed dial entry

- In the Contacts pane, click the Speed dial tab.
- Click the Edit icon. The Edit Speed Dials dialog box appears.
- Double-click the entry.
- Edit the information.
- To save your changes, click anywhere in the dialog box outside the entry.

## Delete a speed dial code

- In the Contacts pane, click the Speed dial tab.
- Click the Edit icon. The Edit Speed Dials dialog box appears.
- Select the entry, and then click **Delete**.



# Settings and other links

The screenshot shows the 'General' settings tab in the Receptionist application. The interface has a blue header with tabs for 'General', 'Application', 'Services', 'Plug-ins', and 'About'. The 'General' tab is active. Below the header, the 'General' section contains several settings:

- Date format:** Radio buttons for 'MM/DD/YYYY' (selected) and 'DD/MM/YYYY'.
- Time format:** Radio buttons for 'AM/PM' (selected) and '24 hour'.
- Workspace:** Three buttons: 'Save workspace', 'Load workspace', and 'Restore workspace'. Below these is a checkbox for 'Always save workspace on signout'.
- Drag and drop:** A checkbox for 'Transfer the call automatically when it's dropped on a contact'.

At the bottom of the settings area, there is a footer that reads 'Manage your general preferences' on the left and '4 categories' on the right.

You can customize the functionality and appearance of Receptionist.

- To get started, click **Settings** in the upper-right of the Receptionist workspace, and then click the tab (General, Services, Plug-ins, About) that contains the settings you want to customize. The Applications tab is reserved for future use.
- When you are finished, click **Back to application** in the upper right corner of any tab.

## General Tab

- Use the General tab to configure miscellaneous settings that improve the usability of Receptionist.



## General tab

Use the General tab to configure miscellaneous settings that improve the usability of Receptionist.

- Select a date format for call entries.
- Select a time format.
- If you have customized the size and position of the Web browser that displays your Receptionist workspace, you can do one of the following:
  - To save your workspace configuration, click **Save workspace**.
  - To rearrange your active workspace to a previously saved configuration, click **Load workspace**.
- To restore the original workspace configuration, click **Restore workspace**.
- If you want, check the ***Always save workspace on sign out*** checkbox. This means you will not have to open this page and save your workspace configuration every time you end a Receptionist session.
- Check the ***Drag and drop*** checkbox so that you can easily transfer a call to a contact by dragging it from the Call console and dropping it on the contact's entry in the Contacts pane. You can drag and drop a call that is ringing, answered, or held.





# Services tab

General Application Services Plug-ins About

**General**

Date format  MM/DD/YYYY  DD/MM/YYYY

Time format  AM/PM  24 hour

Workspace     
 Always save workspace on signout

Drag and drop  Transfer the call automatically when it's dropped on a contact

Manage your general preferences 4 categories

Use the Services tab to turn on the Call Forwarding Always feature. When you activate the Call Forwarding Always feature, your own name and number appear as the caller ID on the recipient's phone, even though the call is forwarded to another number.

- On the Services tab, under Inactive, click **Call forwarding always**.
- In the settings that appear, check the **Active** checkbox.
- If you want a caller to hear a tone that indicates the call is being forwarded, check the **Ring Splash** checkbox.
- In the **Forward to** field, enter the destination phone number.
- Click **Save**.



## Additional support

- Voice DNA support helpdesk
  - 877.288.8362, option 2
- AT&T CALNET Training
  - <http://www.attcalnettraining.com>
  - [CalnetTraining@att.com](mailto:CalnetTraining@att.com)
- Please complete our survey.



# Questions and answers



