

OfficeSuite® PC Console

QUICK REFERENCE GUIDE



Welcome Letter:

You will receive a Welcome Letter which will provide instructions on the following:

- Where to obtain the PC Console Software download
- License Key
- Settings Information

Configuring the Settings:


SIP Settings

- A Username**
Enter in your OfficeSuite® extension
- B Password**
Enter in your OfficeSuite® PIN
- C Domain**
Refer to the Welcome Letter
- D Proxy**
Leave blank
- E Port**
Please ensure 5060 is populated

SIP Settings

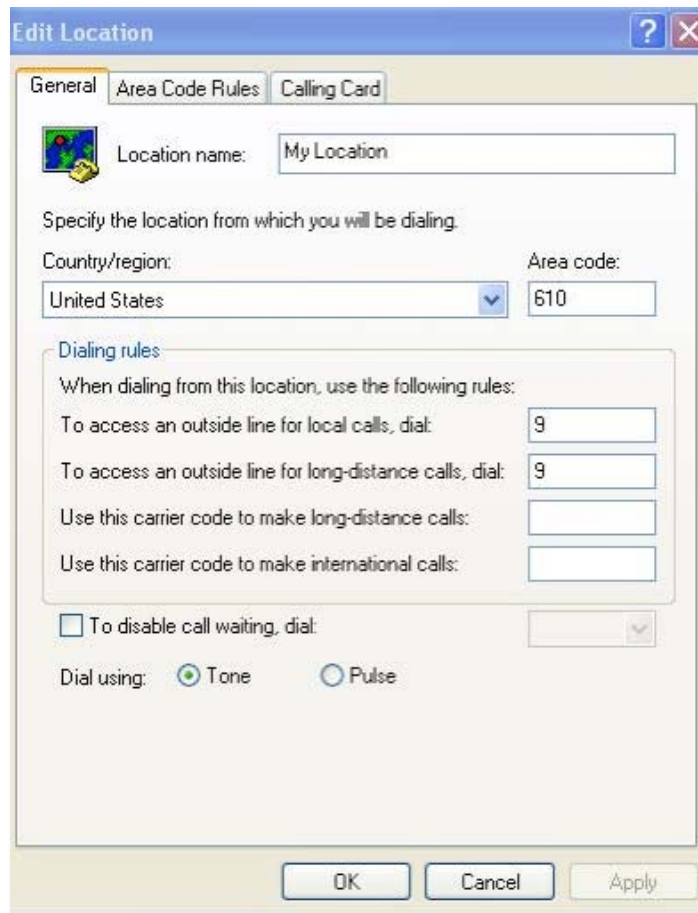
Network settings

Changes to the network settings will not take effect until IP Console has restarted.

<u>U</u> sername	<input type="text"/>	A
<u>P</u> assword	<input type="text"/>	B
<u>D</u> omain	<input type="text"/>	C
<u>P</u> roxy	<input type="text"/>	D
<u>P</u> ort	<input type="text" value="5060"/>	E 


Setting up dialing rules

- Click **Start – Control Panel**
- Select **Phone & Modem Options**
- **On the General tab:** If you don't currently have any phone settings then select **New**; if you already have settings then select **Edit**



The 'Edit Location' dialog box is shown with the 'General' tab selected. The 'Location name' is 'My Location'. The 'Country/region' is 'United States' and the 'Area code' is '610'. Under 'Dialing rules', the following fields are filled: 'To access an outside line for local calls, dial:' is '9', 'To access an outside line for long-distance calls, dial:' is '9', 'Use this carrier code to make long-distance calls:' is empty, and 'Use this carrier code to make international calls:' is empty. The 'To disable call waiting, dial:' checkbox is unchecked. The 'Dial using:' radio buttons are set to 'Tone'.

- Ensure the Area code is correct
- Select "9" to dial both local & long distance calls
- Select **OK**
- **On the Area Code tab:** Select **New** or **Edit**

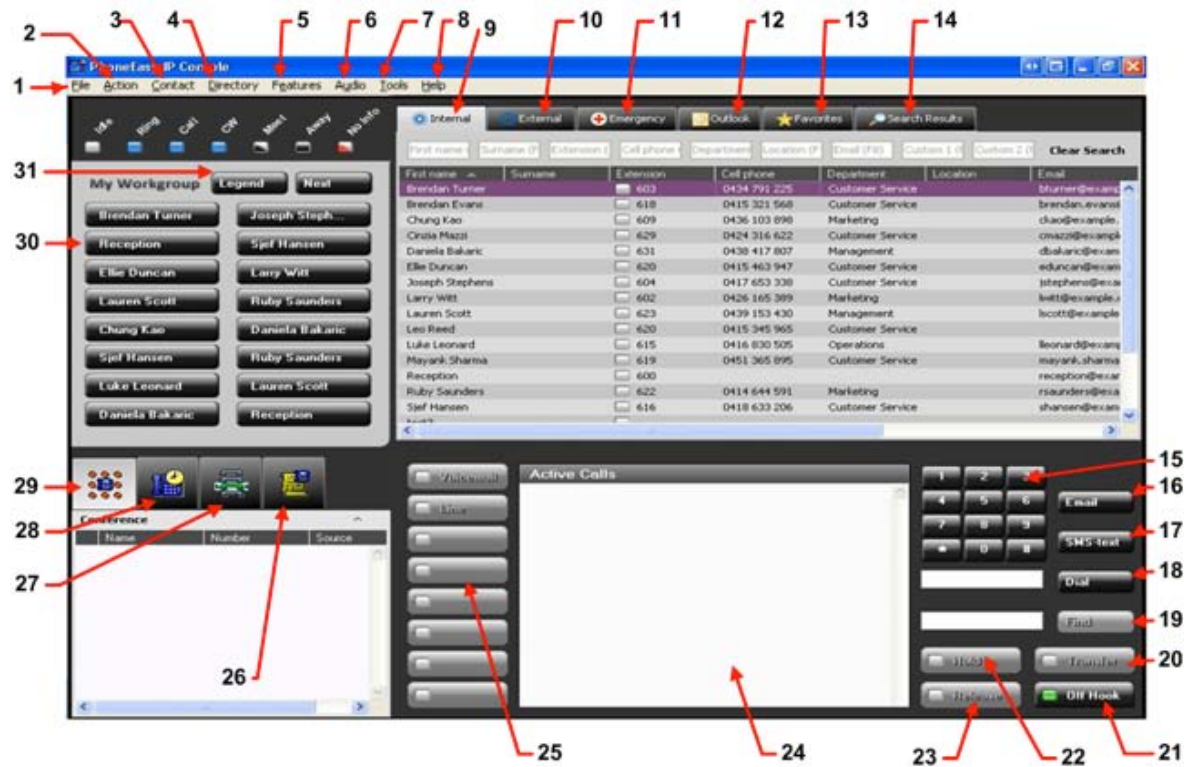


The 'Edit Location' dialog box is shown with the 'Area Code Rules' tab selected. The text reads: 'An area code rule determines how phone numbers are dialed from your current area code to other area codes and within your area code.' Below this is a table with the following data:

Area Code	Prefixes	Rule
610	All	Dial 1

Buttons for 'New...', 'Edit..', and 'Delete' are visible below the table. A 'Description' section at the bottom contains the text: 'Select a rule in the list above to view its description, or click New to add a rule.' The 'OK', 'Cancel', and 'Apply' buttons are at the bottom of the dialog.

- Create the Rule to Dial 1 and select **OK**



1	FILE: Set Password, Export/Import Contacts, Export/Import Logs, Exit	11	EMERGENCY: View & Search Emergency directory	21	OFF HOOK/ANSWER: Like the operation key
2	ACTION: Off Hook/Answer, Release, Transfer, Hold	12	OUTLOOK: View & Search Outlook Contacts	22	HOLD: Placing call on hold
3	CONTACT: New, Edit, Delete, Email & SMS using a directory entry	13	FAVORITES: View & Search user managed personal directory	23	RELEASE: Releasing a call
4	DIRECTORY: Refresh Outlook	14	SEARCH RESULTS: Viewing searched results	24	ACTIVE CALL AREA: Display all calls at console
5	FEATURES: Show Scheduler, Show Activity Log	15	DIAL PAD: Keying in dialing keys 0-9*#	25	FLEXKEYS: Eight Flexible call function keys (eg – FWD, Speed dial)
6	AUDIO: Volume, Mute	16	EMAIL: Sending Email	26	CALL LOGS: Incoming, Outgoing, Missed, and SMS messages
7	TOOLS: Options (SIP Settings etc)	17	SMS: Sending SMS (not available)	27	CALL STACK: Destination for accumulating contact entries for making outbound calls
8	HELP: Users Guide, About	18	DIAL: Dialing the dial string	28	SCHEDULER: Destination for scheduling calls
9	INTERNAL: View & Search Internal directory	19	FIND: Searching across all directories	29	CONFERENCE: Display for conferees
10	EXTERNAL: View & Search External directory	20	TRANSFER: Transferring a call	30	MY WORKGROUP: Monitored Stations (32)
				31	LEGEND: Table of Busy Lamp Field (BLF) states

Making a Call

Using the Off Hook/Answer (Operation) Key

Click in the dial display area to enter the number to dial then press the Off Hook/Answer (Operation) key

Using My Workgroup

Click on a My Workgroup Entry to dial its destination station or select a number from the right mouse menu

Using a Directory Entry

Double click on a directory entry to call its primary number or select a number from the right click menu

Using a Contact Entry in a Features Pane

Double click on an entry in Call Logs Display to call its primary number. In the Call Logs Display, a number can also be selected from the right mouse menu

Answering a Call (max 6 calls)

Using the Off Hook/Answer (Operation) Key

Answer by pressing the Off Hook/Answer (Operation) key

Using the Active Call Area

Answered by clicking on the alerting call in the Active Call Area

Terminating a Call

Using the Release Key

Terminate by pressing the Release key

Using the Active Call Area

Terminate by selecting release from the right mouse menu in the Active Call Area

Holding a Call

Using the Hold key

Hold a connected call by pressing the |Hold key

Using the Active Call Area

Hold a connected call by clicking on the call

Clicking in the Active Call Area free space will hold a connected call and provide dial-tone for making an outbound call

Divert Alerting Calls

Dragging to a My Workgroup

Divert to a My Workgroup destination station by dragging the alerting call from the Active Call Area and dropping it on a My Workgroup key

Dragging to a Directory Entry

Divert to a directory entry's primary number by dragging the alerting call from the Active Call Area and dropping it on a directory entry

Perform a Blind Transfer

Dragging to a My Workgroup

Blind transfer to a My Workgroup destination station by dragging the connected call from the Active Call Area and dropping it on a My Workgroup key

Dragging to a Directory Entry

Blind transfer to a directory entry's primary number by dragging the connected call from the Active Call Area and dropping it on a directory entry

Perform a Consultative Transfer

Using the Off Hook/Answer (Operation) Key

Commence a consultative transfer by pressing the Off Hook/Answer (Operation) key. The call is placed On Hold Pending Transfer and dial-tone is provided for the consultation call

Make the consultation call. Press Transfer to Complete the Transfer of the call to the transferee. Press Release to cancel and abandon the consultation call

Dragging a My Workgroup Entry to the connected call

Commence a consultative transfer by dragging a My Workgroup entry to the connected call. The call is placed On Hold Pending Transfer and the destination station for the My Workgroup entry is dialed for the consultation call.

Press Transfer to Complete the Transfer of the call to the transferee. Press Release to cancel and abandon the consultation call

Dragging a directory entry to the connected call

Commence a consultative transfer by dragging a directory entry to the connected call. The call is placed On Hold Pending Transfer and the primary number for the entry is dialed for the consultation call

Press Transfer to Complete the Transfer of the call to the transferee. Press Release to cancel and abandon the consultation call

Dragging a Call Log entry to the connected call

Commence a consultative transfer by dragging a call log entry to the connected call. The call is placed On Hold Pending Transfer and the primary number for the entry is dialed for the consultation call.

Press Transfer to Complete the Transfer of the call to the transferee. Press Release to cancel and abandon the consultation call

Call Scheduling

Commence a Scheduling by dragging My Workgroup or directory entries into the Scheduler Display.

Fill up the Call Scheduling window which pops up for call details and click ok.

When the scheduled time arrives a Scheduled Call Due window pops up. This window presents a choice of Dial to make the call, Snooze to defer for a user specified period, and Dismiss to remove the call from the Scheduler.

Call Stacking

Commence Stacking calls by dragging My Workgroup or directory entries into the Call Stack Display for making outbound calls.

Start or stop the stack through the right mouse menu, and calls can be skipped also from the right mouse menu.

The Call Stack inter-call delay is configurable at Tools—Options—Call Settings. The default delay value is seven seconds.

Conference (4 way Conference including yourself)

Commence a Conference by making calls to the required parties. (These could be a mixture of both Inbound or Outbound calls)

Right click on any call in the Active Call Area and select Conference to start the conference OR click on the Conference Flexkey to start the conference

To add a new party to the conference, Right click on the call in the Active Call Area and select Conference OR Right click on the conference call in the Active Call Area and select Conference OR click on the Conference Flexkey

You are NOT able to explicitly specify the party that you wish to conference

Email

Right Click a contact in My Workgroup or Directory to Email

Keyboard Shortcuts

Getting a line

Press the Num Enter key

Dialing a number

Press the Num Enter key (to get a line)

Type in the number

Press the Num Enter key (to dial)

Dialing a number with the highlighted directory highlighted

Press the Num Enter key (to get a line)

Press the Num Enter key (to dial)

Answering a call

Press the Num Enter key

Releasing a call

Press the Num + key

Holding a call

Press the Num - key

Resuming a call

Press Ctrl and Num (1–6) key combination, for the appropriate line or call

Transferring a call:

Press the Num Enter key to answer the call

Type the number (or type text and press Num

Enter to find a directory entry then move highlight to required entry)

Press the Num Enter key (to dial)

Press Num + to Cancel Transfer or press Num Del to Complete Transfer

www.broadviewnet.com

