

# Allworx Call Assistant 2.0 Quick Reference Guide



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## 1 Introduction

The Allworx® Call Assistant is a user-friendly graphical application intended to be used by an individual functioning in the role of an operator or receptionist. Call Assistant allows operators or receptionists to monitor the state of every line in the system and to effectively dispatch calls by answering, transferring, parking or sending to voicemail.

Call Assistant is a fully integrated PC software tool, which makes the operator's tasks easy and efficient. This intuitive software is designed to work in combination with any Allworx VoIP phone and the appropriate license key installed on the server.

Call Assistant is so easy to operate that you will be confident using most of its features after just a few minutes of using the application without reading a reference manual! This quick start guide will get you started on your first use and give you instructions for a few areas that you might need help with.

## 2 Login

When starting Call Assistant, login using the username that was assigned to you on the Allworx server and your voicemail password. Most users can set up the server address by using the automatic Search button to find the server.

The presence on your phone will be surrounded by dashes once logged into the Call Assistant application, for example, -In Office-.

Note: Your PC must be on the same LAN as your phone or the login will fail due to communication errors.

## 3 Views

The Call Assistant application has three distinct work areas or views: My Calls, Switchboard, and Outside Lines (if applicable). Each view, explained in a separate section, displays call information and expedites call handling.



Note: The application window and each of the views can be resized. To resize the view, place the mouse on the boundary and click-and-drag the boundary to the desired size.

When you receive an incoming call, you will hear the phone ring as well as see a new entry in the My Calls area showing the call. To answer: either double click on the call, or click on the call and then click the Answer button near the top of the Call Assistant window. Most of the other buttons on the task bar operate the same way – select an object to be acted upon (for example, a call) and then click the action button (for example, Release).

The use of the Call Assistant does not preclude your using the phone itself when that would be more convenient.

## 3.1 My Calls View

My Calls shows all calls currently being handled at the operator's extension. The calls are ordered with the oldest calls at the top of the view.

Every incoming or outgoing call associated with the operator's phone appears in the My Calls view. This view shows the following fields:

- Status – The phone icon will show if the call is:
  - Ringing
  - Active
  - On Hold
  - Parked
  - Ended
- Call – Displays caller-Id information such as name and number, if available.
- Line / Type – Displays the Line or Call Appearance of the operators phone that the call came in on or when out on. Information such as call is on hold or that the call is parked at an extension will also be displayed.
- Time – Shows the elapsed time of the call.

The following actions can be initiated on the calls:

- Answer
- Release
- Hold / Resume
- Transfer
- Transfer to Voicemail
- Park

Note: Clicking on the boundary line between field names and dragging it to a new position can resize the column width for each of the fields.

## 3.2 Switchboard View

The Switchboard view is a tabbed area showing the Company Directory, Auto Attendants, Parked Calls, Call Queues, and Call Monitors.

- Directory tab – displays all extensions configured in the Allworx system. Each box shows the extension number and user's name (or description). The field column widths can be resized by clicking on the boundary line between the first two columns then dragging the line to a new position. The view will fit as many columns as possible without having to horizontally scroll the view. The current status of each Allworx VoIP or analog handset is shown through fly-over mouse hints and the use of color.

Color	State
Green	Ringing
Red	Active
Gray	Idle
Amber	Do Not Disturb

Note: Extensions for third party handsets will always display Idle (grey).

- Auto Attend tab – lists all of the Auto Attendants configured on the Allworx system, which allows for the easy transfer of calls by selecting transfer on the toolbar then the desired Auto Attendant.
- Park Calls tab – lists all calls currently parked. The operator can double click on any of the calls listed to answer.
- Queues tab – displays all the Call Queues with corresponding descriptions. The operator can observe per queue how many calls are currently waiting and the duration of longest waited call, plus answer the next call in line by double-clicking on the queue.
- Monitors tab – shows the operator how many calls are currently sitting in each monitor and allows any call to be answered by double-clicking the monitor.

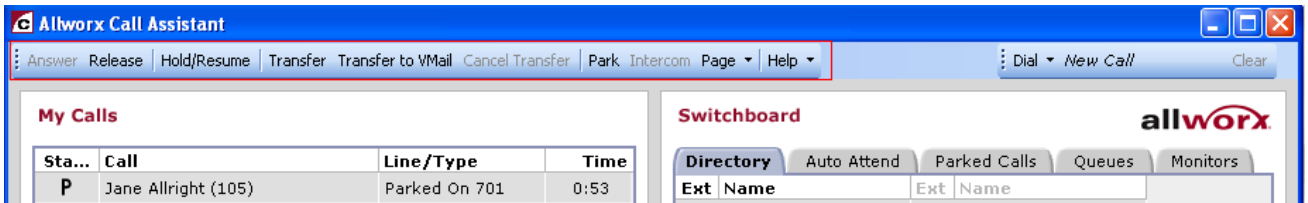
### 3.3 Outside Lines View

If your Allworx server is configured, all incoming lines will show up in the Outside Lines area. This area includes both VoIP and traditional analog CO lines. Placing calls using the outside lines can easily be made by selecting the desired button and using the dial pad to enter the number. Each line button shows the status through the use of color:

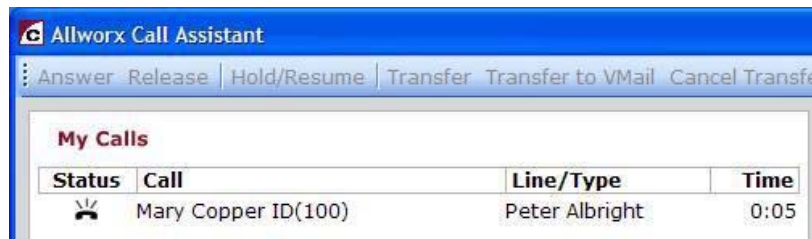
Color	State
Green	Ringing
Red	Active
Gray	Inactive



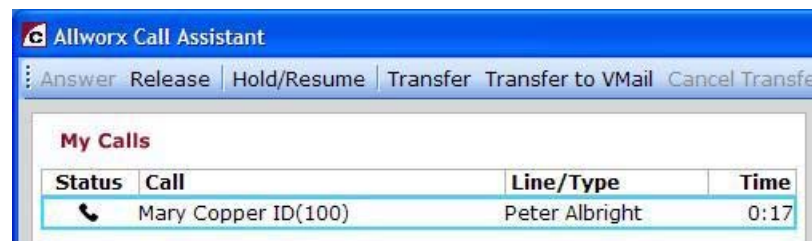
## 4 Product Features / Toolbar Options



Toolbar options have either an enabled or disabled state, which is based on the status of the call currently selected in the My Calls view. To perform any of the call options on the Call Assistant toolbar, a targeted call in My Calls must be selected. Selection indicated with a blue border surrounding the call.



Inbound call unselected



Active call selected

### 4.1 Answer

An inbound call will be displayed in the My Call view as ringing. This call can be answered by two methods:

1. Select the ringing call in My Calls view and then select Answer on the toolbar.
- OR-
2. Double click on the ringing call in My Calls view.

### 4.2 Release

End or drop the selected call in My Calls view.

### 4.3 Hold/Resume

When a call is placed on Hold, the Resume Toolbar option becomes active and is used to return to this call. The call indicates Hold in My Calls view with a blinking call icon in the status column.

Note: The call must be selected in My Calls view to Resume.

## 4.4 Transfer

Calls can be transferred to another person (extension) by performing either a blind transfer or attended transfer using Call Assistant.

Blind transfer – transfers to a targeted extension without an announcement:

1. Put the call on hold by selecting the Hold option on the toolbar.

Note: The call status changes to "Hold" in My Calls view.

2. Click Transfer on the toolbar.

Note: The Cancel Transfer option is enabled on the toolbar; all other call options are disabled.

3. Click the targeted extension in the Directory, Auto Attend, Queues, or Monitors tab.

Note: The Transfer operation can be performed by dragging the call to the destination on one of the four tabs.

4. Call changes to 'Ended' in My Calls view, then it is removed from the view.

Attended transfer – transfer to a targeted extension with an announcement to the target:

1. Place the call on Hold by selecting Hold option on the toolbar.

Note: The call status changes to "Hold" in My Calls view.

2. Dial or intercom the targeted extension to transfer the call to so they are aware of the transfer.

3. Place the targeted party on hold.

4. In the My Calls view select the original call (on hold) to be transferred.

5. Click Transfer on the toolbar.

6. Click the targeted extension call in My Calls view.

7. The call is immediately removed from My Calls view. The targeted extension call status changes to Ended, and then is removed from My Calls view.

## 4.5 Transfer to Voicemail

The operator can transfer a call directly to a user's voicemail with the Transfer to VMail option on the toolbar.

## 4.6 Cancel Transfer

After Transfer or Transfer to Voicemail has been selected, Cancel Transfer is enabled. Selecting this option will terminate the transfer operation and resume the call.

## 4.7 Park

The Park option places a call on hold to one of the designated parking extensions (701 through 709), which can be retrieved by any handset in the system or by the operator in the Park tab.

## 4.8 Intercom

Allworx phones on the same system can be used as intercoms with the Intercom toolbar option.

1. Select the targeted extension in the Directory view.
2. Select the Intercom toolbar option.
3. The phone will announce by ringing, upon completion of this you can start talking.
4. The person you called will hear you over the speaker.

For non-Allworx handset, using the Intercom option is functionally the same as placing a call.

## 4.9 Page

The operator can broadcast a message over the speaker of selected user's phones by using the Page option.

Call Assistant will execute one of the Allworx system paging zones to broadcast an announcement by selecting one of the zones from the drop-down menu under the Page toolbar option. This broadcast will go to the users assigned to that paging zone. By selecting the Page option without the dropdown, the first paging zone is executed. See the *Allworx System Administration Guide* for details on how to configure and assign users to the paging zones.

## 4.10 Dialing Calls

Call Assistant can help with various dial functions:

- Place a New Call – To place a new call, click the Dial button while *New Call* is displayed in the Number to Dial field (right of the Dial button). Dialing rules still need to be followed when using Call Assistant, i.e. Pin Codes.
- Dial an Extension – To dial an extension, select the extension under the directory tab (the extension will be displayed in the Number to Dial field). And click the Dial button. Alternatively, double-click the extension.
- Place a New Call on a Specific Outside Line – If your phone configuration is set up to monitor outside lines, a new call can be placed using a specific outside line by clicking on the outside line when it is idle.

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- Dial Digits in an Existing Call – To dial digits in an existing, right-click on the existing call and then select Dial Additional from the menu. This option allows for the menu selection within an Auto Attendant or voicemail client.

## 5 Feedback / Support

We would appreciate your feedback and feel free to provide any comments or suggestions to us at [support@allworx.com](mailto:support@allworx.com).