

## Initiate a Call

1. Select a phone list. Click **Tab** to display list.
- NOTE:** To create a phone list, refer to section Phone List.
2. Select a phone number. Click phone number to populate **Enter Phone Number** text box.
  3. Click **DIAL** button or press **Enter**.
  4. For initial calls, the phone rings, and then rings the called party after the telephone handset is lifted. When making a second call, clicking the **DIAL** button automatically holds the existing call.

**NOTE:** Phone numbers can be entered directly from the keyboard into the **Enter Phone Number** box, or can be dialed on the telephone.

## Answer a Second Call

For second calls only, telephone handset must be picked up on an initial call.

1. In **Call Control Area**, click to select call to answer.
2. Click **TALK** button (existing call held automatically).

## End a Call

1. In **Call Control Area**, click to select call to be released.
2. Click **HANG UP** button.

**NOTE:** If all calls have been released, telephone handset must be replaced before initiating next call.

## Place a Call on Hold

1. In **Call Control Area**, click to select call to hold.
2. Click **HOLD** button.

## Remove a Call from Hold

1. In **Call Control Area**, click to select call to remove from hold.
2. Click **TALK** button.

## Redial a Call

1. Click **REDIAL**.
2. If there are no other active calls, the phone rings, and then rings the called party after the telephone handset is lifted. The **Enter Phone Number** box does not populate with the number.

## Activate Do Not Disturb, Call Forwarding Always, or Remote Office

Click the text link (service abbreviation) to access the service configuration page.

**NOTE:** Phone will not ring while these services are on.

## Three-Way Conference Call

1. Answer or initiate first call.
2. Answer or initiate second call. This action automatically holds first call.
3. Click **CONFERENCE** button.
4. All calls are connected.

**NOTE:** To release one party of conference call, select call in **Call Control Area** and click **HANG UP**. To mute the call, click **CONFERENCE** then **HOLD**.

**NOTE:** While engaged in an active conference call, click **TRANSFER**. The two calls remain connected and the users are disconnected (call disappears from CommPilot Call Manager).

## System Buttons

### SUPPORT

Open a new e-mail message to report a problem to customer support.

### HELP

Get page-specific instructions; button is on every page.

### CONFIGURE

Access your service customization pages.

## Blind Transfer a Call

1. In **Call Control Area**, click to select the call to be transferred.
2. Select phone number using Tabs or enter on keyboard.
3. Selected number displays in **Enter Phone Number** box.
4. Click **TRANSFER** button.

## Transfer with Consultation

1. In **Call Control Area**, click to select the call to be transferred.
2. Click **HOLD**.
3. Select phone number using Tabs or enter on keyboard.
4. Selected number displays in **Enter Phone Number** box.
5. Click **DIAL** button.
6. Speak with active call.
7. Click **TRANSFER** button (with no number specified in the **Enter Phone Number** box).
8. Two existing calls are connected.

## Send a Call to Voice Mail

1. While the phone is ringing and the call is displayed, click the call to send to voice mail in the Call Control Area.
2. To send to your own voice mailbox, click **SEND TO VM**.
3. To send to the voice mailbox of another user, enter the extension in **Enter Phone Number** box and click **SEND TO VM**.

## CommPilot Express

Manage your incoming calls according to CommPilot Express profiles. Enter your profile information on the *Outgoing Calls - CommPilot Express* service configuration web page. Click the drop-down arrow on the CommPilot Call Manger to select your current status.

**NOTE:** If you access your web portal through a traditional telephone system, you use CommPilot Express SR. The “Available – In the Office” and “Available – Out of the Office” profiles are different from those described here. For more information, go to the *Outgoing Calls – CommPilot Express SR* service configuration web page.

The image shows a screenshot of the CommPilot Express configuration interface. It features four overlapping windows, each representing a different status profile:

- Unavailable:** Contains a checkbox labeled "Send all calls to Voice Messaging except...".
- Available - Out of the office:** Partially visible behind the other windows.
- Available - In the Office:** Includes a field for "Also Ring this Phone Number", a section for "If Busy:" with radio buttons for "Have Voice Messaging take the call" and "Forward to this Phone Number", and a section for "If No Answer:" with similar radio button options.
- Busy:** Includes a checkbox for "Send all calls to Voice Messaging except calls from these Phone numbers", three input fields for phone numbers, a field for "which will be forwarded to", a checkbox for "Also Email me a notification when a Voice Message is received to", and an "Email Address" field.

### Available - In the Office

Indicate how you want calls handled when you are in the office. Choices include ringing additional phones when your phone rings, and what to do if your phone is busy or if you don't answer.

### Available - Out of the Office

Indicate how you want calls handled when you are available to receive calls, but out of the office. You can forward all calls to your current location, or have Voice Messaging answer the call. You can also have a text message sent, indicating when a call is received.

### Busy

Indicate how you want calls handled when you are busy. You can forward calls from selected numbers, send all calls to Voice Messaging, and have a text message sent, indicating when a call is received.

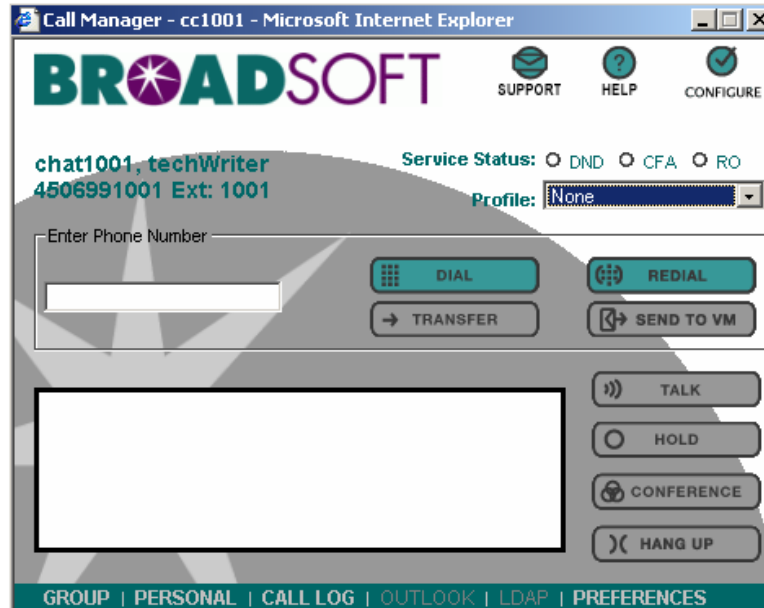
### Unavailable

Indicate how you want calls handled when you are not available, such as when you are on vacation. You can forward calls from selected numbers, and specify a Voice Messaging greeting to be heard by all callers.

### None

If you select this option, none of your profiles are in use. Any other services you may have activated are used to handle incoming calls.

**NOTE:** You should not configure other services, such as Call Notify, Call Forwarding, or Simultaneous Ring if you use CommPilot Express.



From the CommPilot Express service configuration page, specify how calls will be handled in varying circumstances (above) and then select the CommPilot Express profile from the Call Manager (left).

## Phone Lists

- Click the link (phone list name) at the bottom of window to expose phone list; click again to close.
- Click phone number to populate **Enter Phone Number** text box.

**NOTE:** If One-Click Dialing is enabled on the *Preferences* page, the call will process when clicked.

**GROUP** is configured by the group administrator and accessible as a dial list from the CommPilot Call Manager tab, at left. Use the **SUMMARY** and **DETAIL** buttons to open new browser windows with complete phone lists for printing.

**PERSONAL** is created and edited by users. The list allows users to create their own list of frequently called numbers. Text files of names and phone numbers can be loaded to the Personal Phone List using the import feature.

To add phone numbers to your Personal phone list, go to Outgoing Calls – Personal service configuration Web page.

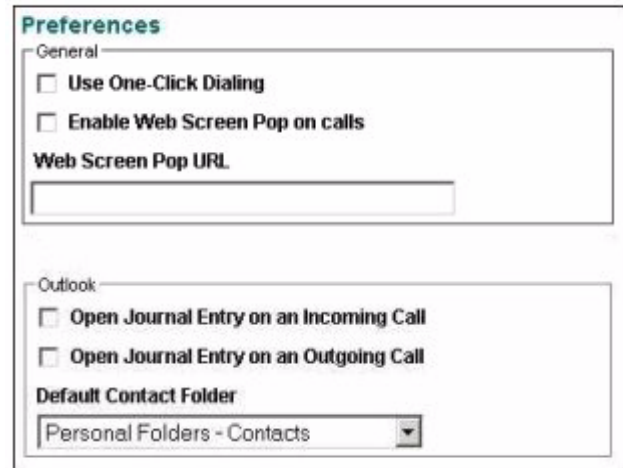
**OUTLOOK** See the following page for Outlook Integration details.

**LDAP** is a list of contacts from your LDAP directory.



## PREFERENCES

- allows you to:
- Use one-click dialing from phone lists to the Call Manager (requires a Network Server configured to dial without a “1” for long-distance calls).
  - Enable a specified web page (such as the front end of a customer database) to display for incoming and outgoing calls.
  - Open Microsoft Journal entries when placing calls, receiving calls, or both.
  - Specify the default location for Outlook Contacts.



## Outlook Integration

- Click **Tab** to expose Outlook Contacts; click again to close.
- Click phone number to populate **Enter Phone Number** text box.
- Click name in list or **Card Icon** in **Call Control Area** to show v-card of contact. Called or calling parties with v-card have **Card Icon** to left of name in **Call Control Area**.
- Click **REFRESH** to expose newly entered contacts.
- Use scroll bar to view up to 25 contacts. Contacts not displayed must be searched for, or use the **FIRST PAGE**, **PREVIOUS**, **NEXT**, and **LAST PAGE** buttons.

**NOTE:** Upon initial use of **Outlook Contacts** list, click Yes in security warning dialog box to install and run BroadSoft component permitting access to Outlook Contacts.

### Search

1. Select **Outlook Folder** to search.
2. Select search criteria in drop-down menu.
3. Enter search criteria in text box.
4. Click **SEARCH**.

Up to 25 contacts meeting criteria display. To reduce further, search again with more specific criteria, or use paging buttons to view additional search results.

# BROADWORKS® CommPilot Call Manager Quick Reference Guide

Contacts newly entered in Microsoft Outlook display when **REFRESH** is clicked.

**NOTE:** If the CommPilot Call Manager is started before Outlook, Microsoft will prompt you to verify your settings. Click "OK" to continue. To avoid this dialog box, open Outlook before starting the CommPilot Call Manager.

**Call Manager - cc1001 - Microsoft Internet Explorer**

**BROADSOFT** SUPPORT HELP CONFIGURE

chat1001, techWriter  
4506991001 Ext: 1001

Service Status:  DND  CFA  RO  
Profile: None

Enter Phone Number

DIAL REDIAL  
TRANSFER SEND TO VM

TALK  
HOLD  
CONFERENCE  
HANG UP

GROUP | PERSONAL | CALL LOG | **OUTLOOK** | LDAP | PREFERENCES

**Outlook Contacts**

Folder: Personal Folders - Contacts

Search Contacts: Name [ ] SEARCH

Name/Company	Business	Home	Mobile
<a href="#">Cowan, Frida</a> <a href="#">Cowan Enterprise</a>	<a href="#">+1 (416) 823-0034</a>	-	<a href="#">+1 (514) 416-8282</a>
<a href="#">Frame, Jane</a> <a href="#">Air Express</a>	<a href="#">+1 (514) 797-9090</a>	<a href="#">+1 (514) 766-2882</a>	-
<a href="#">Free, George</a>	<a href="#">+1 (514) 424-0303</a>	<a href="#">+1 (514) 889-2020</a>	-
<a href="#">Zoloff, Howard</a> <a href="#">Xerox</a>	<a href="#">+1 (514) 626-9992</a>	-	<a href="#">+1 (514) 223-7878</a>

REFRESH