Wave ViewPoint User Guide

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Revision History

Release	Date	Documentation Changes	Page No.
2.5	**10/11**	**GENERAL RELEASE**	
		ViewPoint can now be installed on the Wave Server for administrative purposes only.	---
		Added section “Performing automatic updates” describing how **ViewPoint will automatically update on your PC when a new version is available**.	2-2
		Added section “Automatically displaying account code information for contacts.”	5-7
		Added section “Adding bookmarks to a voice message”. If a voice message contains bookmarks, the **bookmarks are now included when the voice message is forwarded to a gateway user** (a user on another Wave system in a WaveNet network).	7-9
		Added new routing list action option: **When calling a ViewPoint Group, you can now specify that Group members who are on the phone will not be called**.	9-18
2.0 SP1	**03/11**	**SERVICE PACK RELEASE**	
		Added section “Installing ViewPoint”, including an important note to **never install ViewPoint on the Wave Server**.	2-2
		The **ViewPoint Incoming Call Alert window can now display up to 3 Call Monitor fields** in addition to caller name and number.	5-18
		Added note on how to set different incoming call alert options for Call Monitors that have been shared with you.	12-14
		Added appendix “Troubleshooting ViewPoint Problems”.	D-1

Revision History

Release	Date	Documentation Changes	Page No.
2.0	**09/10**	**GENERAL RELEASE**	
		Added section “What’s new in this version” that describes how to view a list of new ViewPoint features.	1-1
		You can now choose the **ViewPoint softphone** as your primary or secondary phone when you log on. See section “Using ViewPoint with a different phone or Wave Server“.	2-10
		You can now **share folders** with other users. Your Wave system administrator sets up sharing, as well as the access permissions that control, whether the other users view the contents of the shared folders or view and act on the contents (for example, take another user’s call via a shared Call Monitor.	2-35
		You can now **modify personal status preferences** to reflect your changing availability and location, or to customize how your calls will be handled.	3-1
		Wave IMpulse supports simple, secure, user-to-user instant messaging in ViewPoint.	4-4
		The new **All tab in the Call Monitor** displays all calls to and from your phone, all queue calls for any queue that you are currently logged into, and all calls from other users’ Call Monitors that have been shared with you.	5-3
		Added note that to supervise a call, at least one party in the call must be from the local Wave system.	6-13
		A **Wave mobile extension** allows your remote phone to be treated as a Wave station so that you can use ViewPoint to manage your voice messages and greetings, place outbound calls, answer and manage calls displayed in the Call Monitor, and so forth.	6-17
		Wave Mail allows you to synchronize your voice messages and contacts between Wave and your e-mail program.	7-27
		Added note to table in section “Viewing call details” clarifying the “Blind transfer” and “Supervised transfer” results.	8-3
		In the Call Transfer report, filtering calls by all users or by a ViewPoint Group is now supported, in addition to the previous options (individual user or queue). Also, the **new Inbound Calls column on the Data tab** allows you to compare the number of calls received by vs. transferred to each target during the reporting period.	13-16

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Release	Date	Documentation Changes	Page No.
1.5 SP3	**09/09**	**SERVICE PACK RELEASE**	
		Two additional ViewPoint reports are now available on all systems with no licensing requirements. See sections “Call Transfer report” and “User Call Trends report.”	13-16, 13-23
1.5 SP2	**05/09**	**SERVICE PACK RELEASE**	
		Added important note on not using the ViewPoint Call Monitor to manage calls to a virtual extension.	5-7
		Added steps to **display ViewPoint Group tabs in the Contacts folder**.	10-3
		Added a **new chapter “Running Contact Center Reports”** that describes call activity and phone usage reports available from the ViewPoint Tools menu.	13-1
1.5	**11/08**	**GENERAL RELEASE**	
		Added the **Call Monitor “Report a Problem”** feature.	C-2
		Updated Appendix B with **current command line arguments**.	B-1
		Removed references to Exchange synchronization.	--
		Added a note that Call Waiting is not always supported.	12-6
		Added **“Flag a call” button in Call Monitor**.	5-17
		Added **Extensions tabs** section.	4-3
		Revised screenshot in Groups chapter.	10-18
		Revisions to Archive Recording Browser section.	A-1
		Added screenshot and description of Call Monitor Parties pane.	6-9
		Changed “workgroup” to “group” throughout.	--
		Added **“Personal Status” chapter**.	3-1
		Revised voicemail notification scheduling.	7-19
1.0 SP2	**1/08**	**SERVICE PACK RELEASE**	
		Added **“Customizing” chapter**.	12-1
		Added **“Routing Lists” section**.	9-5
		Added **“Call Rules” chapter**.	11-1
		Added Revision History table.	this page

Revision History

Release	Date	Documentation Changes	Page No.
1.0	**10/07**	**GENERAL RELEASE**	
		Initial Release.	---

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Introducing Vertical Wave

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About Vertical Wave ViewPoint

Vertical's award-winning Wave ViewPoint integrates your phone and Windows PC to make your phone a much more powerful tool, dramatically expanding the ways in which you can place, receive, and manage your phone calls.

What's new in this version

To learn about the new ViewPoint features in this version, in ViewPoint click **Help > Contents and Index**, and then choose **Release Notes > What's new in this version** from the Contents pane.

Installing ViewPoint

If you need to install or upgrade your version of ViewPoint, contact your Wave administrator, or see Chapter 9 in the *Wave Server Installation Guide*.

Accessing Wave

You can access Wave in any of the following ways. Each method is described below.

- Wave ViewPoint
- Wave TAPI Service Provider and Contact Manager Assistant
- Your phone

Using ViewPoint

This manual describes how to use ViewPoint, Wave's easy-to-use Windows interface. With ViewPoint you can point and click to play voice messages and place calls, access contacts and users, and more. To jump right into using Wave ViewPoint, skip to Chapter 2.

Using the Wave TAPI Service Provider and Contact Manager Assistant

If you make extensive use of contact management applications or customer relationship management software that are TAPI-compatible, such as Microsoft Outlook, GoldMine, GoldMine FrontOffice 2000, or Act!, you can install the Wave TAPI Service Provider and place Wave calls to contacts directly from those applications. You do not need to have Wave ViewPoint installed on your computer to use the TAPI Service Provider.

The TAPI Service Provider links your contact management applications to your Wave phone, just as Wave ViewPoint is linked to your phone. After the TAPI Service Provider is installed, you can use your contact manager application's Place Call feature to call its contacts using your Wave phone. Ask your Wave system administrator to install the Wave TAPI Service Provider, and then follow the instructions in your contact manager application for placing calls.

You can also install the Wave Contact Manager Assistant (CMA) and receive screen-pops for calls that show the name, the Caller ID, and the time of day of the call. You do not need to have Wave ViewPoint installed on your computer to use the CMA.

Note: With Act!, you can receive screen-pops without installing the CMA.

For more information, see the Wave TAPI Service Provider Help and the Wave Contact Manager Assistant Help.

Using your phone

Voice prompts guide you to enter Wave phone commands via your phone's keypad. Depending on your phone type (SIP, digital, or analog), you can also use phone feature buttons or soft keys to access Wave features. For more information, see the *Wave Phone User Guide*, or the *Wave Phone Quick Reference Guide* specific to your phone type.

Feature comparison table

The following table shows the major features that are available in Wave, via ViewPoint, the phone menu prompts, or the Contact Manager Assistant (CMA). If your Wave system does not include some of these features, your Wave system administrator may have made them unavailable to you.

Feature	ViewPoint	Phone	CMA
Managing voice messages	Yes	Yes	No
Placing, receiving, and handling calls	Yes	Yes	Some
Managing participants in conference calls	Yes	No	No
Managing contacts	Yes	No	Yes
Screen-pops for incoming calls	Yes	n/a	Yes
Managing Groups	Yes	No	No
Viewing the Extensions list	Yes	No	No
Viewing the Call Log	Yes	No	No
Recording greetings	Yes	Yes	No
Forwarding calls	Yes	Yes	No
Managing routing lists	Yes	No	No
Managing call rules	Yes	No	No

Feature	ViewPoint	Phone	CMA
Changing the active greeting	Yes	Yes	No
Changing the active routing list	Yes	No	No

Getting technical support

Contact your Wave system administrator for technical support. For information on how to report problems, see Appendix C.

You can get help through Wave documentation as described in the next section.

Wave documentation

Related reading

The following documents are included with Vertical Wave in Acrobat format, and can be found on the Vertical Wave Documentation CD.

For information about this version of Vertical Wave, including new features, known issues, and other late-breaking information, see the Release Notes included on the Documentation CD.

Manuals

- *Wave Phone User Guide*. Describes how to use digital phones, SIP phones, and analog phones with Wave.

Quick Reference Guides

- *Wave Analog Phone Quick Reference Guide*. Provides instructions for using analog phones with Vertical Wave.
- *Wave Digital Phone Quick Reference Guide*. Provides instructions for using Vertical Edge digital phones.

- *Wave SIP Phone Quick Reference Guide*. Provides instructions for using Vertical Wave SIP phones.
- *Wave Voice Mail Quick Reference Guide*. Provides instructions for using Vertical Wave voicemail features.

Accessing Help

From any Wave dialog, you can press F1 or click **Help** to get context-sensitive Help describing the window and its individual fields.

Using ViewPoint

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About ViewPoint

ViewPoint provides a central place to manage your calls, voicemail, contacts and Wave account in an easy-to-use, graphical Windows interface. In ViewPoint you can quickly and easily drag and drop to transfer or conference calls, point and click to hear voice messages or call people back, set up call rules and “follow me” call forwarding to handle important callers, monitor Contact Center queues, and more.

Even without ViewPoint, you can still access many Wave functions by using the phone commands. For details, see the *Wave Phone User Guide*.

Installing ViewPoint

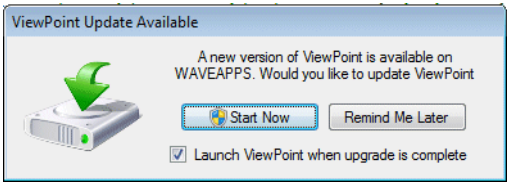
See your Wave system administrator about installing ViewPoint on your computer.

Important: Viewpoint may be installed directly onto the Wave Server for administrative purposes only.

For more information about ViewPoint requirements, see Chapter 9 in the *Wave Server Installation Guide*.

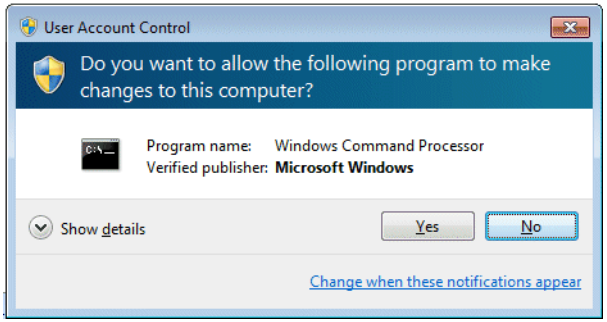
Performing automatic updates

When a new version of ViewPoint is available, you will see the following message when you log on:



You have 2 options:

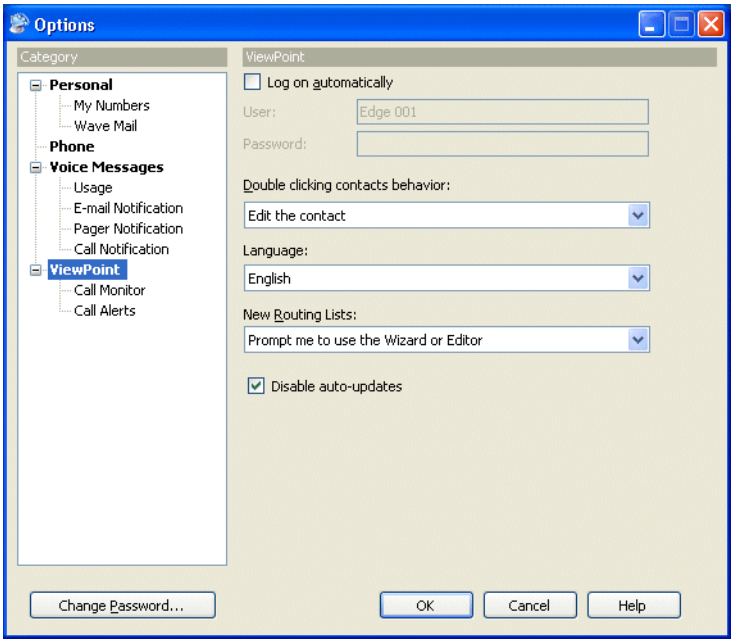
- Click **Start Now** to start the auto-update. (By default, the **Launch ViewPoint when upgrade is complete** checkbox is selected to start the new version of ViewPoint automatically when the update is complete.) One of the following happens:
  - **If you are logged on using a Windows administrator account**. When the User Access Control dialog opens, click **Yes** to continue.



- **If you are not logged on using a Windows administrator account**. You are prompted to grant the installer program administrative rights by entering the valid user name and password of a Windows administrator account:

- Click **Remind Me Later** if you are busy and do not want to be interrupted. If you choose this option, the auto-update message will not be presented again for 24 hours.

Note: By default, the ViewPoint auto-update process is enabled for all ViewPoint users. You can disable auto-update in ViewPoint by choosing **Tools > Options** and then de-selecting the **Disable auto-updates** checkbox on the ViewPoint tab.



Using ViewPoint remotely

If your office's network is set up so you can log on remotely via a Virtual Private Network (VPN) connection, you can use ViewPoint from another location as if you were on the network at your office. Contact your network administrator to see if you have VPN support and how to start VPN from your remote computer.

Important: ViewPoint will not run without a network connection to your Wave Server. Be sure you have an active VPN connection to your office before launching ViewPoint.

Using ViewPoint with a remote phone

A remote phone is any phone that is external to the Wave system, for example a cell phone, home phone, or legacy PBX phone. You can use a remote phone with or without ViewPoint.

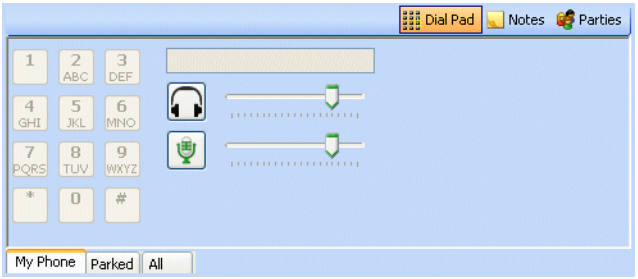
You specify a remote phone number when you log on to ViewPoint. See "Using ViewPoint with a different phone, Wave Server, or language" on page 2-10.

When you use a remote phone with ViewPoint, you can use ViewPoint to manage your voice messages and greetings, place outbound calls, answer calls displayed in the Call Monitor, and so forth. Also, depending on how your Wave system administrator configured your account, you may be able to use ViewPoint to visually manage calls that are forwarded to your remote number or routed to your remote number as a result of an action in your routing list.

For more information, see "Using a remote phone" on page 6-17.

Using the ViewPoint Softphone

The ViewPoint Softphone is software included with ViewPoint that appears as a new Dial Pad tab at the bottom of the Call Monitor.,



You can use the controls on this tab to switch between your headset vs. PC microphone and speakers, adjust call volume, and so forth. You use the number keys on this tab to send DTMF tones while you are on a call, for example in response to prompts from an IVR application. (The number keys are disabled unless you are on a call.)

Important: In this version, you cannot place a call using the number keys on the ViewPoint Softphone Dial Pad tab. Use any of the standard ViewPoint methods to place a call, as described in “Placing calls using the ViewPoint Softphone” on page 6-16.

If you have been configured to do so by your Wave administrator, you can use the ViewPoint Softphone in either of the following ways:

- **As your primary phone**, if you do not have a physical phone. You can use the ViewPoint Softphone as your primary phone from the local LAN or when you run ViewPoint while logged in via VPN from a remote location.
- **As your secondary phone**, when you are away from your physical phone, for example when you are on the road.

You specify the ViewPoint Softphone when you log on to ViewPoint. See “Using ViewPoint with a different phone, Wave Server, or language” on page 2-10.

You must have audio playback and capture devices (microphone, speakers, headset, or other USB audio devices) on your PC or laptop in order to logon using the ViewPoint Softphone. The default device settings work in most cases. To change the default settings, see “Configuring the ViewPoint Softphone” on page 12-10.

For instructions on how to place, answer, and handle calls using the ViewPoint Softphone, see “Using the ViewPoint Softphone” on page 6-14.

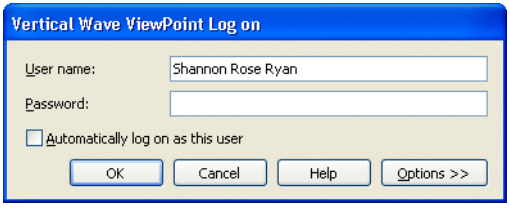
Logging on to ViewPoint

To use ViewPoint, you must log on using a valid Wave user account. Ask your Wave administrator for the information you need to use to log on.

Note: Each running ViewPoint program requires a license. If you see a message stating that you have exceeded your ViewPoint licenses, you cannot log on. See your Wave system administrator for help if such a message appears.

To log on to ViewPoint

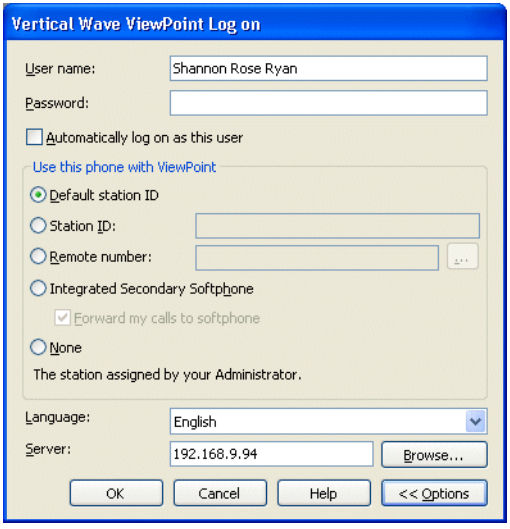
1. Choose **Start > Programs > Vertical Wave ViewPoint > Wave ViewPoint**. The ViewPoint Log On dialog opens.



2. Enter your user name in the **User Name** field if it is not already displayed. If you do not know your user name, ask your Wave system administrator.
3. Enter your numeric password in the **Password** field. Use the same password that you use to log into your Wave voicemail account using the phone.
4. If you want to skip the process of logging on to the Wave ViewPoint in future sessions, check **Automatically log on as this user**.

5. If you check **Automatically log on as this user**, anyone at your computer can open your ViewPoint program and listen to your voice messages, because ViewPoint will open without requiring a password.

6. If you need to change login options, for example to use ViewPoint at a different location than your normal location, click **Options >>** to display additional settings. See “Using ViewPoint with a different phone, Wave Server, or language” on page 2-10 for more information about each option.

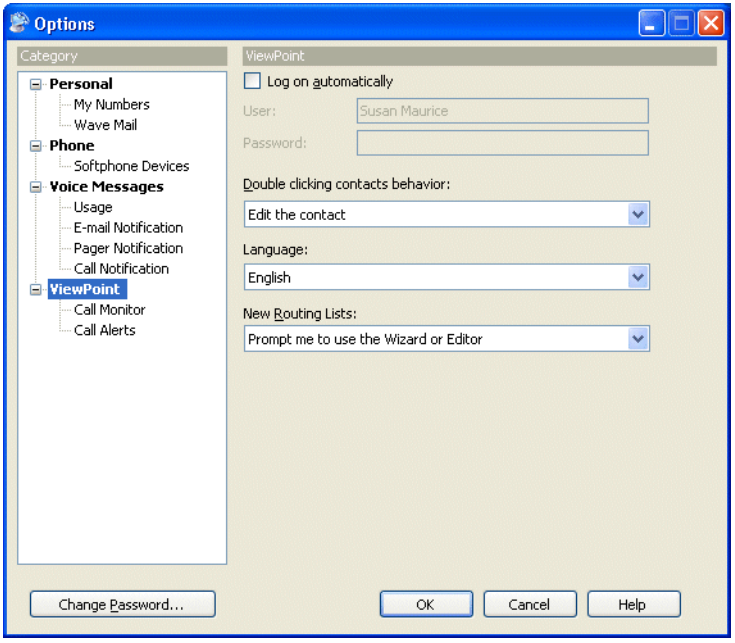


7. Click **OK** to launch ViewPoint.

Disabling automatic logon

The automatic logon feature allows you to skip the process of logging on to ViewPoint in future sessions. If you previously selected the **Automatically log on as this user** option and now want to turn it off, do the following:

1. In ViewPoint, choose **Tools > Options**. The Options dialog opens.
2. On the ViewPoint tab, deselect the **Log on automatically** checkbox.



3. Click **OK**.

Using ViewPoint with a different phone, Wave Server, or language

There may be times when you need to modify the options you normally use when you log on to ViewPoint. To change logon options, click **Options >>** in the ViewPoint Logon dialog.

This section describes how to do the following:

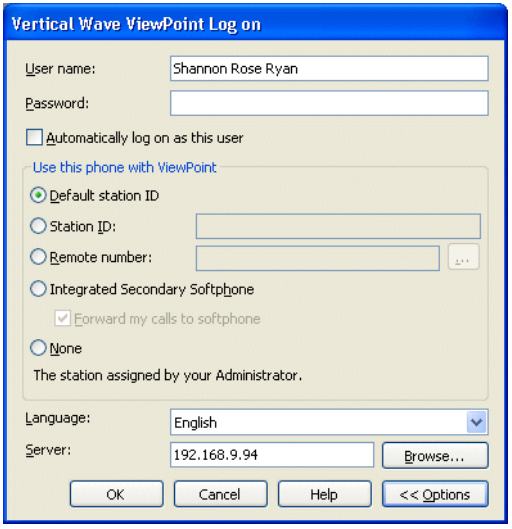
- **Change the Wave phone associated with ViewPoint.** ViewPoint works best in conjunction with a phone. ViewPoint can be associated with only one phone at a time. This phone will ring whenever you use a ViewPoint command that requires ringing your phone, for example, playing a voice message over the phone, using the **Place Call** command, or making a call recording. You can change the associated phone when you want to use a different phone with ViewPoint (for example, your PC has been moved to a different office, you are visiting at another company location, and so forth.)

  Note: You can also change the associated phone after logging on by selecting **File > Use a different station**.

- **Use the ViewPoint Softphone** in as your primary or secondary phone. See “Using the ViewPoint Softphone” on page 2-6 for an overview of the ViewPoint Softphone.
- **Use a phone that is external to the Wave system** to log on to ViewPoint, for example if you are using a remote phone or mobile extension.
- Change the language used for the ViewPoint user interface.
- **Change the Wave Server that you connect to**. ViewPoint connects to a specific Wave Server server. If multiple Wave Servers are available on your network, you can change the one to which ViewPoint is connected. You must also change the Wave Server name if the network name of its computer has changed.
- **Use ViewPoint without an associated phone**. Note that if you do so, ViewPoint commands that require a phone (for example, managing calls or making call recordings) will not be available to you.

To change ViewPoint login options

1. Start ViewPoint as described in the previous section. If your system logs you on automatically, you can change the options after ViewPoint starts by choosing **File > Use a different station**. The expanded ViewPoint Log On dialog opens:



2. In the **Use this phone with ViewPoint** section, specify the phone with which ViewPoint is associated in one of the following ways:

   - **Default station ID**. Select this option to use one of the following as your ViewPoint phone. (You can select this option for a Wave phone in the office or a mobile extension.)
     - **Default station ID of your physical phone**. This is typically your own phone at your own location.
     - **Your primary softphone**. If you do not have a physical phone, you can use the ViewPoint Softphone to place and take calls, using your PC's microphone and speakers, headset, or other USB audio devices. See "Using the ViewPoint Softphone" on page 2-6 for an overview of the ViewPoint Softphone.

   Note: A physical phone or a primary softphone is configured for you by your Wave administrator when you are added to the system.

- **Station ID**. To log on to ViewPoint using a different Wave phone, for example if you are a guest at another location or temporarily using a different office, select this option and enter that phone's station ID. To obtain a Wave phone's station ID, pick up the phone and press ***00**. (You can select this option for a Wave phone in the office or a mobile extension.)
- **Remote number**. Select this option to log on to ViewPoint using a phone that is external to the Wave system, for example if your Wave system administrator has configured you to use a mobile extension. Enter the phone number of that phone, for example 6175551212. Click ... to open the Check Remote Number dialog to view or make corrections to the actual dial string that will be used based on the remote number that you enter here (see "Specifying options for a remote number" on page 2-13 for details).
- **Integrated Secondary Softphone**. Select this option to log on to ViewPoint using the ViewPoint Softphone as a secondary phone when you are away from your regular physical phone. See "Using the ViewPoint Softphone" on page 2-6 for an overview of the ViewPoint Softphone.
  - **Forward my calls to softphone**. Optionally, select this checkbox to automatically forward your calls to your softphone. (Selecting this checkbox at logon saves you the step of manually changing your default call forwarding number after logging on.)
- **None**. Select this option to use ViewPoint without an associated phone. ViewPoint commands that require a phone (for example, managing calls or making call recordings) will not be available to you.

3. Select the **Language** for the ViewPoint user interface from the drop-down list. (For another way to change the ViewPoint display language, see "Using ViewPoint in languages other than English" on page 2-15.)
4. In the **Server** field, enter the network name of the Wave Server that ViewPoint will connect to when you log on. If you have more than one Wave Server on your network, you can choose which one to connect to. Click **Browse** to browse the network and select a Wave Server.
5. Click **OK**.

Specifying options for a remote number

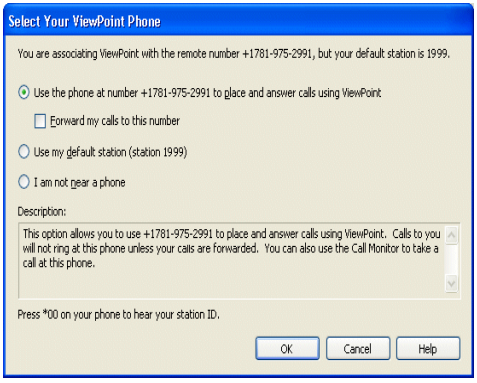
If you selected **Remote number** in the ViewPoint Login dialog, you can click ... to open the Check Remote Number dialog to specify how Wave will actually dial the remote number that you entered.

The number as it will be dialed after dialing rules are applied is displayed in the middle of the dialog. This displayed dial string may be modified as you make changes as described below.

1. In the **Call Using** section, select one of the following options:
   - **Default Phone number access code**. Select this option to dial this number using the Default Phone number access code set up by your Wave system administrator.
   - **This access code**. Select this option to use a different access code. Ask your Wave system administrator if other access codes are available for your use.
2. Select the correct **Country/Region** from the drop-down list.
3. Verify that the remote **Number** you entered via the ViewPoint Logon dialog is correct.
4. If the **Use country code and area code dialing rules** checkbox is selected, Wave applies the country code and area code dialing rules set up by your Wave system administrator. For example, the area code will not be included for a local call. If this checkbox is not selected, Wave dials the **Number** exactly as you entered it.
5. Click **OK**.

Using ViewPoint with another station ID

Most Wave users have a default station ID, which represents the phone your Wave system administrator assigned to you (if you roam between phones your station ID may be 0). When you log on to ViewPoint specifying an associated phone other than your default station, the Select Your ViewPoint Phone dialog opens, enabling you to clarify which phone you want to use with ViewPoint.



To use ViewPoint with another station

1. In the Select Your ViewPoint Phone dialog, choose one of the following options:

   - **Use station *n* as a visitor.** This option appears only if you specified another user's station as your associated phone—for example, you are logging on at another user's desk. The phone remains set for its normal user, but ViewPoint is set for you. Calls you place and receive using the phone use the normal user's account (for example, the dialing permissions) and appear in the normal user's Call Log.

     Example: However, calls you place and receive using ViewPoint commands use your account. Choose this option if you do not intend to use the phone extensively during this ViewPoint session.

   - **Use <this phone > to place and answer calls... .** The phone (station or remote number) is set for you. Calls you place and receive using the phone use your account settings. Choose this option if you will be using the phone as your own during this ViewPoint session.

     Example: If you choose this option, you can also select **Forward my calls to this station / number** to receive calls to your own extension here. For more information about call forwarding, see "Forwarding calls" on page 9-2.

- **Use my default station.** Your default station remains ViewPoint's associated phone. Whenever you use a ViewPoint command that requires the phone—for example, to play a voice message—ViewPoint uses your default station. Choose this option only if your default station is nearby.
- **I am not near a Wave phone.** You log on with station ID 0, meaning that ViewPoint is not associated with a phone. ViewPoint commands that require a phone—for example, placing a call—are unavailable.

  Note: When you run ViewPoint without an associated phone, the Call Monitor folder title bar displays "No associated phone" as a reminder.

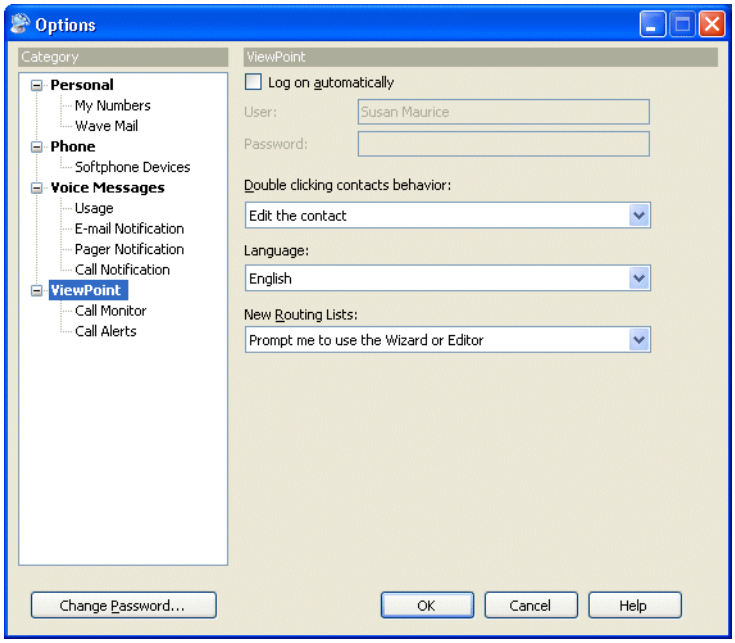
2. Click **OK**. ViewPoint opens with the phone selection you made.

Using ViewPoint in languages other than English

You can display the ViewPoint interface in various languages. ViewPoint will automatically adjust to the proper language when your Windows language (as set in the Windows Control Panel) matches one of the supported languages.

To change the ViewPoint display language

1. In ViewPoint, choose **Tools > Options**. The Options dialog opens.
2. Click the ViewPoint tab.



3. Choose the **Language** for the ViewPoint user interface from the drop-down list.
4. Click **OK**. Your change takes effect the next time that you start ViewPoint.

You can also specify the language to use when you log on to ViewPoint. See “Using ViewPoint with a different phone, Wave Server, or language” on page 2-10.

Changing your station, Wave Server name, or user name after logging on

You can log on as a different user, or with a different associated phone, without exiting and restarting the ViewPoint program. This feature makes it easy to log on to another user's account from your ViewPoint, or to switch ViewPoint's associated phone. (To log on to another user's account, you must know the other user's password.)

To log on as a different user, choose **File > Log on as a different user**. The Wave ViewPoint Log On dialog opens. See "Logging on to ViewPoint" on page 2-7.

To change ViewPoint's associated phone, choose **File > Use a different station**. The Wave ViewPoint Log On dialog opens with your name and password already entered and the Options showing.

Changing your password

To change your password via ViewPoint

1. Choose **Tools > Options**. The Options dialog opens.
2. Click **Change Password**. (The **Change Password** button is located at the bottom of each tab in the Options dialog.) The Change Password dialog opens.

3. Use the following fields to change your password:
   - **Old password**. Enter your current password.
   - **New password**. Enter your new password.
   - **Verify new password**. Enter your new password to confirm it.
4. Click **OK** to close the Change Password dialog, and then click **OK** to close the Options dialog.

Logging on with command-line switches

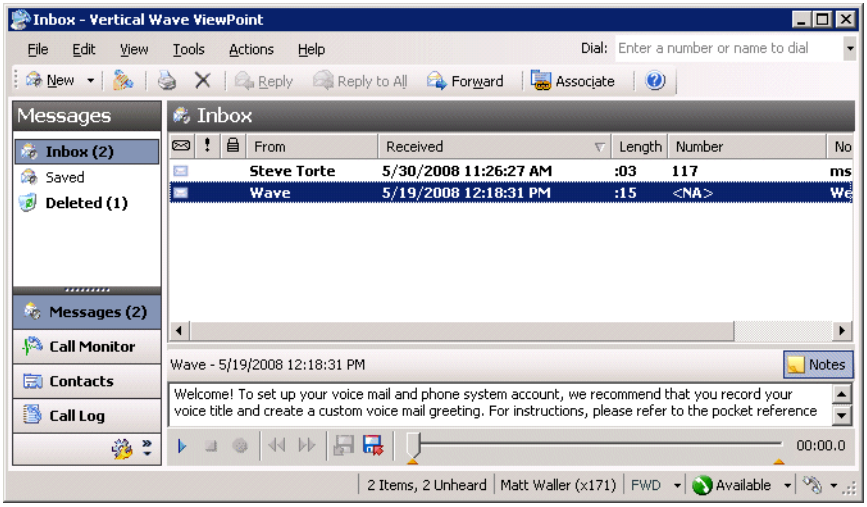
You can add switches to the Windows shortcut command line that starts ViewPoint. The command line switches enable you to run multiple copies of ViewPoint at once connected to different phones or Wave servers, log on using a particular station, and perform other tasks. See Appendix B for more information.

Exiting ViewPoint

To exit ViewPoint, choose **File > Exit**.

Elements of the ViewPoint window

The following graphic shows a typical window in ViewPoint, in this case the Inbox that contains your voice messages.



The ViewPoint window contains the following elements:

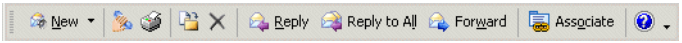
- The menu bar
- The toolbar
- The navigation pane
- The status bar
- The ViewPoint folder that is currently displayed (see “Working in ViewPoint folders” on page 2-22)

The Menu Bar

The *menu bar*, at the top of ViewPoint, provides access to Wave commands. Click each menu to see the commands that menu contains. Menu commands are referenced in this manual in the format **File > New > Contact**. You can drag the menu bar from its left edge to detach it.

The Toolbar

The *toolbar*, directly under the menu bar in each folder, provides single-click access to frequently used Wave commands. Toolbar buttons can change depending on which folder you're in. The following illustration shows the toolbar for the Messages folder.



In any folder, clicking the left-most toolbar button creates a new item for that folder. For example, in the Call Monitor, clicking the left-most button lets you place a new call:

You can also click the small arrow to the right of that button for a menu that lets you create any new ViewPoint item. The arrow is available in every folder.

The Navigation Pane

Use the *navigation pane*, on the left side of the ViewPoint window, to switch between ViewPoint's folders. Click a folder icon in the navigation pane to open that folder in the ViewPoint main window.

Each folder in the navigation pane gives you access to other related folders, as follows:

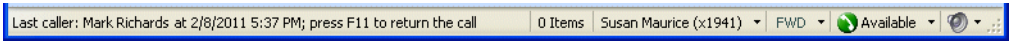
- **Messages.** Displays the Inbox folder. **Folders:** All other Messages folders, including local folders and any folders that other users have shared with you.**Call Monitor.** Displays the Call Monitor. **Folders:** Extensions and (if you are an agent in Contact Center queue) Queue Monitor.
- **Contacts.** Displays the Contacts folder. **Folders:** The Public\Contacts folder.
- **Call Log.** Displays the Call Log.
- **Configuration.** Displays the Greetings folder. **Folders:** Greetings, Personal Statuses, Routing Lists, Groups, Public\Groups.

Customizing the Navigation Pane

To add or remove buttons from the navigation pane, click the small arrow icon in the lower right corner of the pane, then choose **Add or Remove Buttons** from the menu that appears. Check or uncheck button options on the submenu to include or hide them in the pane.

The Status Bar

The *status bar* is located at the bottom of ViewPoint window.

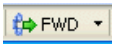


The status bar gives you quick access to the following information:

- **Last caller.** Lists the name (if available) and Caller ID of your last incoming call. You can press F11 to place a call to that number.
- **Number of items.** Number of items in the current folder. For example, if you have 18 contacts, the Contacts folder status bar displays “18 Items.” In any Messages folder, the status bar also indicates the number of Unheard messages.
- **Name and extension.** The name and extension of the user logged on to ViewPoint on this computer.

  Note: If you are a Contact Center agent, clicking this spot on the status bar displays a dropdown list so you can specify if you are making personal or queue calls.

- **Phone.** If you see a Phone pane showing the name of another user, it indicates that user is logged in to your station. While that user is logged in, calls you place using the phone will be subject to that user's dialing restrictions, and logged as coming from that user. To restore the station to yourself, pick up the phone and dial *00.
- **Personal Status.** The current personal status of the user logged on to ViewPoint. Click the personal status button to choose a different personal status. See Chapter 3 for information on personal statuses.
- **Audio output.** You can click these buttons to switch ViewPoint's audio output between your computer speakers and your phone. Audio output includes playing your voice messages. Click the arrow to the right of the button to switch your audio output. If you do not have a sound device, the speaker option may be disabled.
- **Call forwarding.** If the FWD button is bold and has a phone icon to the left, it means you are currently forwarding your calls. Hover your mouse over the button to display the forwarding number. You can also click the arrow to quickly select one of your personal numbers (which you can set via **Tools > Options > My Numbers**) as the forwarding number. Double-click the button to open the Call Forwarding dialog, in which you can change or turn off call forwarding. See "Forwarding calls" on page 9-2.



Working in ViewPoint folders

Wave ViewPoint contains several folders, which appear in the main part of ViewPoint window and give you access to specific Wave functions.

Note: Some folders may not be available to you. Your Wave system administrator controls which folders your ViewPoint program displays.

To open a folder, do one of the following:

- Click its icon in the Navigation pane. See "The Navigation Pane" on page 2-20
- Choose **View > Go To**, then select the folder to display.

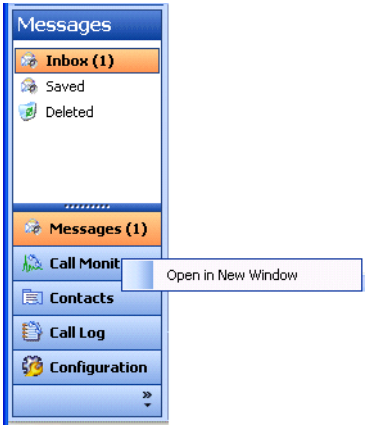
For an overview of each folder, see the following table.

Navigation Pane	Folder	Description
		Messages Hear and manage your voice messages. To call back a message, right-click it and choose **Place Call**. Selecting the Messages folder gives you access to your Inbox, Saved, and Deleted folders.
		Call Monitor Place calls and handle incoming calls (transfer calls, create conference calls, monitor a voice message as it is being left, record a call). Selecting the Call Monitor folder also gives you access to the Extensions folder, your Contacts folders, and (if you are a member of one or more Contact Center queues) the Queue Monitor.
		Call Monitor \ Extensions View all Wave extensions, their personal statuses, and who is on the phone now.
		Call Monitor \ Queue Monitor Contact Center agents only. View and manage agents, and view real-time queue statistics.
		Contacts Manage an online phone book of your own phone contacts. Selecting the Contacts folder also gives you access to the Public\Contacts folder (public contacts are available to all Wave users).
		Call Log View a record of all your incoming or outgoing phone calls. To return a call, right-click it and choose **Place Call**.

Navigation Pane	Folder	Description
		Configuration Selecting the Configuration folder gives you access to the Greetings, Personal Statuses, Routing Lists, Groups, and Public\Groups folders.
		Configuration \ Greetings Record your voice-mail greetings and change the active greeting.
		Configuration \ Personal Statuses Manage personal statuses that communicate your location and availability to your coworkers and control how your incoming calls are handled.
		Configuration \ Routing Lists Set up “follow me” call forwarding (calls ring a series of numbers to find you), and direct calls to Groups or other extensions.
		Configuration \ Groups Define Groups of users and contacts. You can then send voice messages to the Group, and more. (Only you can see the personal Groups that you create—they do not appear in other users’ ViewPoints.)
		Configuration \ Public\Groups Send voice messages to the members of a public Group and more. (Public Groups, which are accessible to all Wave users who have permission to see them, can only be created by your Wave system administrator or a ViewPoint user with permission to do so.)

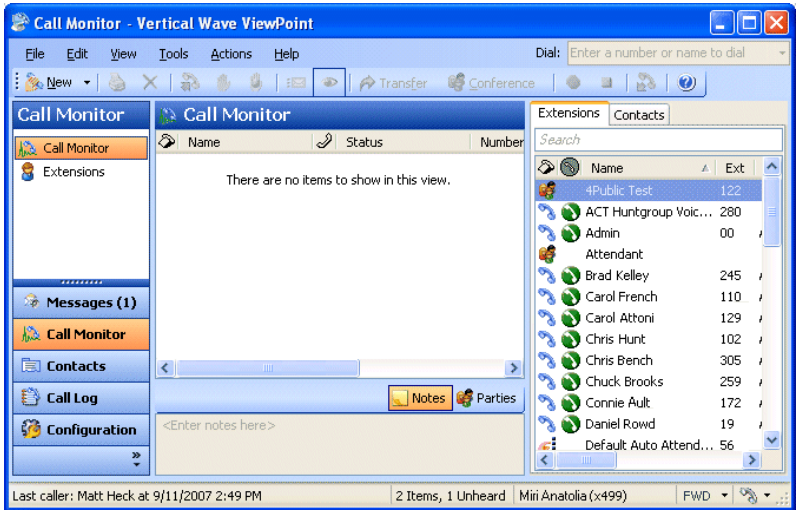
Working with multiple Viewpoint folders at the same time

You can have several folders open at once by opening each folder in its own window. To open a folder in its own window, right-click a folder in the Folders list and choose **Open in New Window** on the shortcut menu.



Adjusting the Phonebook Pane layout in the Call Monitor

The Phonebook pane—shown by default in the Call Monitor—includes the Extensions list and the Contacts folder. You can perform drag-and-drop call handling operations between the pane and the Call Monitor. See “Dragging and dropping items” on page 2-28. With the Extensions list, you can see whether a user is on the phone before placing a call to that user.



With the Phonebook pane open, click the appropriate tab to display the Extensions list or Contacts folder.

To move the Phonebook Pane within the Call Monitor folder, choose **View > PhoneBook Pane**, and then select a location from the sub-menu.

To remove the Phonebook Pane from the Call Monitor folder, choose **View > Phonebook Pane > Off**.

Deleting voice messages and other items

To delete a voice message from your Inbox, select it and then press **Delete**. The voice message moves to your Deleted folder. It will be permanently deleted from the Deleted folder according to the settings defined in **Tools > Options**.

To permanently delete a voice message from your Inbox

1. Select the voice message. To select more than one voice message, press Ctrl and then select them.
2. Press Shift+Delete. A confirmation dialog opens.
3. Do one of the following:
   - Click **Yes** if you want the selected voice message to be permanently removed from your computer.
   - Click No to keep the voice message in your Inbox.

To delete other items

1. In the folder in which the item appears, select the item. To select more than one item, press Ctrl and click each item that you want to delete.
2. Right-click the selected item and choose **Delete** on the shortcut menu. A confirmation dialog opens.
3. When you delete an item that is not a voice message, such as a greeting, the item is permanently and irretrievably removed from your computer. You cannot recover it after you delete it.
4. Click **OK** to permanently delete the item.

Copying and pasting items

Copying a row in any folder places a copy of the item in that row on the clipboard as text. This information can be pasted into other applications, such as a text program.

Choose **Edit > Copy** to place a copy of selected items on your clipboard. Choose **Edit > Paste** to paste the items. Use this method to paste Call Log entries and voice message information into the Problem Report Wizard (See “About the Problem Report Wizard” on page C-1.).

Dragging and dropping items

You can drag and drop one item onto another item to perform actions such as making a call, transferring a call, and adding a call to a conference. You can also move an item to a folder.

For example, if you drag an active call in your Call Monitor onto a user in the Extensions tab of the Phonebook pane, the call transfers to that user. Conversely, you can drag a user from the Phonebook pane to the Call Monitor to call that user.

The following table lists the drag-and-drop actions you can perform within Wave ViewPoint. The From column shows the items you can click and drag. The To column shows the destination items. The remaining columns show the actions that result when you drag and drop an item or use the Shift and Ctrl keys in conjunction with dragging and dropping.

Note: Whenever you can drag an item to the Call Monitor to place a call, you can also drag it to the Dial toolbar field.

DRAG AND DROP ITEMS

From	To	Drag	SHIFT + Drag	CTRL + Drag
Call	**Call**	No action	Opens the Conference dialog	Conferences the calls together
	Extension, Contact, Call Log, Voice Message	Performs a blind transfer	Opens the Transfer dialog	Performs a consultation transfer
		Note: Alt + Drag of a call to an extension transfers the call directly to that extension's voicemail.		
Call Log	**Call**	Conferences the Call Log party with the call	Opens the Conference dialog	
	Empty Call Monitor	Places a call to the Call Log party	Opens the Place Call To dialog	

DRAG AND DROP ITEMS ***(continued)***

From	To	Drag	SHIFT + Drag	CTRL + Drag
Contact	**Call**	Conferences the contact's default number with the call	Opens the Conference dialog	
	Empty Call Monitor	Places a call to the default phone number	Opens the Place Call To dialog	
	Folder	Moves the contact to the folder	Opens the Move Item dialog	Copies the folder
Folder	**Folder**	Moves the folder to another folder	Opens the Move Folder dialog	
	Contact	Moves the folder to the Contacts folder	Opens the Move Folder dialog	
	Voice Message	Moves the folder to the Messages folder	Opens the Move Folder dialog	

DRAG AND DROP ITEMS ***(continued)***

From	To	Drag	SHIFT + Drag	CTRL + Drag
Voice Message	**Call**	Conferences the message sender with the call	Opens the Conference dialog	
	Empty Call Monitor	Places a call to the message Caller ID	Opens the Place Call To dialog	
	Folder	Moves the message to the folder	Opens the Move Item dialog ox	Copies the message
Extension	**Call**	Conferences the call	Opens the Conference dialog	
	Empty Call Monitor	Places the call	Opens the Place Call To dialog	
Text (for example, a phone number you copied from a web page)	**Call Monitor**	Places a call to the number that was dropped	Opens the Place Call To dialog	

Printing items in folders

To print the contents of a folder, choose **File > Print**. When you print a folder that contains several columns, you may need to change the orientation of the page to “landscape” so that all columns that appear in the folder are printed.

Organizing items in folders

The Messages folder contains one folder already created, the Saved folder. When you listen to a voice message on the phone and save it, the message is moved into the Saved folder.

Public folders

Most items you create or see in ViewPoint are stored in private folders so they are not shown when a different user logs into ViewPoint. However, ViewPoint also supports public Contacts and Groups folders that contain items that can seen by all ViewPoint users and edited by those with the proper permission. See “Viewing public folders” on page 2-33.

Customizing columns

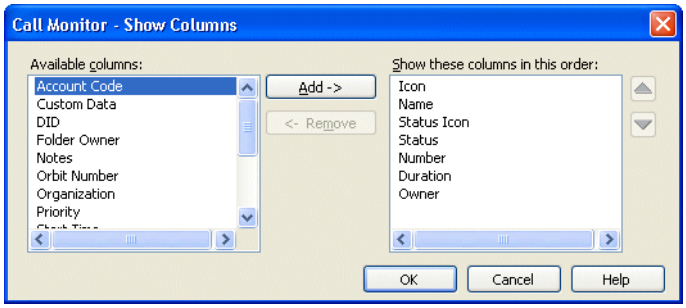
You can choose to show or hide columns in a folder. You can also customize columns in a folder by moving, resizing, and resorting them. The changes you make to columns in a folder are saved when you exit ViewPoint.

Showing, hiding, and reordering columns

For each folder in ViewPoint, you can choose the columns that you want to see in the folder. Note that by default, some folders do not show all of the available columns.

To show, hide, or reorder columns in a ViewPoint folder

1. Choose **View > Show Columns** (or right-click the column header). The Show Columns dialog opens.



2. Do any of the following:
   - To move columns into or out of the folder, select them and click **Add** or **Remove**. You can also drag and drop.
   - To reorder the columns in the folder, select the column in the **Show these columns** list, and click the **Up** and **Down** arrows to move the column up or down in the list.
3. Click **OK** to save your changes.

Note: You can also reorder columns from within the folder by dragging the column headers. Dragging a column off the screen until an X displays removes that column.

Moving columns

To move a column, do either of the following:

- In the folder, click the column header and then drag and drop it to a new location.
- Use the Show Columns dialog to reorder the columns in a folder, as described above.

Resizing columns

To change a column's width, in the folder click and drag the right-hand side of the column header.

Sorting the contents of a column

Click a column header to sort the items in a folder by the information in that column. Click the column header again to sort in the reverse order.

The column in the folder that contains an arrow in its header is the column by which the display is currently sorted. The direction of the arrow indicates the sort order.

Viewing public folders

Public folders contain items that all Wave users can view and use. For example, any user can view a public contact's information or place a call to that contact.

Example: Your company defines its departments as public Groups. All users in the company can view the members of those Groups.

Note: Items in public folders are not generally available for editing or deleting. You must have special permission to edit a public item.

Managing the Deleted folder

The Deleted folder contains voice messages that you have deleted from the Voice Mail folder. Items in the Deleted folder continue to be stored in the limited space that has been allocated to you for your voice files. To regain space for more voice messages or other voice files, empty your Deleted folder.

To view the contents of the Deleted folder, click it in the Folder List.

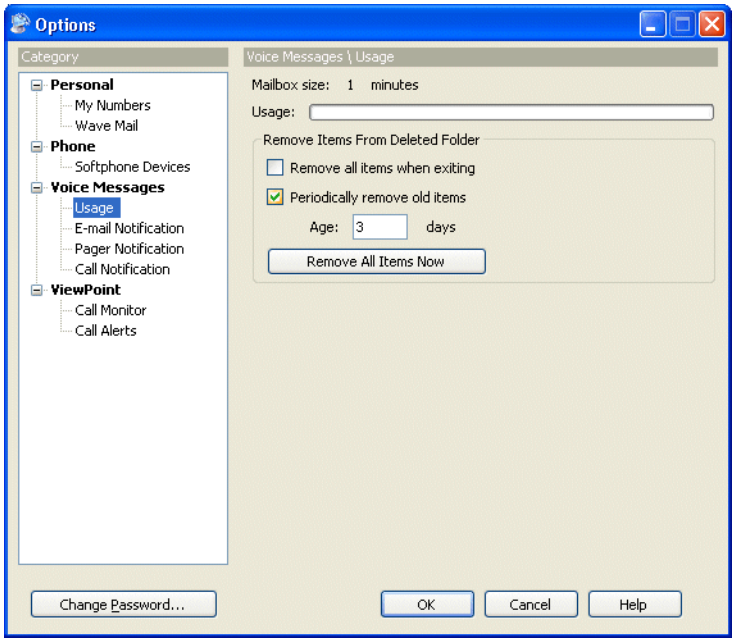
Emptying the Deleted folder

You can delete an item from the Deleted folder just as you would from any folder. When items are deleted from the Deleted folder, they are deleted permanently.

To empty the Deleted folder, choose **Tools > Empty Deleted Folder**.

To empty the Deleted folder automatically

1. Choose **Tools > Options**. The Options dialog opens.
2. Click the Voice Messages \ Usage tab.



3. Choose one of the following options:
    - **Remove all items when exiting**. Deletes all messages in the Deleted folder automatically each time you exit ViewPoint.
    - **Periodically remove old items**. Select this checkbox to remove old items automatically from the Deleted folder.
        - **Age: ___ days**. Enter the number of days an item will remain in the Deleted folder before Wave automatically deletes it.
4. Click **Remove All Items Now** to immediately delete all messages in your Deleted folder when you click **OK** to close the Options dialog.
5. Click **OK**.

Sharing folders

Your Wave system administrator can share other users' folders with you, for example a voice message Inbox shared by all members of a project team. Shared folders appear in your ViewPoint navigation pane, and you can view the folder contents and optionally (depending on your access permission level as assigned by your administrator) edit items in the folder. For example, if another user's Inbox is shared to you and you have full access permission, you can listen to voice messages in that folder, reply to a message, delete it, and so forth.

The following folders can be shared:

- **Call Log**. When shared, you can access the other user's call history.
- **Message**. When shared, you can access the contents of the other user's Inbox, Shared, and/or Deleted folders. Note the following:
    - Voice messages marked Private do not appear in a shared folder.
    - If you have full access permission to another user’s shared Message folder, you can delete voice messages from that folder. If that other user has also shared his or her Deleted folder, the deleted message is moved to that Deleted folder. If that other user has not shared his or her Deleted folder, the deleted message is permanently removed.
    - **Call Monitor**. When shared, you can access the other user's current call activity. Note that Contact Center queue calls are not displayed in a shared Call Monitor. See “Sharing your Call Monitor folder” on page 5-19 for more information.
    - **Contacts**. When shared, you can access and use the other user's contacts.

Using the audio controls

Wave's audio controls make it easy to create recordings and listen to recordings and voice messages. These audio controls appear throughout ViewPoint.

Creating recordings and playing voice messages

You create recordings by speaking into your phone.

	Record	When you are ready to record, pick up your phone, and then click the button. A beep signals that recording has begun.
	Stop	When you are finished recording, you can either hang up or click the button.
	Play	Click the button to listen to the recording or voice message. Click it again to pause playback.

To move forward and backward within the recording or voice message, drag the slider bar:

You can play audio either over your computer speakers or your phone. Choose **Tools > Audio Output** to switch audio output from one to the other. You can also use the button in the status bar. When playing audio over the phone, if your phone is on hook, it will ring to connect you to the audio being played.

Note: When sending audio to your phone, ViewPoint displays a message identifying the station ID being rung.

Using voice message bookmarks

You can set bookmarks in voice messages by dragging the arrows that appear under the slider bar. When you play a message you have bookmarked, only the portion of the file between the bookmarks plays. This capability can be useful when you want to mark the location of an important phone number in a voice message.

Importing and exporting voice files

To import or export a voice file, use the buttons on the recording control.

	Import	You can import a voice file in WAV format to use for any ViewPoint recording (greetings, voice titles, and so on). Wave can import WAV files with a frequency of 8Khz, 11.025 Khz, 22.05 Khz, or 44.1 Khz.
	Export	You can export any of your ViewPoint recordings, including voice messages and recorded conversations, to a WAV or MP3 file on your hard disk.

Importing and exporting Wave items

See the following topics for more about importing and exporting Wave items:

- **Contacts.** See “Importing and exporting contacts” on page 2-38.
- **ViewPoint recordings (voice messages and call recordings).** See page “Exporting ViewPoint recordings” on page 2-41.
- **Archived call recordings.** See “Acting on archived call recordings” on page A-11.

Importing and exporting contacts

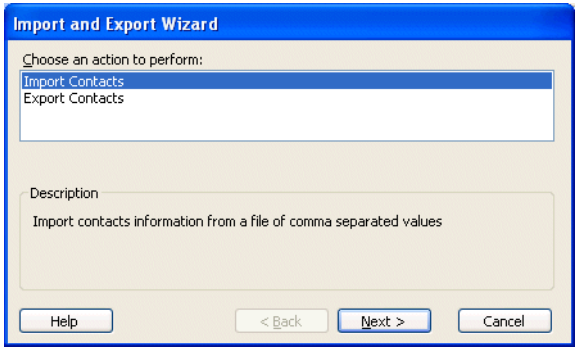
You can import contacts into Wave:

- From a CSV file generated via Wave
- From a CSV file generated from another contact manager such as Microsoft Outlook

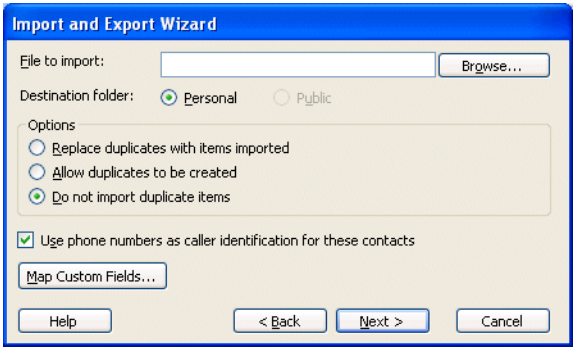
You can export contacts from Wave to a CSV file that you can import into another Wave ViewPoint, Outlook, GoldMine, FrontOffice 2000, Act!, or other contact management software.

To import contacts from a CSV file

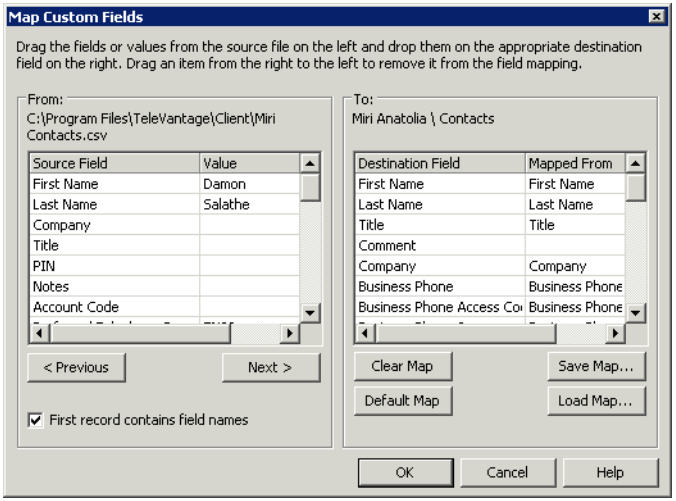
1. Choose **File > Import and Export**. The Import and Export Wizard opens.



2. Select **Import Contacts**, and then click **Next**.



3. In **File to Import**, click **Browse** and select the CSV file that you want to import.
4. In **Destination folder**, select the Wave Contact folder into which you want to import the contacts in the CSV file.
5. Under **Options**, select one of the following:
   - **Replace duplicates with items imported.** If Wave finds a duplicate contact in the CSV file, the contact from the file will replace the existing Wave contact.
   - **Allow duplicates to be created.** If Wave finds a duplicate contact in the CSV file, it will import all contacts, even those that are duplicates of Wave contacts.
   - **Do not import duplicate items.** If Wave finds duplicate contacts in the CSV file, it will not import them.
6. Select **Use phone numbers as caller identification for these contacts** to add the imported contacts' phone numbers to Wave's list of Caller ID numbers so that contacts can be identified when they call. For more information, see "Teaching Wave to recognize your contacts" on page 10-8.
7. If you are importing a CSV file that was created by Wave or Outlook, go to step 10.
8. If you are importing contacts from another application and have not previously mapped the fields, click **Map Custom Fields**. The Map Custom Fields dialog opens using the default map, showing the first contact record to be imported, and how the existing fields will be mapped to Wave fields.



9. If you have saved a different map and want to use it, click **Load Map** and select it. Otherwise, map the fields manually as follows:

   - Check **First record contains field names** at the bottom of the dialog if the CSV file's first record consists of the names of fields. Then drag fields or values from the left pane (the CSV file) to the fields in the right pane (Wave contacts) in which you want the values to appear. Drag unwanted field mapping from the right pane to the left pane to clear them.
   - Click **Previous** or **Next** to view other records in the CSV file to see how they will map.
   - Click **Clear Map** to remove all mapping from the right pane.
   - Click **Default Map** to restore the default mapping.
   - Click **Save Map** to save the current mapping to a new file (this can be useful if you regularly import contacts from several different sources). If you do not click **Save Map**, the default map is saved when you click **OK**.

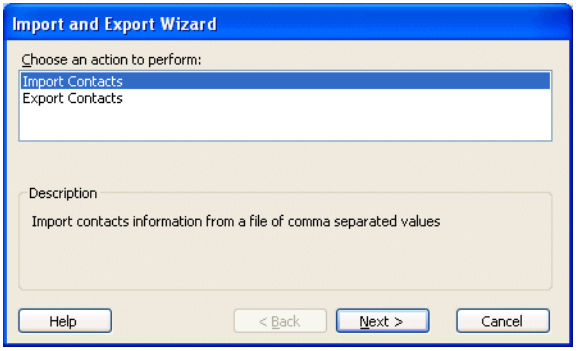
   When you are finished mapping fields, click **OK**. Any changes to the default or custom map are saved for future importing.

10. Click **Next** in the Import and Export Wizard, and then click **Finish**. The contacts in the CSV file are imported.

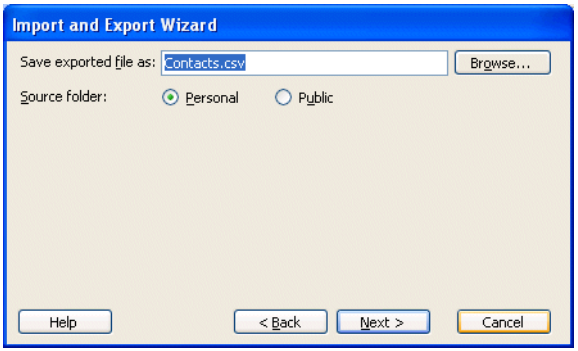
    Note: When text is imported from a CSV file, a comma in the text breaks the text between fields unless the text is within quotation marks.

To export contacts to a CSV file

1. Choose **File > Import and Export**. The Import and Export Wizard opens.



2. Under **Choose an action to perform,** select **Export Contacts**, and then click **Next**.



3. In **Save exported file as,** browse to the folder in which you want to save the CSV file.
4. In **Source folder**, choose the Contacts file that you want to export, and then click **Next**.
5. Click **Finish**. The CSV file is exported.

Exporting ViewPoint recordings

You can export voice messages and call recordings in WAV or MP3 format.

1. In the ViewPoint Messages folder, select the voice message or call recording.
2. Click the **Export** audio button.
3. Specify the target location.
4. Select WAV or MP3 from the **Save as type** drop-down list.
5. Click **Save**.

Note: If a call recording has already been archived, you must use the Archived Recording Browser to export it. See Appendix A.

Using Personal Statuses

CHAPTER CONTENTS

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Changing the personal status of another user 3-11

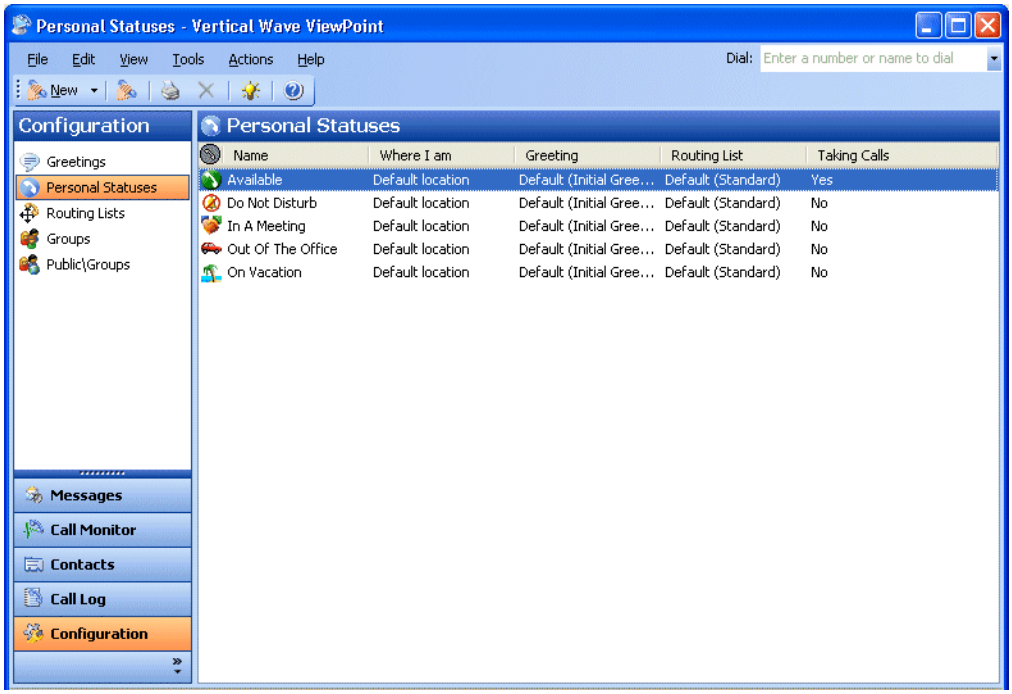
About personal statuses

Your personal status appears with your name in other ViewPoint users' Extensions lists, letting your colleagues know where you are and what you are doing. For example, setting your personal status to On Vacation alerts other users not to call you on a critical issue.

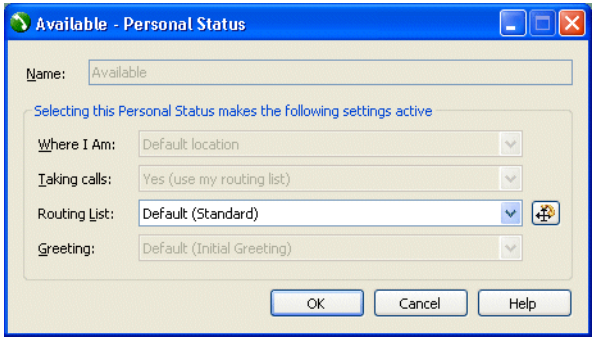
Also, you can also use personal status as a quick way to change your call handling. For example, the Do Not Disturb status sends your incoming calls directly to voicemail without ringing your phone.

Note: To change your own or another person's personal status, you must have permission to do so. If you cannot change your own or another user's personal status according to the instructions in this chapter, see your Wave system administrator.

To view the available personal statuses, click **Configuration** in the navigation bar, and then click **Personal Statuses**:



Double-click a personal status to view its properties.



A personal status consists of the following:

- **A personal status icon and a name**, such as Available. These appear next to your name in the Extensions list, so that other Wave users can see at a glance whether you are in the office and available or not. Likewise, by looking at the Extensions list you can see the personal status of other users.
- **A collection of preferences that determines how your incoming calls are handled**. Each personal status consists of the following call handling preferences:
  - **Where I Am**. Identifies the phone to which your incoming calls will be sent when the personal status is active. The default Where I Am location is your phone, or your forwarding number if your calls are forwarded.
  - **Taking calls**. Specifies whether calls ring through to your phone or not when the personal status is active.
  - **Queue calls**. For Contact Center agents only, specifies whether queue calls are sent to your phone when the personal status is active. For more about using personal statuses as a Contact Center agent, see Chapter 5 in the *Wave Contact Center Administrator Guide*.
  - **Routing List**. Specifies the routing list that Wave uses to process calls when the personal status is active.
  - **Greeting**. Specifies the recording that Wave plays to callers when they reach your voicemail (or any other final action of your routing list) when the personal status is active.

  Depending on the personal status, you can modify some of these preferences. See “Modifying a personal status” on page 3-8.

Available personal statuses

Five personal statuses are available to all users. Three additional personal statuses are available only to Contact Center agents.

Personal statuses (for all users)

The following five personal statuses are available for all users.

Icon	Status	Description
	Available	Lets people know that you are available to take calls. All calls ring through to you according to your current call forwarding, routing list, and other settings. If you are an agent in a Contact Center queue, you can use this status to make yourself available for both queue and non-queue calls. For additional Contact Center agent personal statuses, see the next table.
	Do Not Disturb	Lets people know that you are not taking calls. **No calls ring your phone.** Calls are sent straight to the “unanswered” final action of your routing list (usually your voicemail). **Note:** You can create a call rule that overrides the Do Not Disturb personal status by allowing calls from specific people to ring your phone. See Chapter 11.
	In a Meeting	These three personal statuses let people know where you are when you are away from your desk. Like Do Not Disturb, these personal statuses send your calls directly to the “unanswered” final action of your routing list (usually your voicemail) without ringing your phone. You can change that default behavior with these statuses.
	Out of the Office	
	On Vacation	

Personal statuses (for Contact Center queue agents)

In addition to the personal statuses described above, the personal statuses shown in the following table are available if you are an agent in one or more Contact Center queues. For information about working as an agent in a Contact Center queue, see the *Wave Contact Center Administrator Guide*.

Icon	Status	Description
	Available (Queue Only)	This status or the Available status makes you available to take calls. When you select this status, the queue begins sending calls to you. With this status, **only queue calls ring your phone**. Non-queue calls are sent directly to your voicemail. To have all your calls ring your phone, make yourself available by selecting the Available status (see the previous table). You can also select this status by picking up the phone and pressing ***51**.

Icon	Status	Description
	Available (Non-Queue)	This status makes you unavailable at the end of your shift. When you select this status, the queue stops sending calls to you. With this status, **non-queue calls still ring your phone**. To prevent all calls from ringing your phone, make yourself unavailable by selecting Do Not Disturb. You can also select this status by picking up the phone and pressing ***52**.
	On Break	This status puts you on a break during your shift. While this status is selected, the queue does not send calls to you. When you take a break, be sure to use the On Break status rather than Available (Non-Queue), which ends your shift. Using On Break when you take a break will ensure the integrity of Contact Center statistics. You can also select this status by picking up the phone and pressing ***53**.

If you are an agent in a Contact Center queue, note the following:

- You can make yourself available for queue calls by selecting either Available or Available (Queue Only).
- You can make yourself unavailable for queue calls by selecting any status other than Available (Non-Queue), Available (Queue Only), or On Break.

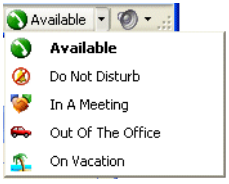
Selecting a personal status

You can select a personal status using ViewPoint or the phone.

Selecting a personal status in Viewpoint

Use any of the following methods to select a personal status in ViewPoint:

- Click the Personal Status button on the status bar, and then select a personal status.



- Choose **Tools > Personal Status** and then select a personal status.
- In the Personal Statuses folder, select a personal status and then choose **Actions > Set as Active**.

Selecting a personal status using your phone

You can select a personal status on the phone in the following ways:

- Log on and press **6 1**. You can select the Available personal status quickly by picking up the phone and pressing ***50**.
- For Contact Center agent statuses, pick up your phone and press ***51** through ***53**. Use these quick commands to begin and end your shift and to go on break. See “Starting and ending your shift, and taking breaks” in Chapter 5 in the *Wave Contact Center Administrator Guide*.

Modifying a personal status

You can modify personal statuses to reflect your changing availability and location. For example, if you are often away from your desk attending meetings, you can modify the In a Meeting personal status to send your callers directly to voicemail.

Not all preferences are modifiable:

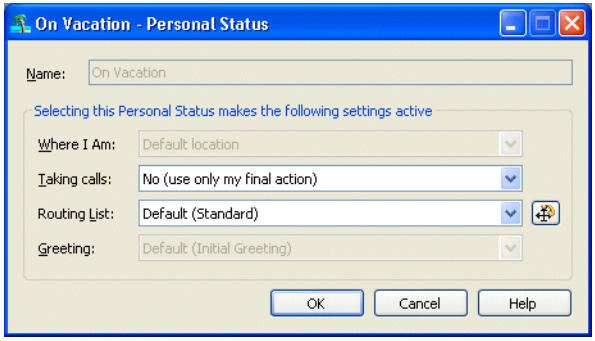
- **Where I Am**. Cannot be modified for any personal status. The default **Where I Am** location is your phone or your call forwarding number if your calls are being forwarded.
- **Taking Calls**. Can be modified for In A Meeting, Out Of The Office, or On Vacation.
- **Greeting**. Cannot be modified for any personal status. Your default greeting is always used.
- **Routing List**. Can be modified for all personal statuses.

If you are an agent in a Contact Center queue:

- **Queue calls**. Cannot be modified for any personal status. **Queue Calls** is always set to Yes for Available (Queue Only) and Available (Non-Queue), and to No for all other statuses.

To modify a personal status

1. In the Personal Statuses folder, double-click the personal status. The Personal Status dialog box opens.



2. Specify how you want your calls handled while this personal status is selected using the following drop-down lists. For most call handling preferences, you can select either a specific item or Default. Selecting Default uses the item that is your current personal status default, which is shown in parentheses. “Setting personal status defaults” on page 3-10 for more information.

- **Where I am**. *Modifying this preference for a personal status is not supported in this version*. This preference identifies the phone to which your incoming calls will be sent when this personal status is active. The default Where I Am location is your phone, or your forwarding number if your calls are forwarded.
- **Taking calls**. Specifies whether you want calls to ring through to your phone or not when this personal status is active.
  - **Yes (use my routing list)**. Incoming calls follow your active routing list, which usually includes ringing your phone.
  - **No (use only my final action)**. Incoming calls are sent directly to the final action on your active routing list, which by default is your voicemail.

  Note: You can modify this setting only for the personal statuses In a Meeting, Out of the Office, and On Vacation.
- **Queue calls**. *Modifying this preference for a personal status is not supported in this version*. This preference is displayed only if you are an agent in a Contact Center queue. Specifies whether queue calls are sent to your phone when this personal status is active.
  - **Yes.** Marks you as available to take queue calls, and while this personal status is active you can receive calls from all queues for which you are signed in.
  - **No.** Marks you as not available to take queue calls.

  Note: **Queue calls** is always set to Yes for Available (Queue Only) and Available (Non-Queue), and to No for all other statuses.
- **Routing List**. Select the routing list that your calls will follow when this personal status is active. To create a new routing list, click , or press ALT+click to edit the selected routing list. For more about routing lists, see “Using routing lists” on page 9-5.
- **Greeting**. *Modifying this preference for a personal status is not supported in this version.* For more about greetings, see “Managing voicemail greetings” on page 7-23.

3. Click **OK** to save your changes.

Using personal status defaults

Specifying a default personal status greeting and routing list

When you select a personal status with a greeting or routing list preference, it makes that greeting or routing list active. When you are done using that personal status, you probably want your active greeting and routing list to revert to what they were before they were made active by the personal status.

Personal status defaults are a way of accomplishing this. Personal status defaults specify the greeting and the routing list that become active when you select a personal status that has no greeting or routing list preference.

You can specify only one default personal status greeting and one default routing list at a time. When you select a personal status with no greeting preference, the personal status default greeting becomes active. When you select a personal status with no routing list preference, the personal status default preference becomes active.

Example: You set your "Everyday" greeting to be your personal status default, because this is the greeting you normally use. Several times during the day you change your active greeting by selecting the personal status In a Meeting, which applies your custom "Be Back Soon" greeting. When you return from the meeting and select the personal status Available (or any other personal status) your personal status defaults are restored, so your "Everyday" greeting becomes active again.

You can change the greeting and the routing list that are your personal status defaults at any time. See "Setting personal status defaults" on page 9-13.

Setting personal status defaults

- To set your personal status default greeting, edit the greeting and select the **Default personal status greeting** checkbox. See "Recording a new greeting" on page 7-26 for details.

  Note: When you make a greeting active using the telephone commands, that greeting also becomes your personal status default greeting.

- To set your default routing list, edit the routing list and select the **Use this routing list as the default for incoming calls** checkbox. See "Creating a routing list using the Routing List Editor" on page 9-11 for details.

To set a personal status preference back to the default setting

Perform these steps to set a personal status preference back to the default setting

1. Edit the personal status. See “Modifying a personal status” on page 3-8.
2. For the **Routing List** preference, select Default from the drop-down list. The Default entry displays the name of the current default item in parentheses, for example “Default (Standard)”.
3. Click **OK**.

Changing the personal status of another user

You can change the personal status of another Wave user if you know that user’s password (or you can do it without entering a password if you have the appropriate permission). This feature is useful when a user wants to change his or her personal status but does not want to or cannot log on to Wave. For example, an administrative assistant can change the personal status for the boss, or the user who is acting as the Operator user can change the Operator’s personal status without logging on as the Operator user.

To change another user’s personal status in ViewPoint

1. In the Extensions list, right-click the user.
2. Choose **Apply Personal Status** and click a personal status.
3. If you do not have the appropriate permission, you will be prompted for that user's password:

Enter the user’s password and click **OK**.

Using the Extensions List

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Viewing Wave extensions 4-1
Placing calls to an extension 4-4
Using Wave IMpulse for instant messaging 4-4

Viewing Wave extensions

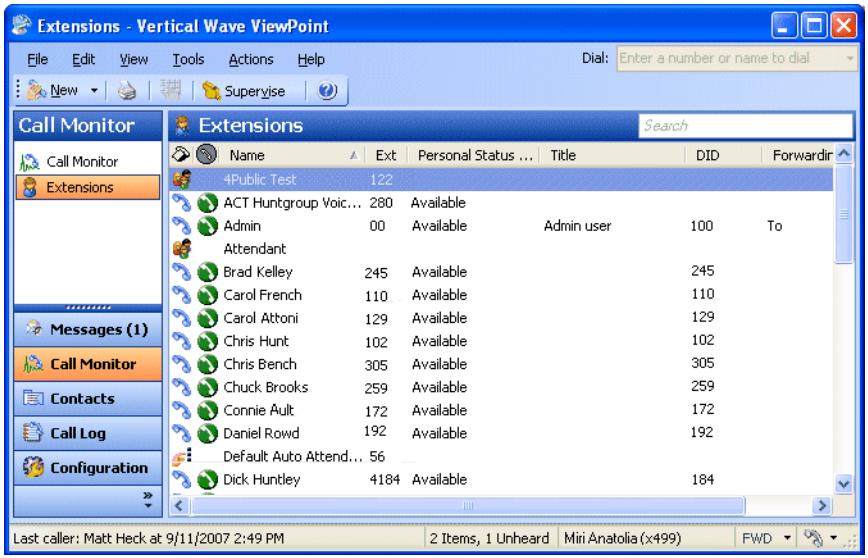
You can see all Wave extensions, along with information about the current status of each extension, in the Extensions list. You can use the Extensions list to quickly place calls to other Wave extensions or to change another user's personal status if you have permission to do so.

You can display the Extensions list in the Call Monitor for quick access, including drag-and-drop calling. See "Adjusting the Phonebook Pane layout in the Call Monitor" on page 2-26.

A glance at the Extensions list can tell you:

- A user's extension number
- Whether a user is currently on a call
- A user's current personal status
- Whether a user has call forwarding turned on, and the location to which the calls are forwarded
- The extensions of your office's auto attendants and Contact Center queues.

The Extensions list automatically updates in real time.



Note: From the Extensions list you can change another user's personal status if you know that user's password, or have the proper permission. For instructions, see "Changing the personal status of another user" on page 3-11.

Searching the Extensions list

To find someone quickly, you can type their first or last name (fully or partially) in the Search field. The Extensions list displays all items whose first or last name begins with the entered text.

Extensions list tabs

The Extensions list can optionally contain tabs that display related groups of extensions. Tabs are located at the bottom of the Extensions list. Click each tab to view its contents.

- **All tab.** This tab displays all Wave extensions. Note that your Wave system may be configured to not show this tab.
- **Group tabs.** The Extensions list can optionally display a tab for each public ViewPoint Group of which you are a member, and a tab for any personal ViewPoint Groups that you created. Click a Group tab to see the extensions within that Group. See "Using ViewPoint Groups" on page 10-17.
- **Queue tabs.** If you are an agent in a Contact Center queue, the Extensions list contains a tab for each queue. Click the tab to see the agents who are members of that queue, as well as all of the current calls for the queue. An asterisk (*) on the queue tab indicates that you are signed out for that queue. For details about participating in a queue, see Chapter 5 in the *Wave Contact Center Administrator Guide*.

Showing, hiding, and reordering Extensions list tabs

To show or hide individual tabs, as well as choose their order, do the following:

1. In the Extensions list, choose **View > Show Tabs**. (You can also right-click anywhere in the the Extensions list and then choose **Show Tabs**.)
2. Select a tab name and click **Add** or **Remove** to set up the **Show these tabs in this order** list. Use the up and down arrow buttons to arrange the order of tabs in the list.
3. Click **OK**. The specified tabs are displayed at the bottom of the Extensions list.

Extensions list columns

Some Extensions list columns are hidden by default. Press **F1** for Help to see a complete list of columns with explanations. To show or hide columns, see "Customizing columns" on page 2-31.

Placing calls to an extension

To place a call to an extension, double-click the extension. If your phone is on hook, it rings to connect you to the call being placed.

Using Wave IMpulse for instant messaging

Wave IMpulse supports simple, secure, user-to-user instant messaging in ViewPoint. With instant messaging you can initiate a real-time typed conversation between yourself and another user.

You can:

- Send and receive instant messages with other users.
- Send and receive instant messages with users in Wave organizations other than the one to which you belong.
- Initiate an instant messaging conference.

Each of these features requires that you have the appropriate Wave permissions assigned by your Wave administrator. Ask your Wave administrator if you are configured to use these features. Also, before your instant message can be delivered to another user, that user must be running ViewPoint and must also have the appropriate Wave permissions assigned.

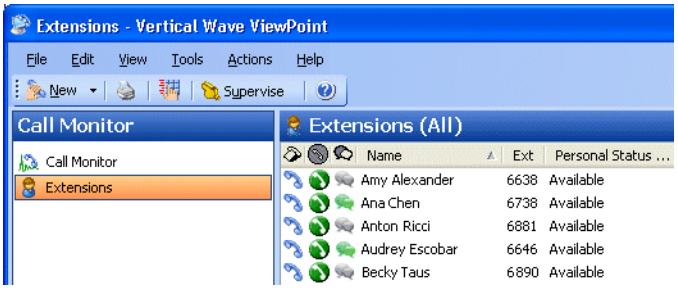
Sending an instant message to another user

To send an instant message to another user, right-click the user in the Extensions view and then click **Send Instant Message**.

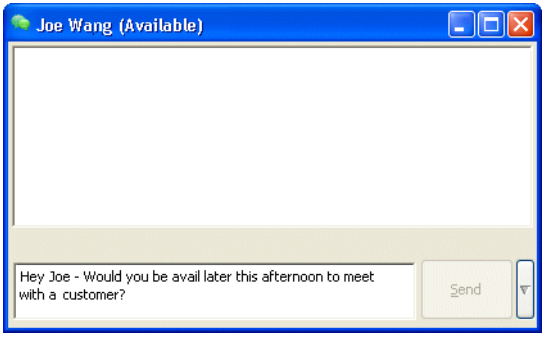
If that user is not currently online, the following message is displayed:

> "Joe Wang seems to be offline. Message you send will be delivered when Joe Wang comes online."

You can recognize whether users are online or not by the Presence icon next to their name in the Extensions view. In the following example, Ana Chen and Audrey Escobar are online

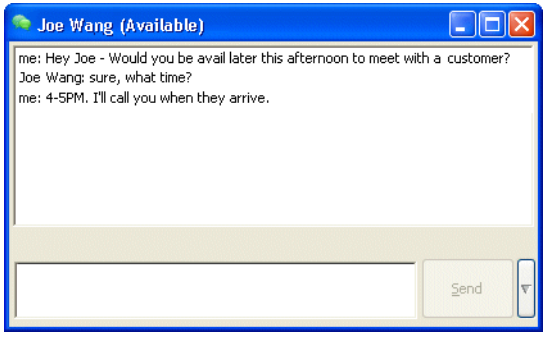


Type your instant message in the window that opens:



Click **Send** to send your instant message. If that user is running ViewPoint and has the appropriate Wave permissions assigned when you click **Send**, the message window pops open in the receiving user's ViewPoint, allowing him or her to respond.

As your conversation progresses, all of the messages and replies are displayed at the top of the window:



If you send or receive a message and there is no new interaction from the other party within a minute, the date and time of the last message is displayed in the window, for example “Sent at 5:14 PM on Thursday."

Receiving an instant message from another user

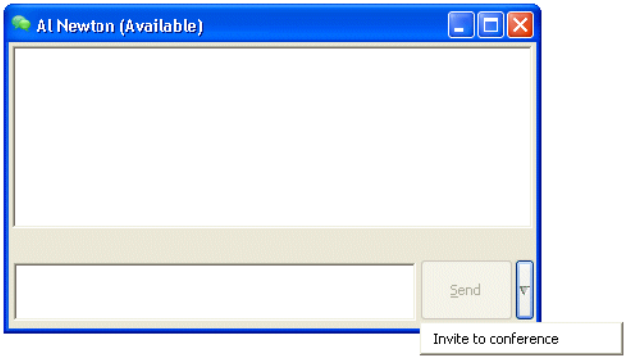
When you receive an instant message from another user, the instant message window displaying the message pops up if it is not already open. Similarly, when you log onto ViewPoint, the message window pops open displaying any instant messages you received while you were not logged on.

Inviting users to an instant messaging conference

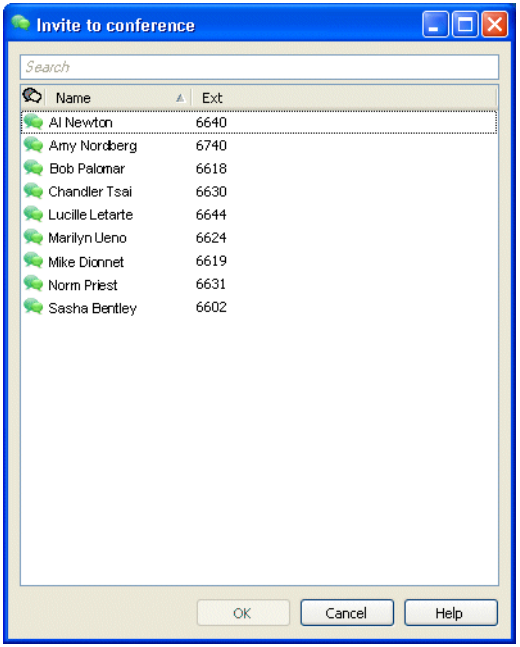
You can create an instant messaging conference before you start sending messages, or add other users as you go along.

To create an instant messaging conference

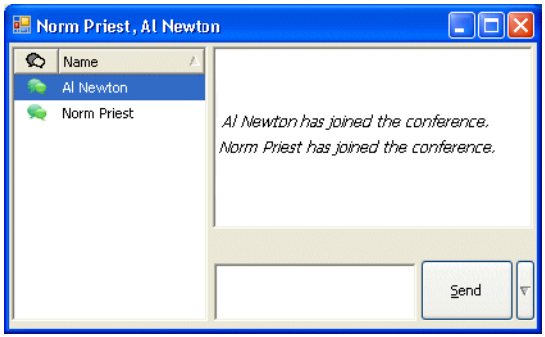
1. Right-click the name of one of the participants in the Extensions view and then click **Send Instant Message**.
2. In the window that opens, click the arrow button located to the right of the **Send** button, and then click **Invite to Conference**.



3. The Invite to Conference dialog opens listing the users who are currently available.



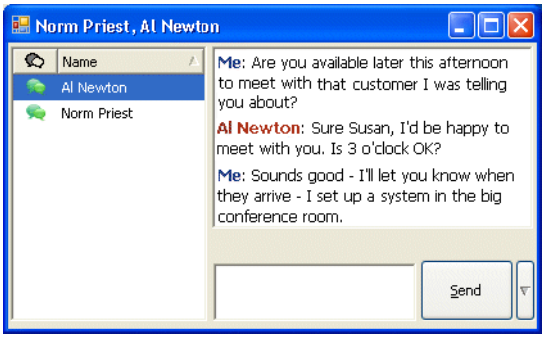
4. Select the names of the conference participants to invite and then click **OK**.



The invitees are automatically added to the conference.

Participating in a conference

Any of the conference participants can send messages that will be displayed in each user's ViewPoint.



Any participant can invite additional participants to join the conference by following the steps listed above.

To exit a conference, click the Close button at the top of the window.

Note: In this version, selecting or deselecting one or more participant names in the left pane has no effect. In a future version, you will be able to use this area to remove a participant from the conference, send a private message to a participant, and so forth.

Receiving and Handling Calls in ViewPoint

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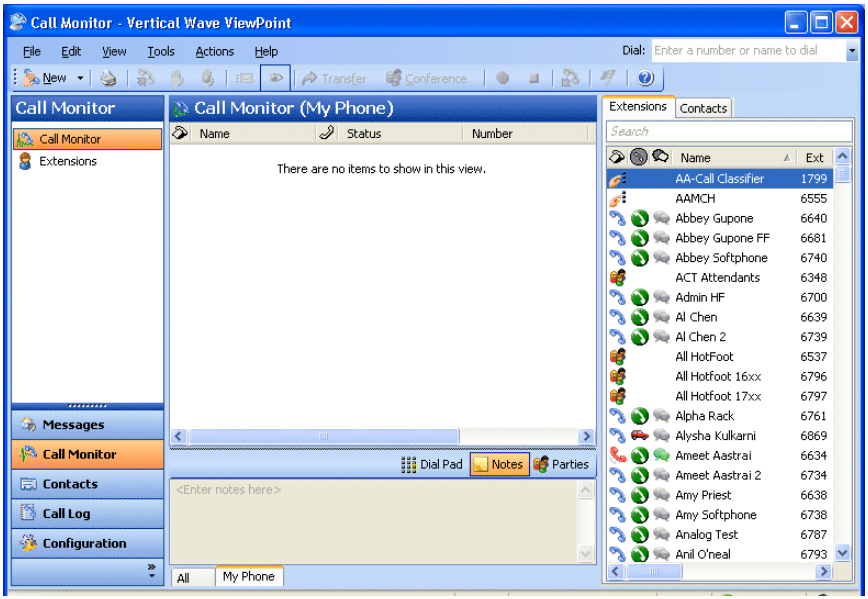
Using the Call Monitor folder

In the Wave ViewPoint, the Call Monitor folder is the visual counterpart to your phone. The Call Monitor lets you see all your incoming calls and any outgoing calls at once, often with the callers identified by name. You must have a phone associated with ViewPoint in order to use most Call Monitor features.

Note: Calls made or answered via an Outside Line feature button on a phone do not appear in the ViewPoint Call Monitor.

The following graphic illustrates the ViewPoint Call Monitor.



In the Call Monitor folder you can:

- See who is calling you and take the call or send it to voicemail
- Click calls to transfer them, put them on hold, send them to voicemail, or perform other actions
- Move among multiple calls on hold with a click of the mouse
- Record calls
- Conference calls (including creating or starting a conference)

Each row in the Call Monitor folder is an item that contains information about one call, or one party in a call. Conference calls appear in a special Conference pane that shows the parties other than yourself.

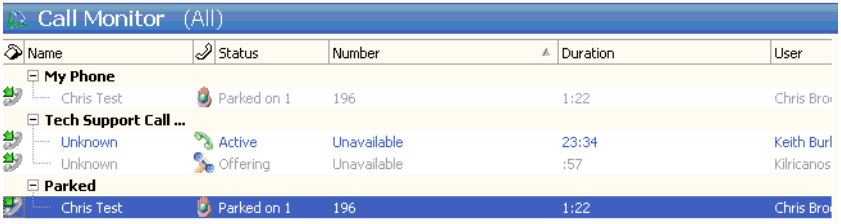
For an explanation of Call Monitor folder columns, press **F1** for online Help. For information about changing the Call Monitor folder columns that are displayed, see “Customizing columns” on page 12-20.

Call Monitor folder tabs

For most people, the Call Monitor folder contains two tabs, called My Phone and All. You can optionally display other tabs that group related calls. Click each tab to view the related call activity at your phone.

- **My Phone tab.** This tab always appears in your Call Monitor folder and displays all calls to or from your phone. This includes calls that are forwarded to your extension (in this case, the called party who forwarded the call is identified in the Owner column), and calls to your DID number if you have one.
- **Parked tab.** The Parked tab shows all current parked calls.
- **Queue tab.** If you are an agent in a Contact Center queue, all the current calls for the queue appear on a separate tab labeled with the queue name. An asterisk (*) on the queue tab indicates that you are signed out for that queue. For details about participating in a queue, see Chapter 5 in the *Wave Contact Center Administrator Guide*.
- **All tab.** The All tab shows all of the following that apply to you:
  - All calls to and from your phone.
  - If you are an agent in a Contact Center queue: All queue calls for any queue that you are currently signed into. (If you are not signed into a queue, that queue's calls do not appear in your All tab, but they do appear on that queue's Queue tab.)
  - All calls from any other users' Call Monitors that have been shared with you.

Calls on the All tab are grouped under headers that correspond to the names of your other Call Monitor tabs, as in the following example.

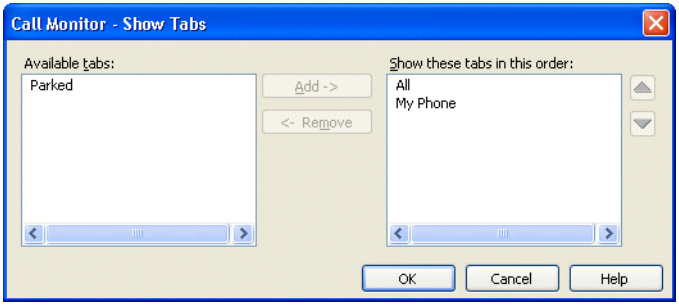


Note that a call may appear multiple times in the All tab, for example, under both the My Phone header and the Parked header. You can select any appearance of a call to perform commands on it.

Showing, hiding, and reordering Call Monitor tabs

To show or hide individual Call Monitor tabs, as well as choose their order, do the following:

1. Choose **View > Show Tabs**. (You can also right-click the Call Monitor column headers or tabs.)



2. Click **All** to select all tabs, or select a tab name and click **Add** or **Remove** to show or hide it. Use the up and down arrow buttons to arrange the order in which the tabs are displayed.
3. Click **OK**.

Using the My Phone tab to handle calls

The My Phone tab appears if you have other tabs showing. After you answer a call, the Call Monitor automatically switches to the My Phone tab. It is the only tab from which you can perform call-handling commands on a call. If you select an active call in another tab, the call-handling commands are unavailable.

Call Monitor folder panes

The Call Monitor folder contains the following panes that you can hide or show:

- **Phonebook Pane**. Shows the Extensions list and the Contacts folder and enables drag-and-drop call handling. See “Adjusting the Phonebook Pane layout in the Call Monitor” on page 2-26 and “Dragging and dropping items” on page 2-28.
- **Notes Pane**. Enables you to type and add call notes. See “Adding notes to a call” on page 5-13.
- **Parties pane**. Shows the parties in a conference call other than yourself.
- **ViewPoint Softphone Dial Pad**. Available if you are using the ViewPoint as your primary or secondary phone. See “Using the ViewPoint Softphone” on page 2-6 for an overview of the ViewPoint Softphone.

Call Monitor folder columns

The Call Monitor folder contains several columns that show detailed information about a call, such as Trunk Name and Target Station. Some of the columns are hidden by default. For an explanation of the columns, press **F1** in the Call Monitor folder for its online Help. For instructions on hiding and showing columns, see “Customizing columns” on page 12-20.

Viewing a custom data column in the Call Monitor

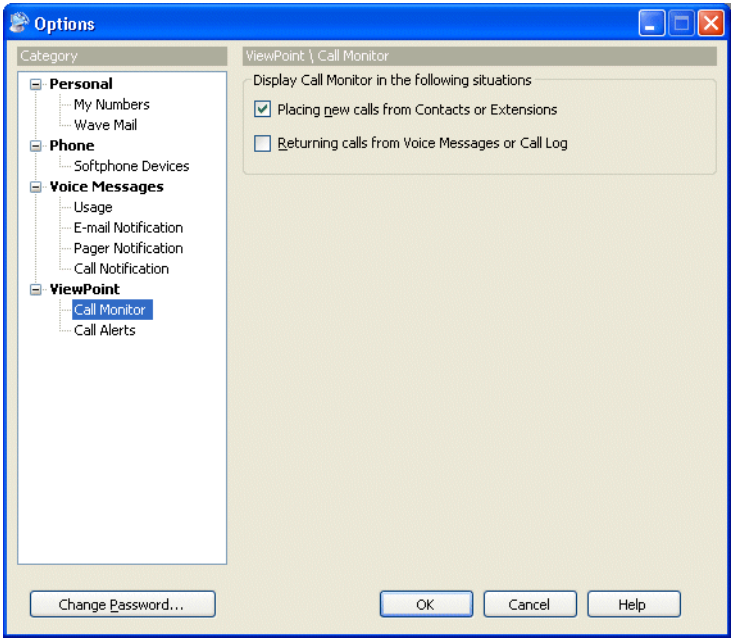
If your Wave system is configured to display custom data (for example, a caller’s account number) in the Call Monitor, the custom data appears in one or more columns. You can view the available columns in the Show Columns dialog. You can hide and show custom data columns the same way you can hide and show normal columns (see “Customizing columns” on page 2-31.) Contact your Wave system administrator to see if any custom data columns are available in your Call Monitor folder.

Displaying the Call Monitor folder automatically

Wave can open the Call Monitor folder automatically when you place or return calla form some ViewPoint folders. When the Call Monitor folder opens automatically, it appears in front of all other open windows on your computer.

To display the Call Monitor folder automatically

1. Choose **Tools > Options**. The Options dialog opens.
2. Click the ViewPoint \ Call Monitor tab.



3. Under **Display Call Monitor in the following situations**, select one or both of the following checkboxes:
   - **Placing new calls from Contacts or Extensions.** The Call Monitor folder opens each time you place a call from the Contacts or Extensions folder.
   - **Returning calls from Voice Messages or Call Log**. the Call Monitor folder opens each time you return a call from a voice message or Call Log entry.

4. To display the Call Monitor folder automatically on incoming calls, click the ViewPoint \ Call Alerts tab and check **Display the Call Monitor**.
5. Click **OK**.

Selecting and acting on a call in the Call Monitor

Click a call in the Call Monitor folder to select it. After it is selected, you can choose commands to apply to that call.

To use a command on a call in the Call Monitor folder, do one of the following actions:

- Right-click the call and choose a command on the shortcut menu. This option is often the fastest way of choosing a command, but it may be difficult to do so during times when phone traffic is heavy. This is due to the fact that calls change position in the Call Monitor folder as new calls arrive and transferred calls leave the Call Monitor folder.
- Click a button on the toolbar.
- Choose a command from the **Actions** menu.
- Press **Enter**. This puts the selected call on hold, or retrieves it if it is already on hold.

Important: Do not use the ViewPoint Call Monitor to select and act on a call to a virtual extension—use the phone commands (as described in the *Wave Phone User Guide*) to control these calls. A virtual extension number can be assigned to a user who does not need a physical phone, for example because the user works on the road using a cell phone. Ask your system administrator if there are any virtual extensions assigned on your system.

Automatically displaying account code information for contacts

On an incoming call from a ViewPoint contact, Wave automatically displays the contact's account code information (if any) along with the call in the ViewPoint Call Monitor. If you do not observe this behavior, ask your Wave administrator if this feature has been disabled on your system.

Call ownership

In the Call Monitor you can perform call-handling commands only on calls that you own. You own a call if you are the one who answered it. If you select a call that you do not own, the call-handling commands are unavailable.

Examples of calls that you can see, but that you do not own, include calls in a Queue tab that are being handled by another agent, or calls in a shared Call Monitor tab that are being handled by the sharing user.

To determine who owns a call, look at the name in the Owner column.

Double-clicking calls

Double-clicking in the Call Monitor folder has the following effects:

- Double-clicking an active call puts it on hold.
- Double-clicking any other type of call takes the call (connects you to the caller). This includes incoming calls, calls on hold, parked calls, and calls to which you are listening while the caller leaves a message.

Commands while a call is ringing

While calls are ringing at your phone, the Call Monitor folder displays “Incoming Call.” If Wave can identify the caller, the item in the Call Monitor folder also displays the caller’s phone number and name, which enables you to screen your calls. (See “Teaching Wave to recognize your contacts” on page 10-8.) While calls are ringing, you can perform the following actions:

- Take the call
- Send the call to voicemail
- “Grab and hold” the call (put the call on hold without talking to the caller first)

Taking the call

If you are already on another call, select the incoming call and choose **Actions > Take Call**. Your current call is put on hold. You can easily move among multiple calls by choosing **Take Call** again.

When you use **Take Call** in the Call Monitor folder, you can play the caller’s name over your speakers by choosing **Actions > Announce Caller**.

Sending the call to voicemail

Select the call, and then choose **Actions > Take Message**. The call is sent to your voicemail.

Note: Contact center agents cannot perform this command on an incoming queue call.

Screening a voice message as it is being left

You can listen to a voice message as the caller is leaving it and pick up the call if needed. To do so:

1. Select the call while it is ringing or while the caller is leaving a message.
2. Choose **Actions > Screen Message**.
3. Pick up your phone and listen to the message as it is being left. This is a one-way connection. The caller cannot hear you.
4. To interrupt the message and take the call, choose **Actions > Take Call**. You are connected to the caller.

You can also listen to a voice message as it is being left via the phone.

Commands while you're on a call

Once you are on an active call, you can perform actions on that call, including the following:

- Putting a call on hold. See page 5-10.
- Transferring a call. See page 5-11.
- Adding notes to a call. See page 5-13.
- Sending an email message about a call. See page 5-13.
- Recording a call. See page 5-13.
- Including the call as part of a conference call. See page 5-12 for steps to transfer a call and then conference all parties together. (Conferencing is described in more detail in Chapter 6.)
- Associating a call with a contact. See page 5-15.

- Parking a call. See page 5-15.
- Sending a call to voicemail. See page 5-16.
- Playing a caller's name over your speakers. See page 5-16.
- Disconnecting a call while staying on the phone. See page 5-16.
- Entering an account code for a call. See page 5-17.
- Flagging a problem call to report later. See page 5-17.

Instructions for each of these commands appear in the following sections.

Note: To perform a Call Monitor command on a call, you must first select the call.

Putting a call on hold

To put a call on hold, select the call, and then choose **Actions > Hold**. Alternatively, double-click the call or select the call and press Enter.

To retrieve the call from hold, select the call and either choose **Actions > Take Call**, double-click the call, or press **Enter**.

You can put as many calls on hold at one time as you want. The **Duration** column in the Call Monitor folder shows how long each call has been waiting on hold.

Note:

- Use ViewPoint instead of the Hold button on your phone to put calls on hold. When on hold from ViewPoint, callers hear your system's hold music, but they hear only silence if you use your phone's Hold button.
- If you're using a digital feature phone with multiple line appearances, you do not hear dial tone after putting a call on hold. To get dial tone, select an unoccupied line.

Ringback for calls on hold

By default, if you hang up with one or more calls on hold, Wave's ringback feature rings your phone to remind you. When the call rings back, the call's status in the Call Monitor changes to **Ringing (On Hold)**. Talk to your Wave system administrator about configuring ringback behavior.

Transferring a call

The Call Monitor folder allows you to easily transfer a call to any party, either another Wave user or someone at an external phone number. You can look up users and contacts by name, and you can see in advance if an extension is busy. You can also transfer a call to an auto attendant or to a user's voicemail.

Drag-and-drop transferring

With the Phonebook pane showing in the Call Monitor folder, you can drag a call from the Call Monitor to an extension to transfer the call to that extension, or to a contact's name to transfer the call to the contact's default number. For more information about drag-and-drop commands, see "Dragging and dropping items" on page 2-28. To show the Phonebook pane, see "Adjusting the Phonebook Pane layout in the Call Monitor" on page 2-26.

Blind, supervised, and direct-to-voicemail transfers

You can transfer a call in one of the following ways:

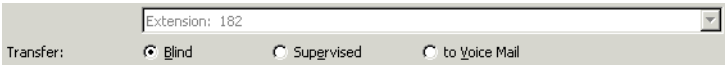
- **Blind transfer**, sometimes called an unattended transfer. You transfer the call without first speaking to the recipient. When the recipient answers the phone, the call is connected.
- Blind transfers occur automatically when transferring a ringing call, and when transferring to voicemail or an auto attendant.
- **Supervised transfer**, sometimes called an attended or consultation transfer. You speak to the transfer recipient first, while the caller is placed on hold. You can then complete the transfer, or conference the three of you together, or cancel the transfer and return to the caller.
- **Direct to voicemail**. You transfer the call directly to an extension's voicemail.

To transfer a call

1. Select the call that you want to transfer.
2. Choose **Actions > Transfer.** The Transfer To dialog opens.
3. Select the person or enter the number to which to you want to transfer the call. See "Placing a call" on page 6-1 for instructions.

   Note: You may be prohibited from transferring an external caller to an external number. See your Wave system administrator for more information.

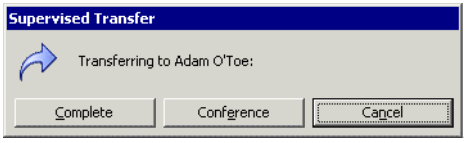
4. In the **Transfer** field at the bottom of the dialog, click either **Blind**, **Supervised**, or **to Voicemail**. See the beginning of this section for more information about the different types of transfers.



5. Click **OK**. If you selected **Blind** or **to Voicemail**, the transfer is completed and the call disappears from your Call Monitor.

   Note: If you selected **Supervised**, you are connected to the recipient's extension, and the caller is put on hold. The incomplete transfer displays as a linked three-party call in the Call Monitor.

6. Speak to the recipient and announce the caller. A dialog opens and asks you if you want to complete the transfer or cancel it.



7. Choose one of the following options:

   - **Complete.** The transfer is completed and the call disappears from your Call Monitor. You can also complete the transfer by hanging up the phone.
   - **Conference.** The caller, the recipient, and you are all connected in a conference call.
   - **Cancel.** The transfer process ends and you are reconnected to the caller, so you can transfer him or her to voicemail or another destination.

Transfer tips for operators

By using Groups and showing the Extensions tab of the Phonebook pane in the Call Monitor folder, you can easily find and choose the recipient of a call that you want to transfer. Define Groups to represent the departments of your office. When transferring a call you can then view only the members of a Group, for example, the Marketing Group. You can see at a glance the names of members of the Marketing department and who is available to take a call. See "Using ViewPoint Groups" on page 10-17 and "Adjusting the Phonebook Pane layout in the Call Monitor" on page 2-26.

You can also transfer calls more easily by resizing the Transfer To dialog, by showing and hiding columns, and by sorting calls by column. See "Customizing ViewPoint for operators" on page 12-17.

Adding notes to a call

While a call is visible in your Call Monitor folder, you can type notes about the call in the Notes Pane. If the Notes Pane is not showing, click **Notes** in the bottom pane.

If the call is transferred to someone else, notes that you created about the call are sent with the call (for example, you can add a note such as "Customer wants to track invoice #123987" before transferring the call to your shipping department). When the call is complete, you can view or edit the notes for the call in the Call Log folder (see Chapter 8, "Using the Call Log Folder").

If the call is recorded or transferred to voicemail, you will see the notes associated with the recording.

Sending an email message about a call

From an active call, you can create an email message that's automatically preformatted with details about the call (from name and number, date and time, and so forth). This can be useful for receptionists who sometimes need to take a verbal messages from the caller.

To create an email from a call, select the call and choose **Actions > Send To**. A new email message opens preformatted with call details. You can add optional notes or message information before sending the email.

Recording a call

If your Wave system administrator has given you the required permission, you can record your Wave conversations, including conference calls. By default, recordings appear in your Voicemail Inbox folder, although the system may be configured to send them to another extension's Inbox.

The maximum length of a single recording is equal to the total number of minutes available in your voice mailbox. By default this is 20 minutes, but your Wave administrator may have set a different limit.

Note: You cannot receive more voice messages when your voice mailbox is full. You should check your available mailbox space after recording any conversation to be sure that you have space for new voice messages. See "Managing your voicemail maximums" on page 7-10 for more information.

Privacy issues with call recording

Some countries, states, or other locations require that you announce to callers that their calls may be or are being recorded. Be sure that you understand how to comply with call recording privacy requirements.

To record a call

1. During an active call, choose **Actions > Start Recording**. Wave starts to record the call. You may hear a regular beep while recording, depending on your system configuration.
2. To stop recording before the call is finished, choose **Actions > Stop Recording**.

To play a call you just recorded

1. Go to your Voicemail \ Inbox folder, or open another mailbox if your system is set up differently.
2. Select the recording.
3. Choose **Actions > Play**.

Using the phone commands

You can start and stop recording your calls using the ***16** phone command. You can also use the phone commands to listen to recordings in your Inbox. For more information, see the *Wave Phone User Guide*.

Associating a call with a contact

Unidentified calls appear in the Call Monitor folder as being from "Unknown." You can associate a particular unidentified call with one of your contacts, so that the Call Monitor and Call Log folders display a name with the call. You can also permanently associate the call's Caller ID phone number or text with the contact, so that Wave automatically identifies the contact on all subsequent calls from that phone.

To associate a call with a contact, choose **Actions > Associate**. See "Associating a call or Caller ID number with a contact" on page 10-11.

Parking a call

Parking a call puts a call on hold and lets any Wave user retrieve it from any Wave phone or ViewPoint program in your office. To display parked calls in the Call Monitor, choose **View > Show Tabs** from the Call Monitor, and check **Show all parked calls**.

To park a call

1. In the Call Monitor, select the call you want to park.
2. Choose **Actions > Park**. The **Status** column in the Call Monitor folder displays "Parked on <orbit number>.

Ringback for parked calls

By default, if you hang up with one or more calls on hold, Wave's ringback feature rings your phone to remind you. When the call rings back, the call's status in the Call Monitor changes to **Ringing (Parked)**. Talk to your Wave system administrator about configuring ringback behavior.

Unparking a call

You can retrieve a parked call from any Wave phone or from any PC running ViewPoint.

To answer a parked call from any ViewPoint program

1. Click **Tools > Unpark**. The Unpark dialog opens.
2. Select the call that you want to unpark and answer and click **OK**.

You can also answer a parked call by picking up a Wave phone, pressing ***53**, and then entering the parking slot number.

Sending a call to voicemail

To send an active call to voicemail, choose **Actions > Take Message**.

Playing a caller's name over your speakers

You can play a recording of a caller's name over your speakers at any time during a call by choosing **Actions > Announce Caller**. If you hear nothing, there is no voice title recorded for the caller.

Disconnecting a call while staying on the phone

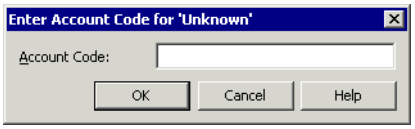
You can disconnect a call without hanging up the phone. Select the call, and then choose **Actions > Disconnect**. This command is useful if:

- You want to disconnect a single party in a conference call. Hanging up your phone would disconnect you from the whole conference.
- You are going to immediately dial another call. If you hang up and pick up your analog phone too quickly, Wave can read that as a Flash command, which would put the call on hold instead of disconnecting it.

Entering an account code for a call

While on a call, you can enter an account code for the call or change the one already entered.

1. Select the call, and then choose **Actions > Enter Account Code**.



2. Enter an account code. You can enter numbers, letters, or other characters.
3. Click **OK**.

You can also enter an account code from the Call Log after the call is complete. See "Entering an account code for a Call Log entry" on page 8-8.

Wave

Flagging a problem call to report later

The "Flag a Problem" button in the Call Monitor toolbar lets you click once to flag a problem call, for example, a call that is not displayed correctly in the Call Monitor, or a call in ViewPoint that doesn't match the call on your phone. Any time after flagging calls, you can run the Problem Report Wizard once and gather the logs for all of the flagged calls.

Flagging a call streamlines the process of using the Problem Report Wizard (see Appendix C) to report problems about individual calls to your system administrator. For example, a company operator might have too many calls coming in and cannot afford the time away to run the Problem Report Wizard for each individual call.

To flag a problem call

1. In the Call Monitor, select the problem call.
2. Click the "Flag a Problem" button on the toolbar.
3. If prompted in the Problem Notes dialog, enter notes about the problem, and then click **OK**. (By default, you will not be prompted to enter notes. To configure this behavior, contact your Vertical support representative.)

To gather logs for all flagged calls

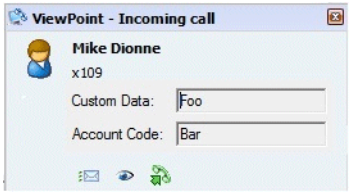
1. At a less busy time, run the Wave Problem Report Wizard from the Start menu by choosing **All Programs > Vertical Wave ViewPoint > Wave Problem Report Wizard.**

   Note: Running the Problem Report Wizard from the Start menu picks up the appropriate logs for any flagged calls across multiple ViewPoint sessions. You can also run the Wizard from within ViewPoint by choosing Help > Report a Problem, but this will only gather the logs for calls flagged during the current ViewPoint session.

2. Follow the onscreen instructions. On the second Wizard screen, deselect the **This problem involved a specific call or message** checkbox.

Incoming call indicators

When you receive an incoming call, the Incoming Call Alert window opens, displaying the caller's name and number, if available. Optionally, your Wave administrator may specify up to 3 additional Call Monitor fields to be displayed in the Incoming Call Alert window, as in the following example.



Note: In this version, a size restriction on the Incoming Call Alert window prevents it from displaying all data for all 3 optional fields. If you manually resize the Incoming Call Alert window, the new size will be retained when the window is displayed for subsequent calls. If the Incoming Call Alert window displays only the caller name and number, you cannot resize it.

Click the icons in the popup to (from left to right) send the call to voicemail, send to voicemail and screen the massage, or take the call.

If you have a phone that displays Caller ID, you can use it as an incoming call indicator.

Sharing your Call Monitor folder

Your Wave system administrator can share your Call Monitor with other users. Those users see your calls when they click on a tab with your name on it in their Call Monitors. If they have View and Edit permission, they can answer your calls using that tab and perform all call-handling commands on them. If they have View Only permission, they can see your calls but cannot answer them or perform any commands on them.

Note: Calls you receive from a Contact Center queue can be seen only by fellow agents in your queue, even if you are sharing your Call Monitor folder with other users.

When your calls are shared with another user, they appear as expected in your own Call Monitor, but if the other user accepts one of your shared calls, you cannot manage it or take it.

A shared Call Monitor does not mean that calls ring at another user's phone. To have your calls ring at another user's phone, forward your calls to that user. For more information about call forwarding, see Chapter 9.

You can use call sharing in the following ways:

- A coworker can cover your calls when you step away from your desk.
- Your assistant can screen all your calls and pick up routine calls while letting important calls go through to you directly.

Example: A manager shares calls with an assistant so that the assistant can see the manager's calls. Based on the caller's name or number, the assistant lets some calls go through, answers other calls, and sends some calls directly to the manager's voicemail. If another call arrives while the manager is already on a call, the assistant can see with whom the manager is talking, determine if the current call is too sensitive to be interrupted, and handle the call appropriately.

For more about sharing a Call Monitor, see "Sharing folders" on page 2-35.

Viewing shared calls

When another user's Call Monitor is shared with you, a <call owner name> tab for each user appears in your Call Monitor folder. This tab displays only the calls for that user.

When another user's Call Monitor is shared with you, the following tabs appear in your Call Monitor folder:

- A <call owner name> tab for each user who has shared calls with you. This tab displays only the calls for that user.
- The All tab, which displays all calls including shared calls. The calls are organized by call owner name.

See "Call Monitor folder tabs" on page 5-3 for information about how tabs are used in the Call Monitor to display calls.

Placing Calls in ViewPoint

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Placing a call

ViewPoint provides the following ways for you to place calls:

- Placing calls using the Dial bar. See page 6-2.
- Using the Place Call To dialog. See page 6-3.
- Quick-dialing from ViewPoint folders. See page 6-6.
- Placing calls using drag-and-drop. See page 6-7.
- Placing calls using other contact managers. See page 6-8.

You can use any of these methods to place a call from a Wave phone (any phone physically connected to a port on the Wave Server), a remote phone (any phone external to the Wave system, for example a cell phone, home phone, or legacy PBX phone), or the ViewPoint Softphone.

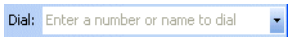
Note: Another way to place a call to a user is to double-click the user in the Extensions list.

Placing calls with the phone on- or off-hook

When placing calls from ViewPoint you can choose the command with your phone either on-hook or off-hook. If the phone is on-hook when you place a call, your phone rings immediately after you finish dialing the number. If the phone is off-hook when you place a call, you hear Wave dialing the number.

Placing calls using the Dial bar

ViewPoint has a Dial bar on the menu bar that you can use to place calls.



To place a call using the Dial bar

1. Type either of the following in the Dial bar:
   - **The number to dial.** If it is an external number, type the full number including area code (10 digits in North America, for example 6173540600). Do not enter a Wave access code (such as 9). To dial international numbers enter + followed by the country code and the number, for example +44 020 7323 8299. Do not add the international access code (for example, 011 in North America).

     Note: Hyphens, spaces, periods and parentheses are allowed.

   - **The name or partial name of a user, contact, or contact company name.** Wave searches all of the Contacts, Extensions, and Groups for a match. If only one match is found, the system places the call immediately. If there is more than one match, a dialog opens and you can select a name on the list and click Dial to place the call.
2. To specify an account code for the call, add a vertical bar character (|) after the number, followed by the account code.
3. Press **Enter** to place the call.

You can also drag-and-drop items into the Dial bar, including a text phone number from another application. See “Placing calls using drag-and-drop” on page 6-7.

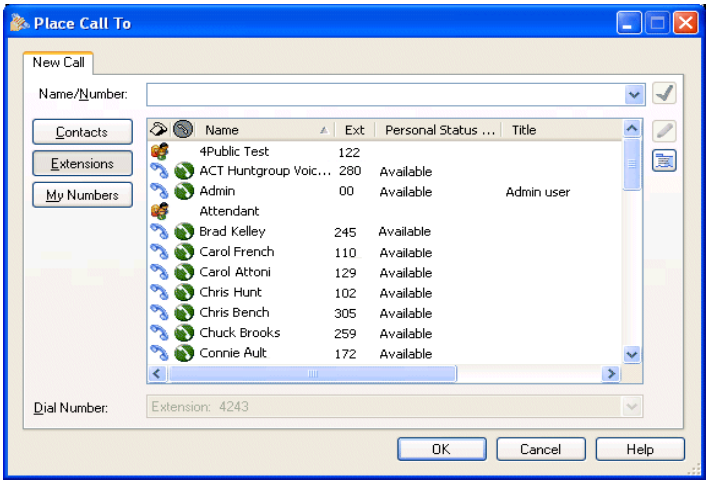
To redial a call using the Dial bar

Click the arrow on the right of the Dial bar for a list of recently dialed names and numbers. Click a number to redial it.

Using the Place Call To dialog

The Place Call To dialog visually guides you to place a call. It is not as efficient as using the Dial bar (if you know the person's name or number) or the Call Monitor's Phonebook pane.

1. Choose **File > New > Call**. The Place Call To dialog opens.



2. Enter or select the number to dial in one of the following ways:
   - Enter the number to dial in the **Name/Number** field. You can also type the name of a contact or user.
   - Click **Contacts** and select a contact on the list.

     The contact's default phone number appears in the drop-down list below the main list. If the contact has more than one phone number associated with it, you can select a different number to call on the drop-down list.

     To create a new contact, click to open a new Contact dialog. To edit the currently selected contact, press Alt and click . See "Entering a new contact" on page 10-5 for more information.

- Click **Extensions** and select an extension in the list. The list is identical to other Extensions lists in ViewPoint (see “Viewing Wave extensions” on page 4-1).

  If the extension is a user with public numbers (My Numbers marked as public), you can choose one of those numbers from the drop-down list below the main list. See “Entering My Numbers” on page 6-5 for more about public numbers.

- Click **My Numbers**. To place a call to one of your own phone numbers, such as your home or mobile phone, select it on the list. You can double-click a blank category to enter a new number for it.

  Note: To verify that the phone number is entered in a correct format, click .

3. To enter an account code for the call, type a vertical bar character (|) after the number, followed by the account code.
4. Click **OK** to place the call.

   Note: If you are using the ViewPoint Softphone, try the following troubleshooting tips if your phone does not ring when you click **OK** to place a call. (This information does not apply if you are using any other type of phone.)

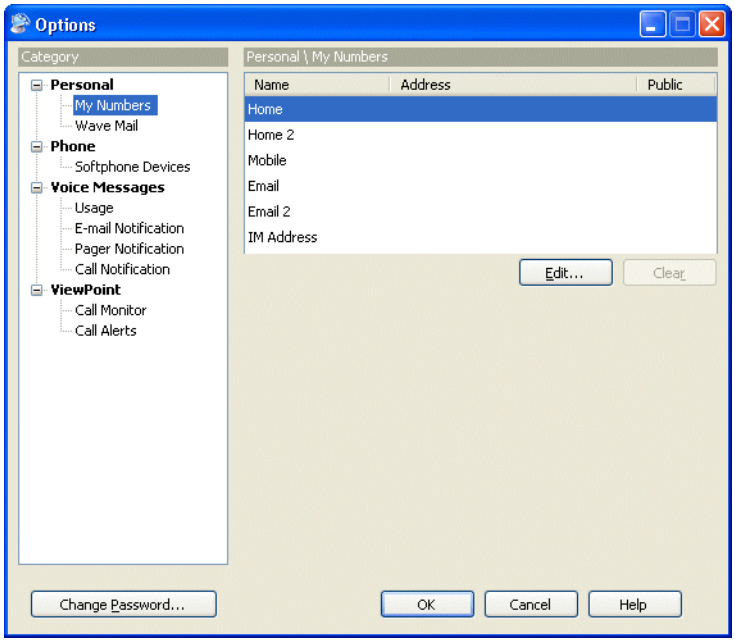
   - If you can see the call in your Call Monitor, select the call and choose **Actions > Take Call**. If you can take the call successfully, it means that your audio device is working, but that the default ringing WAV file may not be opening correctly. See your Wave administrator.
   - If you can see the call in your Call Monitor, but you cannot take the call as described above, check your Softphone device settings (**Tools > Options > Phone > Softphone Devices**). If the settings are disabled, there may be a problem with the device configuration or the device settings were not loaded correctly. Checking your physical devices and device drivers in Windows may help you identify the problem, or contact your Wave administrator.
   - Check your phone’s status in the Extensions view. If the status is off-hook but you are not connected to the call, report the problem using the Problem Report Wizard. (This step gathers the appropriate logs and trace files that may help your Vertical support representative troubleshoot your problem.) See “About the Problem Report Wizard” on page C-1 for more information.
   - Exit and log back into ViewPoint to see if that resolves the issue.

Entering My Numbers

You can store your own phone numbers in your Wave account, such as your home number or mobile phone number, e-mail address, or instant messaging address. When placing, forwarding, or transferring a call, you can click **My Numbers** and then select one of your numbers.

To enter a number or address in the My Numbers list

1. Choose **Tools > Options**. The Options dialog opens.
2. Click the Personal \ My Numbers tab.



3. Click the type of number you want to enter or modify, for example **Home** or **Mobile**, then click **Edit**.

   To delete a number, select it and then click **Clear**.

4. In the **Number**, **Email**, or **IM address** field, enter the phone number, email address or instant messaging address.

5. Select the **Public** checkbox to make the number publicly available. This has the following effects:

   - Other users can quick-dial your public numbers by right-clicking your name in their ViewPoint Extensions list. If this checkbox is not selected, the number is kept private and does not appear on this right-click menu.
   - When a call comes into Wave from one of your public numbers, your name appears in the **From** column, and can be used to identify you, for example by other users' call rules. If unchecked, calls from the number display as from "Unknown."

     Note: In cases where the same number is defined in different places, Wave chooses the name to display by prioritizing as follows: (1) a user's public number, (2) a public contact, (3) a private contact.

   Note: Other programs can access to the number, for example, a ViewPoint Add-in that automatically dials certain numbers. If unchecked, other programs cannot read or access the number, though your system administrator can still view it.

6. Click **OK** to return to the Options dialog.
7. Click **OK** to close the Options dialog.

Quick-dialing from ViewPoint folders

In certain ViewPoint folders you can quickly place calls by either right-clicking an item or selecting it and using the **Actions** menu. You can choose the following commands:

- **Speed Dial.** Immediately places a call to the default number of the selected item. For a user, it is his or her extension. For a contact, it is the contact's default phone number.
- **Place Call.** Opens a sub-menu that lets you choose from all the available numbers for the selected item (for example, all of a contact's numbers). You can also choose **Other** to open the Place Call To dialog with that item selected (see "Using the Place Call To dialog" on page 6-3).

You can quick-dial the following types of calls from ViewPoint folders:

To quick-dial...	Use this folder	Notes
A user or other extension	**Extensions** (or the Extensions list in the Call Monitor's Phonebook pane)	
A caller (call back)	**Call Log**	Places a call to the Caller ID or callback number associated with the call.
A message (call back)	**Messages** (Inbox or other folder)	Places a call to the Caller ID or callback number associated with the message.
A contact	**Contacts** (or the Contacts list in the Call Monitor's Phonebook pane)	

Speed dialing by double-clicking

In the Extensions list, double-clicking an extension speed-dials that extension.

In the Contacts folder, double-clicking a contact may speed-dial the contact's default number, depending on how you have configured your Contacts folder (see "Defining double-click behavior in the Contacts folder" on page 12-19).

Placing calls using drag-and-drop

You can place a call to an extension, contact, or Group by dragging and dropping it either into the Call Monitor or the Dial bar. When dropped, Wave places the call using the default phone number.

For a complete list of ViewPoint drag-and-drop operations, see "Dragging and dropping items" on page 2-28.

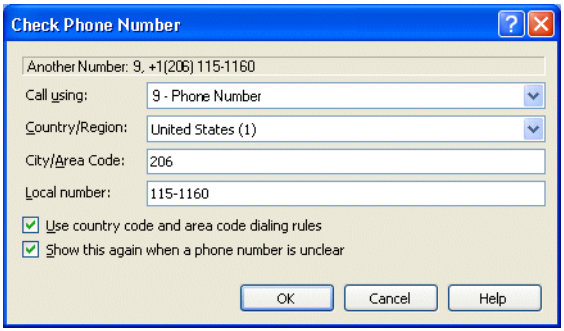
Placing calls using other contact managers

You can place calls by using other contact managers such as Microsoft Outlook, GoldMine or FrontOffice 2000, or Interact Commerce Corporation's Act!. For more information, see "Using the Wave TAPI Service Provider and Contact Manager Assistant" on page 1-2.

Checking a number

To confirm that Wave has correctly interpreted a number or address that you have entered—for example, that it has recognized the correct country on an international call—click ✓ next to the **Number** or **Address** field. The Check Phone Number dialog opens. You can correct any dialing errors here before you place the call.

Note: The Check Phone Number dialog opens automatically if the number you entered was unclear or ambiguous.



To check a phone number

1. Under **Call Using**, make sure the appropriate dialing service is selected for the type of call.
2. Under **Country/Region**, make sure the correct country is selected.
3. Under **City/Area code** and **Local number**, confirm that Wave has interpreted the number correctly.
4. Select **Use country code and area code dialing rules** if you want Wave to apply dialing rules that determine if a number is a local or long-distance call. Clear it to have Wave dial the number exactly as entered, as if you had dialed it on the phone.
5. Click **OK** to close the Check Phone Number dialog.

Redialing numbers and returning calls

You can quickly perform the following dialing actions in ViewPoint:

- **Redial the last number you dialed.** Press **F12** on your keyboard.
- **Return the last call you received.** Press **F11** on your keyboard. The name of the last caller and the phone number appear in the status bar at the bottom of ViewPoint window.

Both these features are available from the File menu, including redial options for the last four calls you placed while ViewPoint was running. You can redial older calls from the Call Log.

You can also redial and return calls using the Dial bar (see “Placing calls using the Dial bar” on page 6-2) or the phone commands (see the *Wave Phone User Guide* for more information).

Creating conference calls

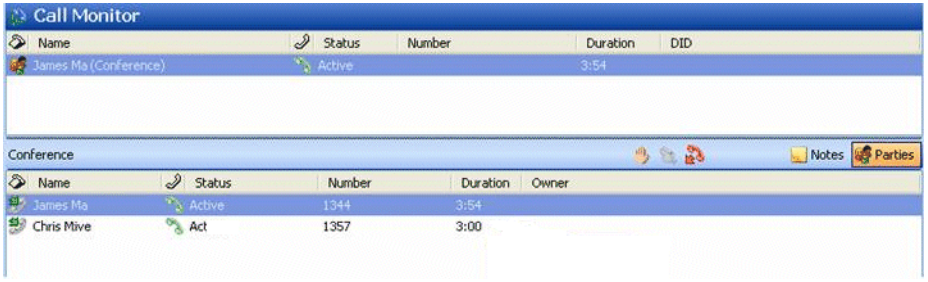
Wave lets you easily conference multiple calls together. The Call Monitor folder treats a conference call as a single call.

The maximum number of parties that can be in a single conference can be as few as 4, or as many as 30, depending on how your Wave system was set up. Ask your Wave system administrator for details.

You can create a conference call by:

- Adding parties one at a time to a call
- Combining separate active calls into one call

Conference calls appear in the Parties pane of the Call Monitor. The Parties pane shows all participants other than yourself Right-click a participant in the Parties pane to perform commands on that participant, for example Hold or Disconnect.



Adding parties to a conference

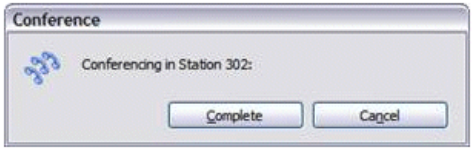
Use this procedure to start and build a conference call. The call is placed on hold while you are adding new parties, but the parties already conferenced can continue to talk to each other.

1. Dial the first party and wait for an answer.
2. Click the call in the Call Monitor folder.
3. Choose **Actions > Conference**. The Conference dialog opens.
4. Select the second party for the conference call or enter a phone number to dial, and then click **OK**. See “Placing a call” on page 6-1 for more information.

   Note: If you have more than one active call when you choose the Conference command, click the New Call tab in the Conference dialog to place the call.

5. While the call is ringing, the only option in the Conference dialog is **Cancel**, which disconnects the call:

   After the call is answered, you are connected to the new party in a separate call. The Conferencing dialog then presents the following options:

   - **Complete**. Click to add the new party to the conference call.
   - **Cancel**. Click to disconnect the new party’s call. You are returned to the conference call.

6. Repeat steps 2-5 to add more parties to the conference.

Adding parties to a conference using drag-and-drop

To drag and drop parties into a conference, you must have the Calls pane open in the Extensions or Contacts folder, or the Phonebook pane open in the Call Monitor folder. For more information, see “Adjusting the Phonebook Pane layout in the Call Monitor” on page 2-26 for instructions.

Drag and drop parties to the conference as follows:

- Using the Calls Pane in the Extensions or Contacts folder, you can drag users or contacts onto the active call in the Calls Pane to automatically add them as parties to the conference. If you press Shift while you drag a user from the Extensions list, the Conference dialog opens and provides further options.
- Using the Phonebook Pane in the Call Monitor folder, you can create a conference call by pressing Shift and dragging and dropping a call, contact, or extension onto another call.

Note: For other drag-and-drop operations you can perform in ViewPoint, see “Dragging and dropping items” on page 2-28.

Conferencing multiple active calls together

Use the following procedure when you have two or more separate existing calls that you want to conference together with yourself. Note that you cannot conference two conference calls together.

To conference separate existing calls together:

1. Select all the calls that you want to conference together. Press Ctrl on your computer keyboard as you select multiple calls.
2. Choose **Actions > Conference**. The selected calls are now conferenced with you.

Ending a conference call

A conference call normally ends when all parties hang up at roughly the same time. If you leave the conference call early, by default the conference call continues without you. The other participants can continue to talk, even if you started the conference and your company is paying for the outgoing calls used to create it. To terminate the call, each participant must hang up, or you must disconnect all parties.

Your system may be configured to disconnect the conference when you leave.

Supervising other users' calls

With the proper permissions, you can enter another user's call as a third party without being invited. This is usually done by a manager to supervise the other user, or by an operator to briefly join someone's call to announce something that needs immediate attention.

You can supervise calls in the following ways:

- **Monitor.** You can listen to the other user's call without being heard by the other parties in the call.
- **Coach.** You can speak to the other user without being heard by other parties in the call. The other user is the only party to hear you. You hear all parties.
- **Join.** You join the call as a full participant, able to hear and be heard by all parties in the call. Essentially, you create a conference call by inviting yourself in.

Note the following:

- Each supervise command is available *only* if you have permission to use that command *and* the user is configured to allow being supervised with that command. When supervising a call with multiple users, all other users in the call must be configured to allow being supervised with that mode. If even one user already in the call does not permit being supervised, you cannot supervise the call. Talk to your Wave system administrator about whether you can monitor, coach, and join other users' calls, and which users you can supervise, if any.
- You can monitor or join a *call*, but you coach a *party* in the call. For example, once you have joined a conference call, you need to right-click one of the parties in the call in the Parties pane in order to see the **Coach** option.

- To coach, monitor, or join a call, at least one party in the call must be from the local Wave system. For example, monitoring a call between two Gateway users (a Wave user whose "home" is another node in the WaveNet network) is not supported.
- Depending on your system setup, if the person you are supervising leaves the call—for example, transfers it to someone else—you are disconnected.

To supervise another user's call using ViewPoint

1. Select one of the following:
   - A call in the Call Monitor or Queue Monitor.
   - A user in the Extensions list who is currently on a call.
   - A Contact Center queue agent in the Agents pane of the Queue Monitor.
2. Choose **Actions > Supervise**, and select the supervisor mode you want to use. The option is available only if both you and the other users in the call permit that supervisor mode.

To supervise another user's call using the phone

1. Pick up the phone and enter one of the following commands at the dial tone:
   - ***57.** Join.
   - ***58.** Coach.
   - ***59.** Monitor.
2. Enter the extension of the user whose call you want to monitor, coach, or join, followed by **#**.
3. Press **1** to confirm the extension, or press ***** to enter a different extension.

   Note: You can enter the complete digit string rapidly without waiting for the prompts. For example, ***58 102# 1** to coach extension 102.
4. Once connected to the call, you can use the following phone command options:
   - To change the supervising mode—for example, from monitoring to coaching—press **Flash**, then enter the code for the new mode.
   - To supervise a different user, press **Flash #** to return to the dial tone, then begin again.

Using the ViewPoint Softphone

The ViewPoint Softphone is software included with ViewPoint that appears as a new Dial Pad tab in the Call Monitor.

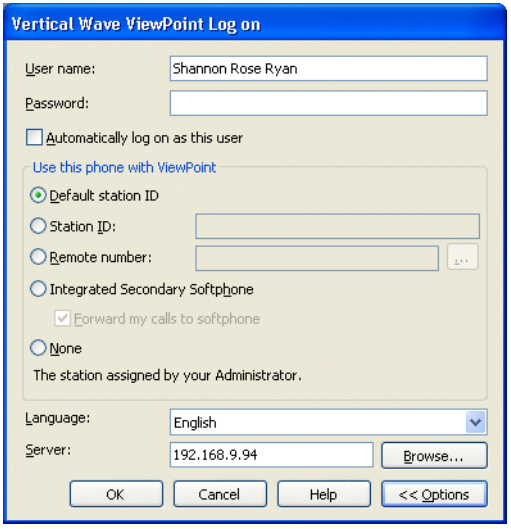
If you have been configured to do so by your Wave administrator, you can use the ViewPoint Softphone in either of the following ways:

- **As your primary phone**, if you do not have a physical phone. You can use the ViewPoint Softphone as your primary phone from the local LAN or when you run ViewPoint while logged in via VPN from a remote location.
- **As your secondary phone**, when you are away from your physical phone, for example when you are on the road.

You must have audio playback and capture devices (microphone and speakers, headset, or other USB audio devices) on your PC or laptop in order to logon using the ViewPoint Softphone. The default Softphone device settings will work in most cases. For information about how to optionally modify the default settings, see “Configuring the ViewPoint Softphone” on page 12-10.

Specifying the ViewPoint Softphone when you log on

You specify how you want to use the ViewPoint Softphone when you log on to ViewPoint.



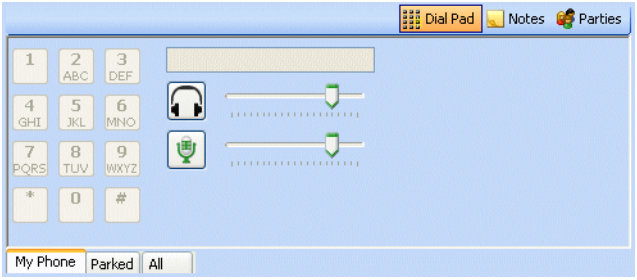
In the ViewPoint Logon dialog:

- **To use the ViewPoint Softphone as your primary phone**, select **Default station ID**.
- **To use the ViewPoint Softphone as your secondary phone**, select **Integrated Secondary Softphone**.

About the ViewPoint Softphone Dial Pad

When you select either of the options listed above when you log on to ViewPoint, a Dial Pad icon is displayed at the bottom of the ViewPoint Call Monitor pane:

Click on this icon to display the ViewPoint Softphone Dial Pad. (If the entire Dial Pad is not visible, click and drag the lower edge of the Call Monitor pane to adjust the viewing area.).



Number keys	Use to send DTMF tones while you are on a call, for example in response to prompts from an IVR application. The dial pad is disabled unless you are on a call. In this version, you cannot place a call using the ViewPoint Softphone Dial Pad. Use any of the standard methods to place a call in ViewPoint, as described on page 6-16.

	Click to toggle between using your headset while on a call, or your microphone and speakers. Use the slider bar to adjust the call volume.
	Click to mute or unmute the call. Use the slider bar to adjust the volume when you are recording a call.

Placing calls using the ViewPoint Softphone

Important: In this version, you cannot place a call using the ViewPoint Softphone Dial Pad.

To place a call when you are using the ViewPoint Softphone, use any of the methods described in this chapter:

- “Placing calls using the Dial bar” on page 6-2.
- “Using the Place Call To dialog” on page 6-3.
- “Quick-dialing from ViewPoint folders” on page 6-6.
- “Placing calls using drag-and-drop” on page 6-7.
- “Placing calls using other contact managers” on page 6-8.

Answering and handling calls using the ViewPoint Software

To answer a call when you are using the ViewPoint Softphone, double-click it in the Call Monitor.

See Chapter 5, “Receiving and Handling Calls in ViewPoint” for more information, including:

- “Selecting and acting on a call in the Call Monitor” on page 5-7.
- “Commands while a call is ringing” on page 5-8.
- “Commands while you’re on a call” on page 5-9.

Using a remote phone

A Wave mobile extension allows your remote phone to be treated as a Wave station. (A remote phone is any phone that is external to the Wave system, for example your cell phone, your home phone, or a legacy PBX phone from another phone system.)

With a mobile extension, you can do the following from your remote phone:

- Use ViewPoint to manage your voice messages and greetings, place outbound calls, answer and manage calls displayed in the Call Monitor, and so forth. This functionality is automatically available to you when you supply a remote number when you log onto ViewPoint, as described in “Using ViewPoint with a different phone, Wave Server, or language” on page 2-10.
- Use ViewPoint to manage calls that are forwarded to your remote phone or routed to your remote phone as a result of an action in your routing list. (This option is set for you by your Wave system administrator.)
- Use the Wave phone commands for full call control even if you are not using ViewPoint.

Using a remote phone with ViewPoint

When you place a call via ViewPoint or perform other ViewPoint actions remotely, Wave rings your remote phone's number to connect you so that you can perform the selected action. Because Wave calls you to connect you to place a call, calls placed via ViewPoint are billed to your office, not your remote phone's number.

To place a call from a remote phone using ViewPoint

1. Use any of the methods described in “Placing a call” on page 6-1 to place the call.
2. When Wave rings your phone, pick up your phone to be connected with the call.

To answer and handle a call using ViewPoint

- Use any of the methods described in Chapter 5.

Using a remote phone without ViewPoint

This section describes how to do the following:

- Place calls from a remote phone. See page 6-18.
- Answer and handle calls from a remote phone. See page 6-18.
- Use * commands form a remote phone. See page 6-19.

Placing calls from a remote phone

Placing an outbound call from your remote phone after logging into Wave requires permission. Ask your Wave system administrator if this feature has been enabled for you.

To place a call from a remote phone without using ViewPoint

1. Call into Wave from your remote phone.
2. When the system prompts you to enter an extension, enter **# <your extension> # <your password> #.**
3. Press **#** to get an internal dial tone.
4. Dial the number including the access code. (From internal dial tone, you can also dial other Wave extensions, and use the * commands - see “Using * commands from a remote phone” on page 6-19 for a list of available commands.)

Note: When placing a series of outbound calls from your remote phone, press ****3** to end each call instead of hanging up the phone. This keeps you connected to Wave. If you hang up, you must call into Wave and log on again to place another outbound call.

Answering and handling calls from a remote phone

When using the Wave phone commands with a remote phone, you must press ***#** instead of the Flash button to put calls on hold, use call-handling commands such as transfer or conference, and so forth.

To answer and handle a call without using ViewPoint

1. Pick up the phone to answer the call.
2. Press ***#** to access the Wave phone commands to handle the call.

Using * commands from a remote phone

The following * commands are available if you are using a mobile extension. Some * commands are only available if you are an agent in a Contact Center queue.

Feature	Press	Description
Station ID	*00	Identifies the station ID assigned to your phone.
Page	*11	Pages all phones with speakers.
Call as Queue	*14 + queue extension #	*Contact Center agents:* Sets outbound caller ID to the specified queue's name and extension for all subsequent calls. Press *14 # to revert to calling as yourself.
Set Personal Status to Available	*50	All calls ring through to you according to your current call forwarding, routing list, and other settings.
Set Personal Status to Available (Queue Only)	*51	*Contact Center agents:* Makes you available to start taking queue calls. Non-queue calls are sent directly to your voicemail.
Set Personal Status to Available (Non-Queue)	*52	*Contact Center agents:* Makes you unavailable at the end of your shift. Non-queue calls still ring your phone.
Set Personal Status to On Break	*53	*Contact Center agents:* Puts you on a break during your shift. While this status is selected, the queue does not send calls to you.
Terminate wrap-up time	*54	*Contact Center agents:* Terminates your wrap-up time early and marks you as ready to take queue calls again.

Feature	Press	Description
Hear Queue Statistics	*55	*Contact Center agents:* Plays current statistics for a queue.
Sign In or Out of Queue	*56 + queue extension #	*Contact Center agents:* Signs you in or out of the specified queue.
Monitor Call	*57 + extension	Lets you listen in on an active call. Neither the user nor the other parties in the call can hear you.
Coach Call	*58 + extension	Lets you coach a user on an active call. The user can hear you, but the other parties in the call cannot.
Join Call	*59 + extension	Lets you join another user's call as a full participant. All parties can hear you.
Block Caller ID	*67 + extension or number to dial	Keeps your caller ID information private for the next call.
Block Call Waiting	*70 + extension or number to dial	Turns off all audio and visual call waiting indicators available on your phone for the next call.
Conference	*71	Adds the party to a conference.
Night Answer - Enable	*85	Redirects all inbound calls to the Wave system to a predefined destination.
Night Answer - Disable	*86	Turns off night answer mode.

Feature	Press	Description
Log Incident	**	Logs a time stamp in the Wave system trace logs that may be useful when troubleshooting a problem.
Softhold (Accept Call Waiting)	*#	Places the active call on hold and connects you to the incoming call. If you put a call on hold when you are using a mobile extension and then hang up your phone, the party on hold will be dropped. This behavior is different than when you hang up with a party on hold while using a regular Wave phone (an internal station)—in that case, the party on hold remains on hold until you retrieve the call or the call rings back your phone.

For details on how to use a specific * code, see the *Wave Phone User Guide*.

Managing Voice Messages in ViewPoint

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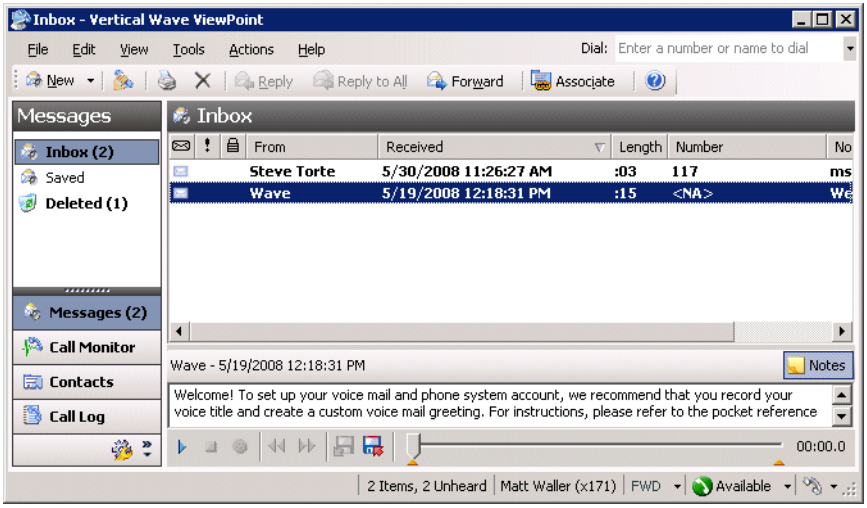
About managing voice messages in ViewPoint

You can manage your voice messages and call recordings in Wave ViewPoint in the same way that you manage e-mail messages in your e-mail program. Your new voice messages or recordings appear in a list in your Inbox folder according to the time and the caller. You can listen to them in any order you want, and you can easily forward them, reply to them, or save them.

For instructions on how to listen to voice messages or recordings using the phone commands, see the *Wave Phone User Guide*.

The Messages folder

The Messages folder is your complete voice mailbox. It contains your Inbox, Saved, and Deleted folders, which hold your voice messages as well as any call recordings sent to your mailbox. New messages appear in the Inbox folder. Use the audio controls above the status bar to play your voice messages. When you play a message, the audio bar shows elapsed message playback time in minutes and seconds.



Voice messages have the following display attributes:

- **Bold text** indicates a new (Unheard) message.
- **FW:** in the From column indicates a message that was forwarded to you.
- You can view the date on which a forwarded message was created by showing the Created column in the Messages folder. See “Customizing columns” on page 12-20.
- **RE:** in the From column indicates a message that was sent to you in reply to another message.

Messages folders

You can store your voice messages in multiple folders. The Messages folder contains three predefined folders:

- **Inbox folder.** New voice messages appear here. After you listen to them, they remain here unless you move or delete them.
- **Saved folder.** Saved messages appear here. When you save a message by using the phone commands, it moves to the Saved folder.
- **Deleted folder.** When you delete a voice message in ViewPoint, it is moved to the Deleted folder. Voice messages deleted using the phone commands do not appear in the Deleted folder. To empty the Deleted folder, see "Emptying the Deleted folder" on page 2-34.

Note: The Inbox and Saved folders are the only voice message folders accessible through the phone commands. Voice messages in other folders are not accessible using the phone.

Shared message folders

Your Wave system may be set up to share other users' voice message folders with you. If so, you will see each shared folder in your Messages folder. The actions you can perform in a shared folder depend on the permissions you've been given for that folder. Likewise, your own message folders can be shared with other users. To change folder sharing, talk to your Wave system administrator. For more about folder sharing, see "Sharing folders" on page 2-35.

Viewing Custom Data

Messages folders contains a Custom Data column that is hidden by default. By showing it you can view all custom data that your office might have associated with the call, for example, customer ID or caller priority. To show columns, choose **View > Current View > Show Columns**.

Archiving voice messages and call recordings

The system may be set up to periodically archive your older voice messages and call recordings. If you find that your messages disappear from your voice mailbox, ask your Wave system administrator whether they have been archived. You can access archived messages using the Wave Archived Recording Browser (see Appendix A).

Managing thousands of voice messages or call recordings

If you need to manage thousands or millions of messages or call recordings, you should have your Wave system administrator set up automatic archiving, or manually archive your messages. This eases the performance burden on ViewPoint and the Wave ISM, and you can still use the Archived Recording Browser to quickly review, search, and manage the recordings (see Appendix A).

Listening to your voice messages and call recordings

To listen to a voice message or call recording, double-click it in any Messages folder. For instructions on using the audio controls, see “Using the audio controls” on page 2-36.

You can play the message or recording either over your computer's speakers or over your phone. Choose **Tools > Audio Output** to switch audio output from one to the other. You can also use the button on the right side of the status bar.

Note: You can open other ViewPoint folders while a message is playing and the message will continue to play. The message stops playing, however, if you open a folder with another audio control visible, for example, the Greetings folder.

Listening to a voice message as it is being left

To listen to a voice message as the caller is leaving it, without being heard by the caller, see “Screening a voice message as it is being left” on page 5-9.

Handling your voice messages

You can perform the following tasks on a voice message using a few mouse clicks:

- Forward it to other users. See page 7-5.
- Reply to one or more users directly with a voice message of your own. See page 7-6.
- Return the call, if the Caller ID or contact information is available. See page 7-6.
- Export the voice message as a WAV or MP3 file. See page “Exporting ViewPoint recordings” on page 2-41.
- E-mail the voice message as a WAV or MP3 file attachment. See page 7-7.

- Open the contact record of the contact who left the message. See page 7-7.
- Call back the person who left you the message. See page 7-6.
- Associate a message with a contact so the caller is recognized. See page 7-8.
- Delete a voice message. See page 7-7.
- Mark an existing message Private, Unheard, or Urgent. See page 7-8.
- Add notes to an existing message. See page 7-9.
- Send a new voice message to other users. See page 7-12.

Forwarding a voice message

You can forward a voice message, except if it is marked Private, to one or more users. A copy of the message is sent directly to the voicemail of all recipients.

You can also attach a recording of your own at the beginning of the forwarded message. For example, “Bob, this is Jim. I received this message and thought you would want to hear it.” Your recording precedes the forwarded message.

To forward a voice message

1. In any Messages folder, right-click a voice message that you want to forward and select **Forward** on the shortcut menu. The Forward Message dialog opens.
2. In the **Available Users** list, select the users or groups to whom you want to forward the message. Selecting a group forwards the message to all members of the group. Select multiple items by holding the Ctrl key while you select.
3. Click **Add** to move the selected users/groups to the **Recipients** list.
4. Optionally, record a short message that introduces the message you are forwarding. Use the audio controls (for detailed instructions, see “Using the audio controls” on page 2-36).
5. Click **Send**. A copy of the selected voice message, preceded by your short introductory message, is forwarded to the recipients. When recipients select the message, they can view (in the **To** field) a list of other users who received the same message. Users can reply to the sender or to all recipients.

Replying to a voice message

Replying to a voice message lets you send a recorded reply directly to the voicemail of the user who sent you the message. You can send the reply to other users as well. Select the message and choose **Actions > Reply.** Then perform steps 3-5 of "To forward a voice message" in the previous section.

You can reply in this way only to a message left by another Wave user. You cannot send a message in reply to a message left by an external caller.

Note: Replying to a message sends a new message to another user's voicemail. To call back the person who left you the voice message, choose **Actions > Place Call** instead (see the next section).

Note: If the user who sent you the message has since been deleted, the **Reply** and **Reply All** options will be disabled in the Actions menu. In this situation, the sending user's name will remain in the messages's **From** field until you switch views, after which it will change to "Unknown".

To reply to all recipients of a message

1. Select the message.
2. Click **Actions > Reply to all**.

   The recipients are listed in the Recipients pane of the Reply to Message dialog.

Calling back the person who left a voice message

You can call back the person who left you a voice message by using the Wave **Place Call** or the **Speed Dial** command. **Place Call** lets you choose the number to call if several numbers are available. **Speed Dial** returns the call to the default number.

Note: On messages from unidentified callers, Wave places a call to the phone number from which the message originated. If the message was left by someone calling from an office (PBX) extension, you might not be able to connect to the correct party.

To call a person back

1. Select the voice message left by the person you want to call back.
2. On the **Actions** menu, choose **Place Call** or **Speed Dial**.

E-mailing a voice message

You can e-mail a voice message as a WAV or MP3 file attachment to someone who is outside the Wave system.

To e-mail a voice message, you must have an e-mail reader that supports MAPI installed on your computer, such as Microsoft Outlook or Eudora Pro.

To e-mail a voice message

1. Select the message you want to send by e-mail.
2. Choose **File > Send To**, and select the desired format for the **Mail Recipient**. Your MAPI mail ViewPoint Send dialog opens with the message attached.
3. Address and send the e-mail as you normally would.

Opening the contact record from a voice message

If a voice message was left by an identified contact (see Chapter 10), you can open the contact record to view or change information about the contact. To do so, choose **Actions > Open Contact**.

Deleting voice messages

By default, messages in the Deleted folder that are older than three days are permanently removed from Wave. For information about how to change the default, see “Emptying the Deleted folder” on page 2-34.

To move a voice message to the Deleted folder

1. Select the message.
2. Choose **Edit > Delete**. The message is moved to the Deleted folder. You can still play it or retrieve it if necessary.

Deleting a voice message permanently

To delete a message permanently, hold down the Shift key while you choose the Delete command. A message is also deleted permanently when you delete it from the Deleted folder or empty the Deleted folder. See “Managing the Deleted folder” on page 2-33.

Associating a voice message from “Unknown” with a contact

A voice message that appears from “Unknown,” means that Wave could not identify the caller as a Wave contact or user (Caller ID, if present, is still shown in the **Number** column). You can associate the message with a contact, so that the correct name appears in the Call Monitor and so that Wave identifies the contact on subsequent calls from that phone.

See “Associating a call or Caller ID number with a contact” on page 10-11 for complete instructions.

Marking a voice message unheard

To mark an old (heard) voice message as new (Unheard), select the message and then choose **Actions > Mark As Unheard**.

Marking a voice message Urgent or Private

You can mark a voice message Urgent, Private, or both. Private messages cannot be forwarded, and users who share your mailbox cannot play them, reply to them, or call back the sender.

The icons in the columns to the right of the envelope icon show whether a message is Urgent or Private .

- To mark a voice message Urgent, select the message and choose **Actions > Urgent**. Select the command again to remove its Urgent status.
- To mark a voice message Private, select the message and choose **Actions > Mark As Private**. After a message is marked Private, it cannot be made not Private again.

Adding notes to a voice message

To add written notes to a voice message, click the message and type your notes in the Notes Pane at the bottom of the Messages folder. Notes that you enter during a recorded call are automatically saved with the recording in your Inbox.

Any notes on a message accompany that message when it is forwarded to another user.

Hiding and showing notes

To hide or display the Notes Pane, choose **View > Notes Pane**. To hide the Notes column, see “Showing and hiding columns” on page 12-20.

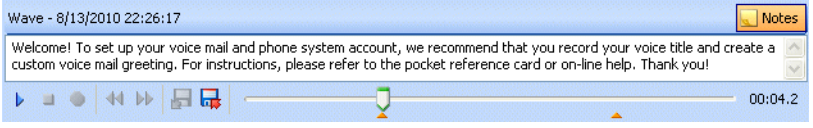
Adding bookmarks to a voice message

You can add bookmarks to a voice message to indicate a specific section within the message.

This is useful if you want to be able to reference specific details later. Also, since bookmarks accompany the message when it is forwarded to another user, when forwarding a long message, you can use bookmarks to direct the recipient’s attention to a specific section.

Note: Adding bookmarks does not shorten the voice message or change it in any way—it just positions message playback to start at the first bookmark and end at the second bookmark. The entire message is still available for playback.

To add bookmarks to a message, use the orange triangles at the bottom of the playback bar.



Click and drag each bookmark to the point in the message that you want to reference.

Managing call recordings

The following types of call recordings can appear in your Inbox:

- Recordings that you made yourself using the Call Monitor (see “Recording a call” on page 5-13).
- Recordings made automatically by the system. Usually such recordings are sent to the voice mailbox of a Wave system administrator or Contact Center queue supervisor. If you are receiving such recordings in error, speak to your Wave system administrator.

You can listen to a call recording by double-clicking it, just as you listen to a voice message. Any command you can use on a voice message you can also use on a call recording.

Managing your voicemail maximums

Choose **Tools > Options > Voice Messages > Usage** to view the size of your voice mailbox (in minutes), and the percentage of that space you have used.

Your voice mailbox has a limited amount of disk space (in minutes) to store your voice messages. In addition, your mailbox has a maximum length for any individual message. The default is 180 seconds (3 minutes).

Note: If you log on to Wave using the phone commands and your voice mailbox is nearly full, Wave prompts you to empty your Deleted folder.

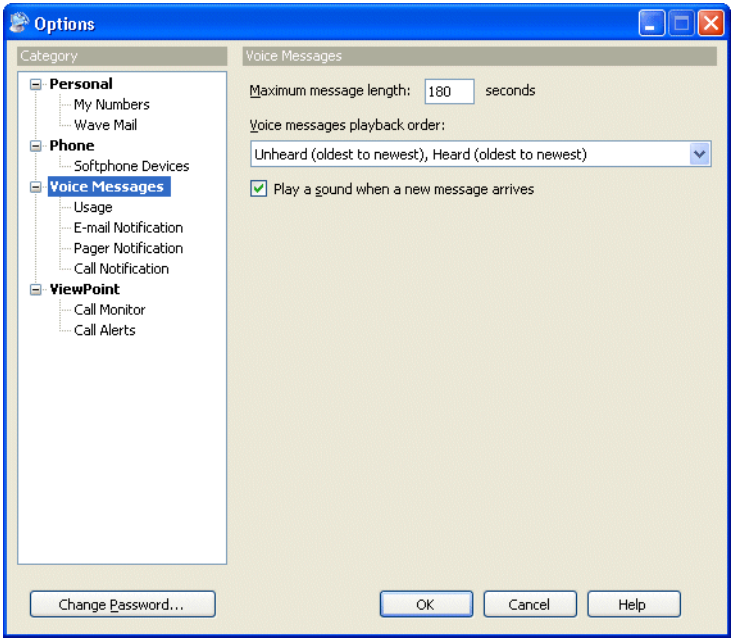
Setting a maximum length for your voice messages

You can conserve space by setting a maximum length for voice messages. If a message exceeds the time limit, Wave ends the message. The default maximum is 180 seconds (three minutes). The highest maximum you can set is 300 seconds (5 minutes), unless your Wave administrator changes the limit.

Note: Call recordings are not limited by message length specified here, but are limited only by the size of your voice mailbox.

To set the maximum length for voice messages

1. Choose **Tools > Options**. The Options dialog opens.
2. Click the Voice Messages tab.

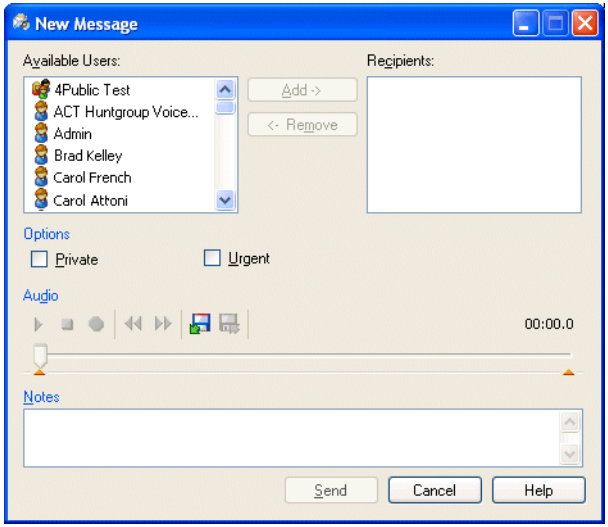


3. In the **Maximum message length** field, enter the maximum voice message length in seconds.
4. Click **OK**.

Sending a message directly to a user's voicemail

You can record a message and send it directly to the voicemail of one or more Wave users.

1. Choose **File > New > Voice Message**. The New Message window opens.



2. Click the recipients who you want receive the message in the **Available Users** list. Hold down the Ctrl key as you click to select multiple users. If you select a Group, the message is sent to every user within the Group.
3. Click **Add** to move the selected users to the **Recipients** list.
4. Use the audio controls to record the message. For instructions, see "Using the audio controls" on page 2-36.
5. Select any of the following options:
   - **Private.** The voice message is marked Private and cannot be shared by the recipients.
   - **Urgent.** The voice message is marked Urgent.
6. In **Notes**, type any notes that you want to accompany the message. The notes appear in the Notes column of the recipients' Messages folders.
7. Click **Send** to send the message.

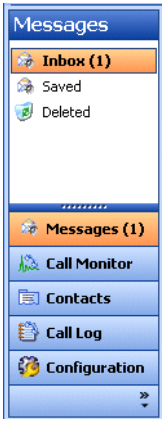
Knowing when you have new voice messages

New voice messages appear in the Inbox folder soon after they are left. Wave indicates new voice messages in the following ways:

- Number in navigation pane
- Stutter dial tone
- Message-waiting light (if supported by your phone)
- Sound played
- E-mail, pager, and call notifications

Number displayed in the Navigation Pane

ViewPoint's navigation pane displays the number of new messages in two places: next to **Inbox** in the navigation bar, and next to the specific folder (for example, **Messages**) in the Favorite Folders list.



Stutter dial tone

A dial tone that begins with a stutter when you pick up the phone indicates that you have Unheard voice messages.

Message waiting light

If your phone has a message waiting light that Wave supports, you can have it flash to indicate new voice messages.

Sound played

You can have Wave play a sound whenever a new voice message arrives. Choose **Tools > Options**, click the Voice Messages tab, and select the **Play a sound when a new message arrives** checkbox.

E-mail, pager, and call notifications

Wave can alert you by e-mail, page, or phone call whenever you receive a new voice message. This feature is handy if you are working at a remote location without ViewPoint. You can then call your office and hear your messages. Your Wave system administrator can set up e-mail, pager, and call notification for you.

You can receive notification for all voice messages, or for urgent messages only. You can also receive notifications only on specific days or at specific times. See “Scheduling notifications” on page 7-19.

Note:

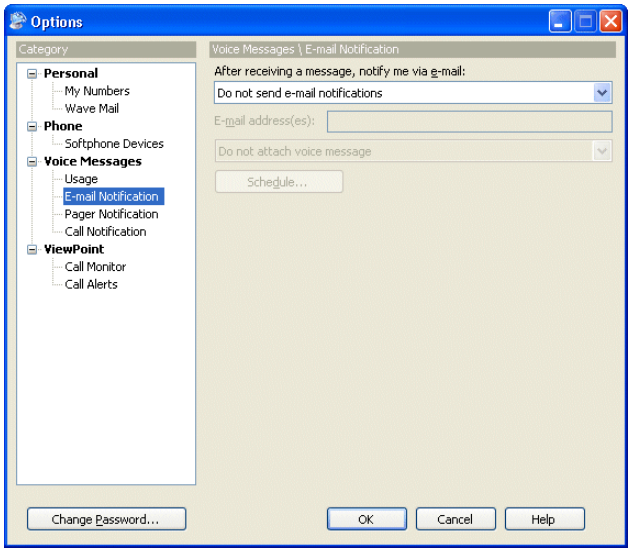
- For e-mail notification to work properly, the Wave ISM must be configured correctly. See your Wave system administrator if you encounter any problems.
- Notification is sent only for new voice messages, not new call recordings.

Setting up e-mail notification

E-mail notification messages include the caller's name (if available), the phone number at which the call originated, the extension at which the message was left, the message length, and any notes associated with the message. You can even have Wave attach the voice message itself to the e-mail as an audio file so that you can play it wherever you are.

To set up voice mail notification

1. Choose **Tools > Options**. The Options dialog opens.
2. Click the Voice Messages \ E-Mail Notification tab.



3. Select one of the following notification options on the drop-down list:
   - **Do not send e-mail notifications.** You do not receive e-mail notification of new voice messages.
   - **Send e-mail for all messages.** You receive an e-mail notification whenever you receive a new voice message.
   - **Send e-mail for Urgent messages only.** You receive an e-mail notification whenever you receive a voice message marked Urgent.
4. In the **E-mail address(es)** field, type one or more e-mail addresses to which you want Wave to send notifications. Separate addresses by semicolons.

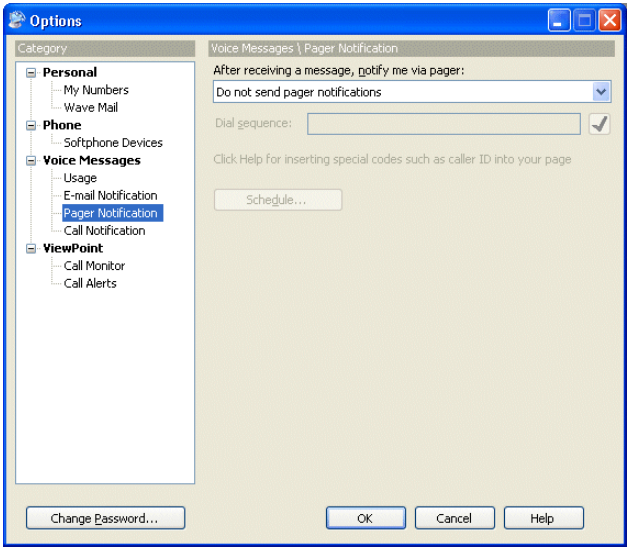
5. To instruct Wave whether to attach the voice message to the e-mail as a WAV file, select one of the following options on the drop-down list:
   - **Do not attach voice message.** Messages are not attached to the e-mail.
   - **Attach voice message.** Messages are attached to the e-mail and also appear in the Inbox folder marked as new (Unheard).
   - **Attach voice message and mark as heard.** Messages are attached to the e-mail and appear in the Inbox folder marked as old (heard).
   - **Attach voice message and delete from Inbox.** Messages are attached to the e-mail and are moved to the Deleted folder.
6. Click **OK**.

Setting up pager notification

Pager notifications can include the Caller ID of the voice message, the Wave extension that the caller dialed, and the length of the voice message.

To set up pager notification

1. Choose **Tools > Options**. The Options dialog opens.
2. Click the Voice Messages \ Pager Notification tab.



3. Select one of the following notification options on the drop-down list:
   - **Do not send pager notifications.** You do not receive pager notification of new voice messages.
   - **Send a page for all messages.** You receive a page whenever you receive a new voice message.
   - **Send a page for Urgent messages only.** You receive a page whenever you receive a voice message marked Urgent.
4. In the **Dial Sequence** field, enter the dial string for your pager, including the phone number of the paging service and your pager's PIN, if required. The dial string can contain any touch tone digit (0-9, *, #). You can enter commas to indicate 2-second pauses in the dial sequence.

   You can also use the following special characters to add information to the page:
   - I or i sends the Caller ID number (for an external call) or Wave extension (for an internal call).
   - E or e sends the Wave extension that the caller dialed.
   - L or l sends the length of the voice message in seconds.

   For example, the dial sequence `18007771000,,,1245983#E` causes Wave to dial your paging service, pause for 6 seconds, enter your pager's PIN (1245983) followed by # to indicate end-of-PIN, enter your extension (the extension at which the voice message was left), and then hang up. Your pager would display only the extension, 103 for example.
5. Click **OK**.

   Note:
   - If you receive only the last portion of the pager data that you specify, you may not have placed enough pauses between the pager number to be dialed and the information to send. If this problem occurs, add more commas to the **Dial Sequence** field.
   - Do not enter multiple stars (*) in a row in the pager string. Use only one star to send a dash. Multiple consecutive stars can terminate the page message.

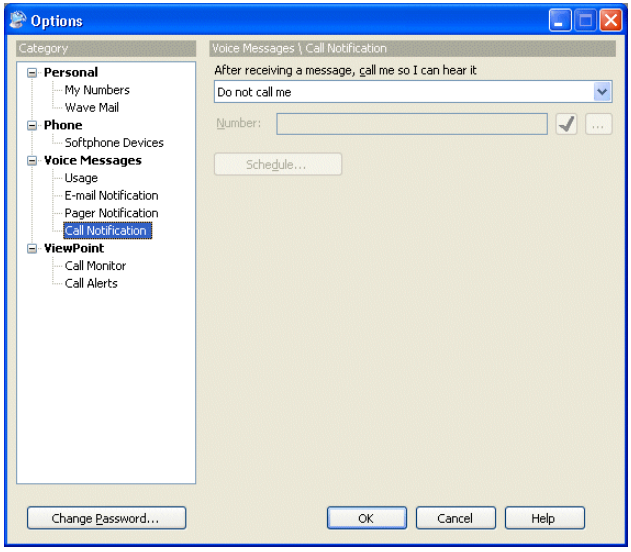
Setting up call notifications

Wave places notification calls to the number of your choice. The notification call says, "<voice title> has a new voice message from <caller's voice title if available>. Press # to hear your message." By pressing #, you can log onto the account and hear the new message, and even press **4 3** to call the person back.

Note: You can enter or change the phone number to which notification calls are sent using the phone commands. To do so, log on and press **6 4**. By logging on from a remote phone, you can have call notifications sent to wherever you are.

To set up call notification

1. Choose **Tools > Options**. The Options dialog opens.
2. Click the Voice Messages \ Call Notification tab.



3. Select one of the following notification options from the drop-down list:
   - **Do not place call notifications.** Calls are not placed for new voice messages.
   - **Place call for all messages.** A call is placed whenever a new voice message arrives.
   - **Place call for urgent messages only.** A call is placed whenever a voice message marked urgent arrives.
4. Enter the phone number to which notification calls are placed in the **Number** field. You can also click ... to open the Notify Me via Call dialog, where you can select the number to call (see "Using the Place Call To dialog" on page 6-3).
5. Click **OK**.

Scheduling notifications

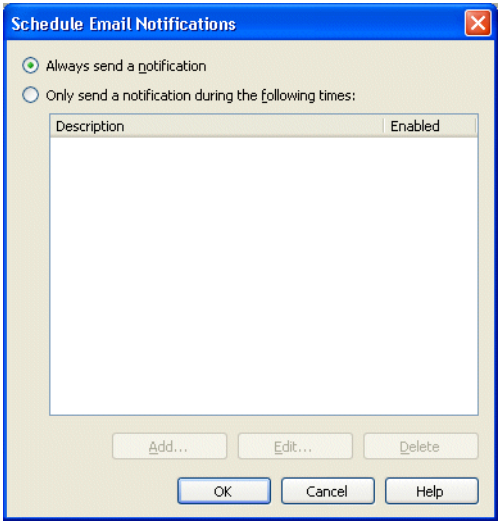
If you do not want to receive notifications 24 hours a day, 7 days a week, you can schedule notifications to occur at specific times only. For example, you can have Wave send notifications only during business hours or after business hours on work days. You can also set up custom hours. You can create different schedules for e-mail, pager, and call notification.

Note: Notifications are never queued for later delivery. When you use a schedule, voice messages that arrive during an unscheduled time do not produce notifications at all.

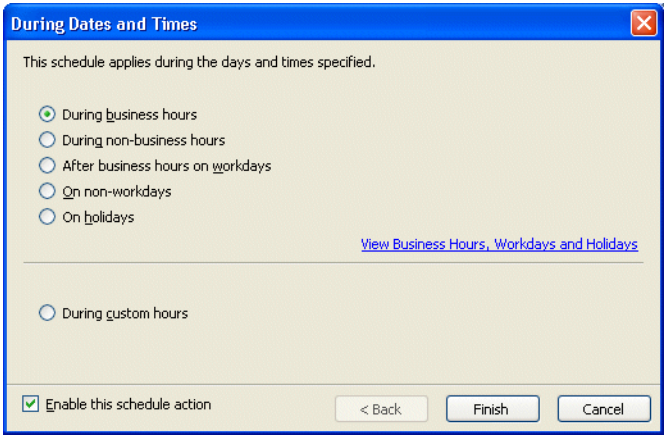
To schedule notifications

1. Choose **Tools > Options**. The Options dialog opens.
2. Under Voice Messages, choose the notification tab for the type of notification that you want to schedule (**E-mail Notification**, **Pager Notification**, or **Call Notification**).

3. Click **Schedule**. The Schedule Notifications dialog opens.



4. Click **Only send a notification during the following times**, and then click **Add**. The During Dates and Times Wizard dialog opens.



5. To base the notification times on your system's business hours, click one of the options in the top group. Click the link to view your system's schedule for business hours and holidays. After making your selection, click **Finish**.

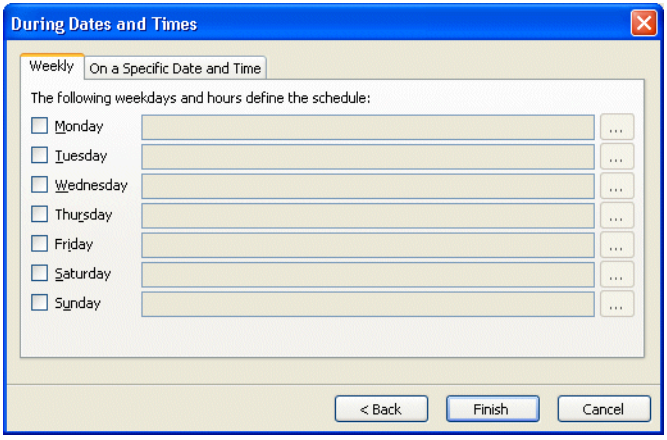
   To base notification times on another schedule, click **During custom hours**, then click **Next**. See the next section, "Specifying custom hours."

   Check **Enable this schedule action** to make this schedule action active. Unchecking it means that notifications will not be sent during the time frame specified in this schedule action.

Specifying custom hours

To specify custom hours

1. If you selected **During custom hours** as your schedule action, click **Next** on the During Dates and Times page to open the next Wizard page, where you can specify when the notification activates.

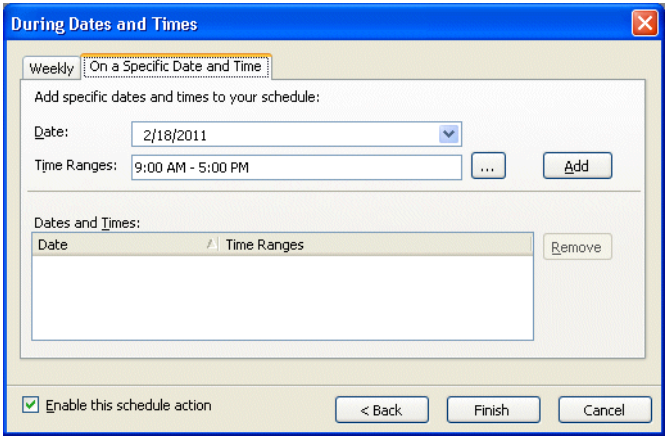


To have the notification activate on a daily or weekly basis

2. On the Weekly tab, check the days on which you the call rule to activate. The notification will activate every week on that day during the times specified.
3. To edit the active hours for a day, click the ... button for that day. You can also type in the hours using hyphens for a range and commas to separate multiple ranges. For example: 9:00 AM - 12:00 PM, 1:00 PM - 5:00 PM.
4. Click **Finish**.

To have the notification activate on one or more individual dates

5. Click the On a Specific Date and Time tab.



6. Enter or select a **Date** from the drop-down calendar control to specify when the notification will be active.
7. To edit the active hours for that date, click ... . You can also type in the hours using hyphens for a range and commas to separate multiple ranges. For example: 9:00 AM - 12:00 PM, 1:00 PM - 5:00 PM.

8. Click **Add** to add that date, with its selected hours, to the Dates and Times list.
9. Repeat steps 6 through 8 to add other dates to the Dates and Times list, if needed. The notification will activate on each date/time specified in the Dates and Times list.
10. To remove a date from the Dates and Times list, click it and click **Remove**.
11. Click **Finish** when done.

Managing voicemail greetings

Greetings are recorded messages that callers hear when they reach your voicemail. For example, “This is Steve. I’m not at my desk at the moment, but leave me a message and I’ll get back to you soon.”

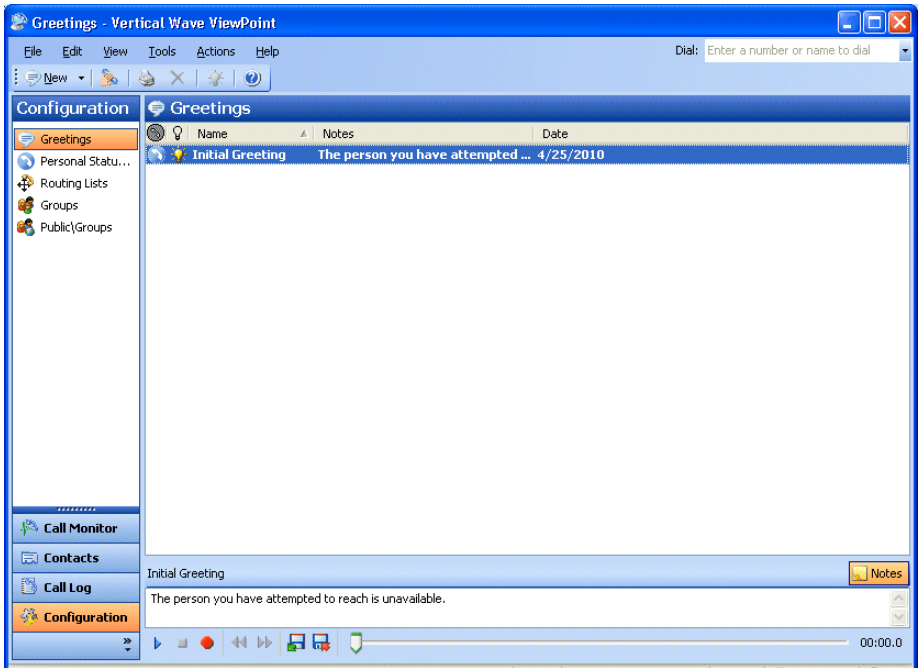
With Wave you can record and store multiple greetings and specify when you want Wave to use each one. For example, you can have a normal greeting for everyday use, another greeting for extended absences, and a third greeting for vacations. You can also create and use custom greetings for individual callers (see Chapter 11).

Space for greetings

You have a limited amount of disk space for greeting and voice title recordings. See your Wave system administrator to find out how much space has been allocated to you and how much you have used.

The Greetings folder

The Greetings folder lets you view and manage your greetings. To open the Greetings folder, click **Configuration** in the navigation bar, and then click **Greetings**.



The Greetings folder contains three sections:

- **The Greetings list.** Your existing greetings appear here.
- **The Notes Pane.** This pane displays the contents of the greeting. To hide or show the Notes Pane, choose **View > Notes Pane**.
- **The audio controls.** Use these controls to record a new greeting, import a greeting from disk, or rerecord a selected greeting. See “Using the audio controls” on page 2-36.

The personal status default greeting

This icon identifies the personal status greeting. The personal status default greeting is used by all personal statuses unless a specific personal status is configured to use a different greeting. (See “Modifying a personal status” on page 3-8.) Note that this column is called **Is Default** in the Show Columns dialog.

The active greeting

This icon identifies the greeting that Wave plays by default when callers reach your voicemail. Only one greeting at a time can be the active greeting. Callers may hear a greeting other than your active greeting if you specify a different greeting in a call rule, routing list, or personal status. Note that this column is called **Is Active** in the Show Columns dialog.

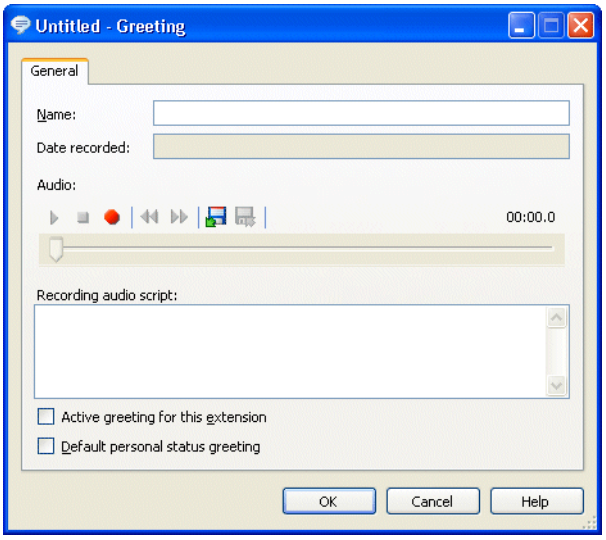
Greeting hierarchy

A routing list, a call rule, and your active greeting can all specify a different greeting to play when the caller reaches the final action of your routing list (usually the final action is your voicemail). In case of a conflict, the routing list’s greeting (if one is specified) overrides all other settings.

Recording a new greeting

To record a new greeting

1. Choose **File > New > Greeting**. The Greeting dialog opens.



2. Enter a **Name** for the greeting.
3. Record the greeting by using the audio controls. See “Using the audio controls” on page 2-36.
4. In the **Recording audio script** field, enter the greeting description, typically the text of the recorded greeting.
5. Select the **Active greeting for this extension** checkbox to make this the greeting that callers hear when they reach your voice mail. Other greetings will be played only if you reference them in a call rule, routing list, or a personal status.

6. Select the **Default personal status greeting** checkbox to make this greeting the default greeting used by all personal statuses unless a specific personal status is configured to use a different greeting.
7. Click **OK**.

To rerecord or edit an existing greeting, double-click the greeting in the Greetings folder and edit the greeting by using the audio controls.

E-mailing a greeting

You can e-mail a greeting as a WAV file attachment.

To e-mail a greeting

1. Select the greeting that you want to e-mail.
2. Choose **File > Send To**, and select the desired format for the **Mail Recipient**. Your MAPI mail ViewPoint Send dialog opens with the message attached.
3. Address and send the e-mail as you normally would.

Synchronizing Wave voice messages and contacts with your e-mail program

You can use Wave Mail to synchronize your voice messages and contacts between Wave and your e-mail program. Wave Mail allows you to:

- Receive, listen to, and manage your voice messages from either Wave or your e-mail program.
- Share and maintain a single set of contacts between Wave and your e-mail program.

Important: In this version, Wave Mail works with the following e-mail providers. You can use an e-mail program supported by these providers to access your shared voice messages and contacts, for example Microsoft Outlook.

- Microsoft Exchange 2007
- Microsoft Exchange 2010

How voice message synchronization works

This section describes the following:

- How voice message folders are used. See page 7-28.
- How you can listen to and act on synchronized voice messages. See page 7-29.
- About potential conflicts between Wave Mail and Exchange or Outlook rules. See page 7-29.

How voice message folders are used

After you enable Wave Mail according to the steps in this section, all of your existing Wave voice messages (New, Saved, and Deleted) are sent to your e-mail program and stored in the following folders:

Wave voice message status	E-mail program destination folder
New	Inbox
Saved	Wave Saved Messages
Deleted	Deleted Items

Wave Mail continues to monitor activity in these two sets of folders.

- After your voice messages are synchronized for the first time, all subsequent new Wave voice messages are automatically delivered to your e-mail Inbox folder as well.
- If you move a message between the folders on the Wave side, Wave Mail moves it accordingly on the Exchange side. Similarly, if you move a message between the folders on the Exchange side, Wave Mail moves it accordingly on the Wave side.
- Wave Mail maintains synchronization of the Heard/Unheard (Read/UnRead), Urgent/Normal, and Private/Normal message states in the folders on both sides.

- If you move a message to any other folder on the Exchange side, Wave Mail permanently deletes the message on the Wave side.
- If you rename the Wave Saved Messages folder, Wave Mail continue to use it with the new name.
- If you delete the Wave Saved Messages folder on the Exchange side, Wave Mail will re-create it automatically the next time it needs it to synchronize a message residing in the Saved folder on the Wave side.

How you can listen to and act on synchronized voice messages

With Wave Mail, you can listen to and manage your voice messages in any of the following ways:

- Via the phone, using the phone commands. See the *Wave Phone User Guide* for details.
- Via ViewPoint, as described earlier in this chapter.
- Via your e-mail program. See its documentation for details.

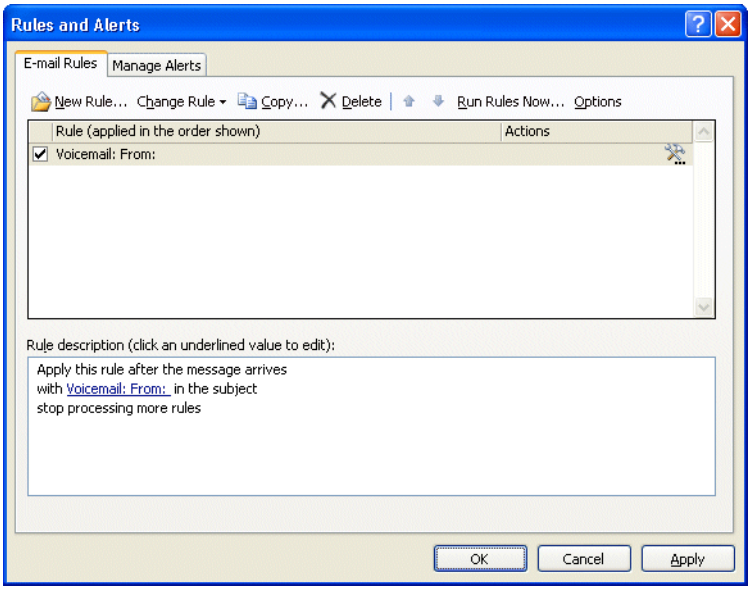
About potential conflicts between Wave Mail and Exchange or Outlook rules

If you have Exchange or Outlook rules for processing messages, it is possible that one or more rules may be executed on a message that interfere with the expected synchronization between Wave Mail and Exchange. For example, a rule might move a message to another folder, causing a voice message to be deleted before you have a chance to listen to it.

To avoid conflicts of this type

1. Define a new rule and make it the first rule to be executed before any other rules.
2. Configure that rule to identify incoming voice messages delivered to the user's Exchange Inbox by Wave Mail. For example, the rule could search for "Voicemail: From" in the message subject, or use other identification logic that applies to a particular user.

3. Add an action that if the rule identifies an incoming voice message delivered by Wave Mail, stop processing all other rules. For example, an Outlook rule might look like this:



How contact synchronization works

After you enable Wave Mail according to the steps in this section, all of your existing Wave contacts and your e-mail contacts are compared. Duplicate contacts are processed so that Wave and your e-mail program end up with a single set of matching contacts. (Duplicates are determined primarily by a name match, but address matching—phone numbers, e-mail addresses, and so forth—are also used to determine a match.) When you enable Wave Mail, you specify whether you want to use the information in your Wave contact or your e-mail contact to take precedence in case of a conflict.

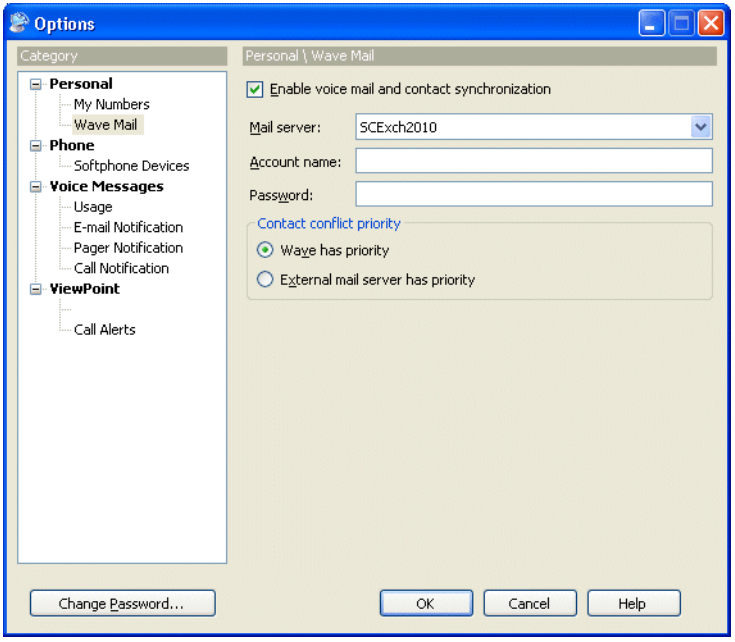
With Wave Mail, you can manage your contacts in ViewPoint or via your e-mail program. After your contacts are synchronized for the first time, Wave Mail monitors both contact lists for subsequent additions, changes, and deletions and updates Wave and your e-mail program as necessary to keep both contact lists synchronized.

Configuring your Wave Mail mailbox in ViewPoint

Important: Before you can begin synchronizing your voice messages and contacts between Wave and your e-mail program, your Wave system administrator must assign you the appropriate permission and configure your user account to use the feature. (If the settings described below are disabled, this has not yet occurred.) Either your Wave system administrator or you then need to perform the following steps to configure your Wave mailbox. If you perform these steps in ViewPoint as described below, your Wave system administrator can tell you what information you need to enter here.

To enable Wave Mail and configure your Wave Mail mailbox

1. Choose **Tools > Options**. The Options dialog opens.
2. Click the Personal \ Wave Mail tab.
3. Select the **Enable voice mail and contact synchronization** checkbox.



4. Select the name of your Exchange **Mail server** from the drop-down list.
5. Enter the **Account name** of your e-mail provider.
6. Enter the **Password** for your e-mail provider's account.
7. Select one of the following **Contact conflict priority** settings. This setting determines which contact takes precedence if similar contacts exist in Wave and your e-mail program.
   - **Wave has priority.** The Wave contact information will be propagated to your e-mail program.
   - **External mail server has priority.** The e-mail contact information will be propagated to Wave.
8. Click **OK**.

Using the Call Log Folder

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The Call Log folder

The Call Log folder contains a record of all incoming and outgoing phone calls associated with your extension. Internal calls (calls between Wave users) may or may not be logged, depending on how your Wave system administrator set up the system.

To open the Call Log folder, click its entry in the navigation bar.

Call Log folder filters

The Call Log folder toolbar contains the following drop-down lists that enable you to view only the calls you want.

Use either or both of the following:

- **Time filter.** View the most recent calls according to the time frame you select. The time frame begins at midnight for the range selected; for example, “1 day” shows calls since midnight of the current day, and “1 month” shows calls since midnight of this date last month.
- **Inbound/outbound filter.** View only inbound calls, only outbound calls, or both.

Call Log folder columns

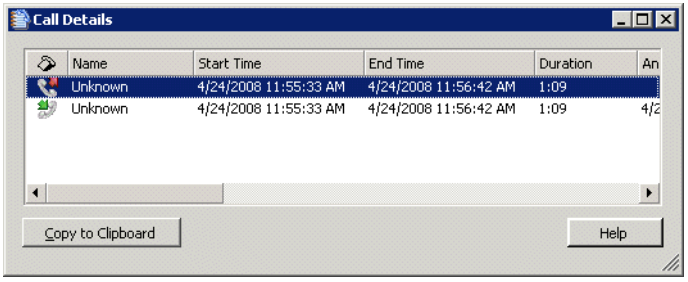
Press F1 to see a description of the columns available in the Call Log. Many columns are hidden by default.

You can view more information for a call in the following ways:

- Double-click a call to view it in the Call Details dialog, in which more columns are displayed. See the next section.
- Add more columns to the Call Log folder itself. See “Customizing columns” on page 12-20.

Viewing call details

You can view more information about your calls by double-clicking a call in the Call Log folder. The Call Details dialog opens.



The Call Details dialog displays a separate line for each party in the call.

Note: The Call Details dialog shows current information about the parties in the call, while the Call Log folder shows the information as it was at the time of the call. Therefore the two can sometimes be different, for example, if the call was from a contact and you changed the contact’s name since the time of the call.

Call Details Columns

Column	Description
	Indicates the incoming and outgoing components of the call, respectively.
Name	Name of the parties in the call. On incoming calls, “Unknown” appears unless the user identified the caller as a contact. On outgoing calls, the user’s name appears.
Start Time	Date and time that each party began participating in the call.
End Time	Date and time that each party left the call.
Duration	Duration of the call.
Answered Time	Date and time that the call was answered.
Answered By	Name of the users for whom this was an incoming call.
Account Code	Account code associated with the call, if any. See “Entering an account code for a Call Log entry” on page 8-8.
Number	On incoming lines, Caller ID name and number, if available. On outgoing lines, the number dialed. On a call to or from another Wave user, this field contains <NA>.
Number Type	The type of number displayed in the Number column. Types are: **Phone:** External phone number **Internet:** Internet or IP network address **Extension:** Internal extension
Access Code	On outgoing calls and incoming calls over an IP gateway, the access code of the dialing service used to place the call.

Call Details Columns ***(continued)***

Column	Description
DID	On incoming lines, your Direct Inward Dial number if the caller used it to call you. DID is not applicable for outgoing lines.
Device	On incoming lines, the trunk or station number at which the call was placed. On outgoing lines, your station number.
Dial String	Digits that Wave actually dialed over the trunk, which can be different than the digits Wave displays in a contact's phone number. For example, a dial string can contain an international or long-distance access code, least-cost routing information, or dialing prefix or suffix.
Left Message	A check in this field indicates that the caller left a voice message.
Result	How the call ended. The possible outcomes are: **Abandoned**. Caller hung up before the call was answered. **Connected**. Caller was connected to a party. **To voice mail**. Caller went to voice mail, but did not necessarily leave a message. **Blind transfer**. A blind transfer sent the caller to another party. See note below. **Supervised transfer**. A supervised transfer sent the caller to another party. See note below. **Login**. Caller logged in to a valid Wave user account. **Login failed:** Caller attempted to log in to a Wave user account, but failed to enter a valid password within the maximum number of retries allowed. **No Answer**. Outbound call was not answered. **Unknown**. Wave was unable to identify the outcome of the call.

Call Details Columns ***(continued)***

Column	Description
	A call result of “Blind transfer” or “Supervised transfer” is displayed in a user’s Call Log only if the *calling user* performs the transfer, not the called user. For example: If user A calls user B, and then user A transfers the call to user C, user A’s Call Log displays a “Transfer” result for the call. If user A calls user B, and then user B transfers the call to user C, user A’s Call Log displays the call’s result as “Connected”, and user B’s Call Log displays a “Transfer” result. See “Blind, supervised, and direct-to-voicemail transfers” on page 5-11 for a description of the different types of call transfer.
Custom Data	Custom data, if any, associated with the call. Custom data can be collected by IVR Plug-ins or Contact Center queues that prompt the caller for information.

Taking notes on a Call Log entry

By clicking **Notes** in the bottom pane, you can take notes on a Call Log entry. Notes can help you identify a call in the list or summarize important information about a call.

To take notes on a Call Log entry, select the entry, click in the Notes Pane, and then type your notes. When you are done, you can press **Enter** or click your mouse anywhere. The notes you just created appear in the Notes column for that Call Log entry. You can enter up to 2000 character in the **Notes** field.

Sending an email message about a Call Log entry

You can create an email message from a Call Log entry that’s automatically preformatted with call details. This can be useful for receptionists who sometimes need to send written messages about a call.

To create an email from the Call Log, select a call and choose **Actions > Send To**. A new email message opens preformatted with call details. You can add optional notes or other information before sending the email.

Associating a call from “Unknown” with a contact

When a Call Log entry appears from “Unknown,” it means that Wave was unable to identify the caller as a Wave contact or user. You can associate the call with a contact, so that the correct name displays and Wave identifies the contact on subsequent calls from that phone.

See “Associating a call or Caller ID number with a contact” on page 10-11 for complete instructions.

Returning a call in the Call Log

To return a call in the Call Log

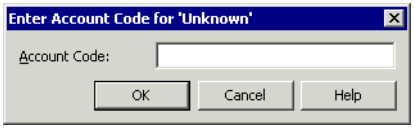
1. Select the call in the Call Log folder that you want to return.
2. On the **Actions** menu, choose one of the following:
   - **Place Call.** This command lets you choose the number to dial from a submenu. If the caller is a contact, you can choose the phone number to call from the list of the contact’s phone numbers. You can also choose to call by using the Caller ID number of the call.
   - **Speed Dial.** This command places a call immediately to a user’s extension, a contact’s default number, or an unknown caller’s Caller ID number. You can also choose Speed Dial by double-clicking the call.
3. Click **OK**. Wave dials the number.

Entering an account code for a Call Log entry

You can enter an account code or change the one already entered for a call in the Call Log. You must have permission to view and edit the Call Log to enter or change account codes.

To enter an account code for a Call Log entry

1. Select the call, and then choose **Actions > Enter Account Code**.



2. Enter an account code. You can enter numbers, letters, or other characters.
3. Click **OK**.

You can also enter an account code during a call using ViewPoint (see “Entering an account code for a call” on page 5-17) or the phone commands.

Opening the contact record from a contact’s call

If a call was identified as being from a contact, you can open the contact’s record to view or change information about that contact. To do so, select the call and choose **Actions > Open Contact**.

Sharing the Call Log

Your Wave system administrator may have shared other users’ Call Logs with you. If so, your Call Log will contain a tab for each share, where you can view the other users’ call history. Likewise, your Call Log may be shared with other users. To change Call Log sharing, talk to your Wave system administrator. For more about folder sharing, see “Sharing folders” on page 2-35.

Reporting on the Call Log

If you want to create reports based on the contents of your Call Log, you can run the Wave Contact Center Reporter by choosing **Tools > Reports**. In order to use the Contact Center Reporter, you must have permission to do so and it must be licensed on your system.

For help about a particular report, click Help on the Contact Center Reporter toolbar in Excel, or choose Help in the Contact Center Reporter dialog. See your Wave system administrator for more about using the Contact Center Reporter.

Call Forwarding and Routing Lists

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About call forwarding and routing lists

Vertical Wave provides two ways of receiving your calls at a phone other than your own, ensuring that you do not miss important calls when you are away from your desk:

- **Call forwarding**. You send your incoming calls to ring at another phone. You can forward to another extension or an external number (for example, your home phone number). Click **Tools > Call Forwarding** to forward your calls to another number (see “Forwarding calls” on page 9-2).

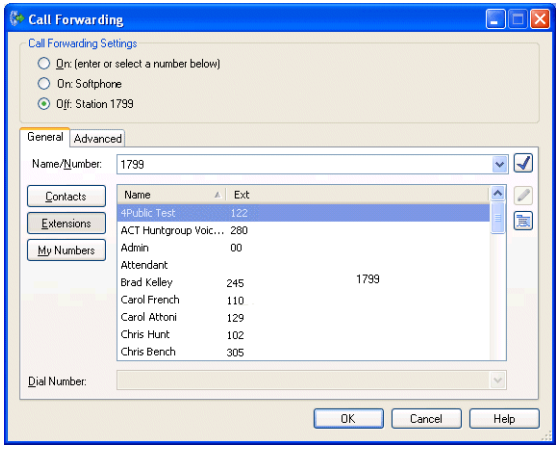
  Note: By default, when you forward your calls to a remote phone, the forwarded calls do not appear in the ViewPoint Call Monitor and you cannot use ViewPoint call handling features on the calls. Your Wave administrator can optionally configure your account so that these calls appear in the ViewPoint Call Monitor.

- **Routing lists**. Your incoming calls try a series of phone numbers until you answer at one of them. You can also specify how your calls are handled when you are on the phone or do not answer. Open the Routing Lists folder to create routing lists (see “Using routing lists” on page 9-5).

Forwarding calls

To turn call forwarding on:

1. Choose **Tools > Call Forwarding**. The Call Forwarding dialog opens.



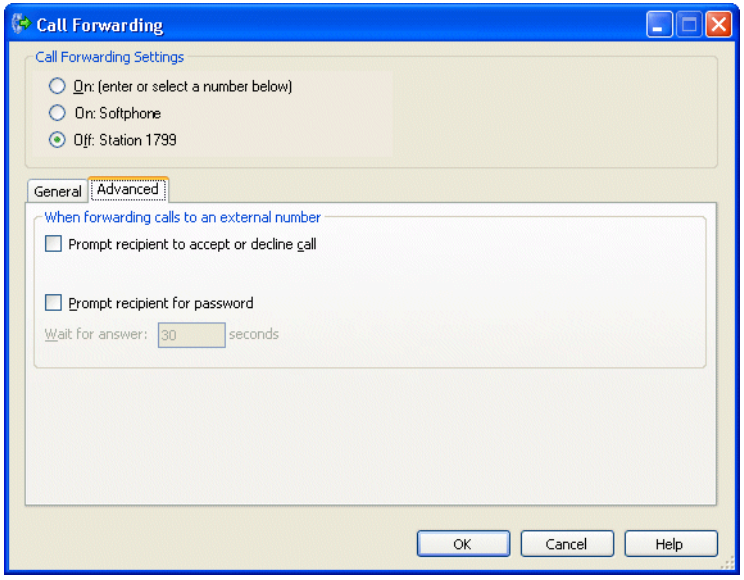
2. Do one of the following:
   - Click **On: (enter or select a number below)** to forward your calls to a specific number.
   - Click **On: Softphone** to forward your calls to your softphone. (This option is only available if you selected **Integrated Secondary Softphone** when you logged on to ViewPoint.)
3. Enter or select the number to dial in one of the following ways:
   - Enter the number to which calls are forwarded in the **Name/Number** field. You can also type the name of a contact or user.
   - Click **Extensions** and select an extension on the list. You can also select an auto attendant, IVR Plug-in, or Group.
   - Click **Contacts** and select a contact on the list. The contact's default phone number appears in the drop-down list below the main list. If the contact has more than one phone number associated with it, you can select a different number on the drop-down list.

- To create a new contact, click to open a new Contact dialog. To edit the currently selected contact, press Alt and click . See “Entering a new contact” on page 10-5 for more information.
- To forward your calls to one of your own phone numbers, such as your home or mobile phone, click **My Numbers** and select it on the list. To edit your My Numbers list, click . See “Entering My Numbers” on page 6-5.

4. To enter an account code that will automatically be associated with all calls forwarded to this number, type a vertical bar character (|) after the number, followed by the account code.

   At this point most users can click **OK** to complete call forwarding. The following step is for advanced Wave users.

5. To set other call forwarding options, click the Advanced tab.



You can set any of the following options:

- **Prompt recipient to accept or decline call.** If checked, when you pick up the phone at an external number, Wave announces the caller ("Call from") and intended recipient ("Call for <your voice title>") and asks you to accept or decline the call. Unaccepted calls proceed to the next action in your routing list, usually your voicemail.

  You can use this checkbox to have all your unanswered calls go to your Wave voicemail, rather than voicemail active at your forwarded number(s).

  The call prompts loop, so you might not hear it from the beginning when you pick up the phone. Press any key on your phone other than 1 or 2 to restart the prompt at the beginning.

  Note: This option is used only when forwarding calls to an external number.

- **Prompt recipient for password.** If checked, the person who picks up the phone hears, "Call for <your voice title>. Please connect me." To be connected to the caller, you must enter your Wave password. Entering a password ensures that only you can receive your forwarded calls. This is useful when forwarding calls to a hotel or a company with an operator.

  Note: This option works only when calls are forwarded to an external number and when you have a voice title for yourself recorded. If you have not recorded a voice title, Wave ignores your selection of this option. For more about how to record your voice title, see page 12-4.

- **Wait for answer.** Enter the length of time in seconds that you want a call to ring the forwarding number before going to proceeding to the next action on your routing list (usually your voicemail). If you are using the option **Prompt recipient for password** (described below) or **Prompt recipient to accept or decline call** (described later in this step), you should enter at least 30 seconds. If you enter less time, the call might be sent to your voicemail before you finish listening and responding to the prompts.

6. Click **OK**.

Turning forwarding on and off via the FWD button

When your calls are forwarded, the FWD button in the status bar appears with an active forwarding icon

. Click the button to open the Call Forwarding dialog to turn call forwarding on or off or make other changes. Click the down arrow on the FWD button to turn call forwarding off, or choose a different forwarding number.

Call forwarding and voicemail

If no one answers at your call forwarding location, the call is sent to your voicemail (unless you have specified a different behavior using a routing list or call rule).

Using routing lists

A *routing list* is a series of phone numbers that Wave dials when calls for you arrive. If you do not answer at one location, Wave proceeds to the next. For example, you can set up a routing list that tries you at your desk, then at your home, and finally at your mobile phone.

A routing list ends with a final action that determines what happens if no one answers. Usually the caller is sent to your voicemail, but you can specify other final actions. For example, you can transfer calls to another extension, put callers on hold and try the series of numbers again, or hang up.

You can specify a different final action for when you're on the phone vs. when you're away from your desk. For example, if your phone is busy you can play a voicemail greeting such as "I'm sorry I'm on the phone, please leave a message and I'll return your call as soon as possible."

You can create as many routing lists as you want and make any one of them the active routing list at any time.

Call center queue calls sent to agents do not follow the agents' routing lists. See the *Wave Contact Center Administrator Guide* for details.

Keeping calls from “sticking” at voicemail in a series of external numbers

If you have a routing list that tries to reach you at a series of external numbers, you don’t want calls at an unanswered step to be “answered” by voicemail there. To avoid this, make sure that **Prompt recipient to accept or decline call** is checked for each routing list step. (See “Creating a routing list using the Routing List Editor” on page 9-11 for instructions.) With this setting, unless the call is actively accepted, it continues down your routing list.

Routing lists for individual callers

By using call rules, you can have Wave use a specific routing list for a specific caller or group of callers. For example, you can have a routing list for important customers that includes trying your mobile phone and another routing list for everyone else that only rings your extension. See Chapter 11 for more information.

Caller options while following a routing list

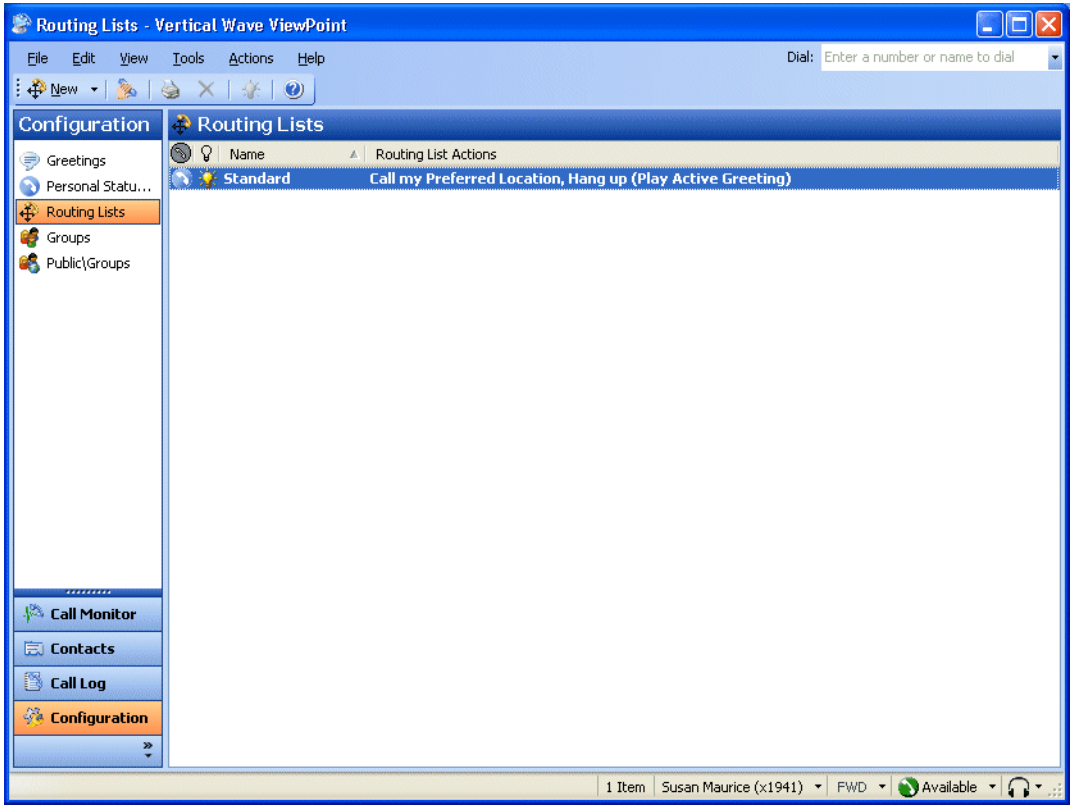
When a routing list moves to the next action, Wave can alert the caller and offer the following choices:

- Press 1 or stay on the line to try the next number.
- Press 2 to leave a voice message.
- Press 3 to return to the auto attendant.
- Press 0 to transfer to the Operator. If you have defined a personal Operator, the call is transferred to that extension. If you have not defined a personal Operator, the call is transferred to your office’s Operator extension.

You can specify whether Wave offers these choices for each action in the routing list. See “Creating a routing list using the Routing List Editor” on page 9-11.

The Routing Lists folder

The Routing Lists folder lets you view and manage your routing lists.



The default routing list

This icon identifies the default personal status routing. The default personal status routing list is used by all personal statuses unless a specific personal status is configured to use a different routing list. (See “Modifying a personal status” on page 3-8.) Note that this column is called **Is Default** in the Show Columns dialog.

The active routing list

This icon identifies the routing list that all incoming calls follow. Calls can follow another routing list if you have created call rules for them (see Chapter 11). Only one routing list at a time can be the active routing list, and you cannot delete the active routing list. Note that this column is called **Is Active** in the Show Columns dialog.

The Standard routing list

The Standard routing list is the default routing list that is built into Wave. It consists of one action: trying you at your Preferred Location. (See “Call Forwarding and Routing Lists” on page 9-1.) If you are busy or do not answer, the routing list sends the caller to voicemail.

You cannot edit the Standard routing list. To have calls follow a different route, you must create a new routing list and make it the active routing list.

To make a routing list the active and default routing list:

1. Right-click the routing list that you want to make the active routing list.
2. Choose **Actions > Set as Default and Active**.

Using the Routing List Wizard vs. the Routing List Editor

When you create a new routing list, Wave offers two ways of proceeding:

- **Routing List Wizard**. For new users. The Wizard provides a simple interface to guide you through the creation process.
- **Routing List Editor**. For advanced users. The editor gives you access to the full range of routing list editing options.

Setting a default routing list method

To skip the Welcome to the Routing List Wizard dialog when creating subsequent routing lists, select the **Do not prompt me again** checkbox. Whichever choice you made will automatically recur for subsequent routing lists.

To change your choice or reactivate the Welcome to the Routing List Wizard dialog, choose **Tools > Options**, go to the ViewPoint tab, and select one of the following in **New routing lists**:

- **Use the Wizard**. The Routing List Wizard starts and guides you step-by-step through the process of creating a routing list. This method is recommended for new users.
- **Use the Editor**. The Routing List dialog opens, where you can quickly set up all features of a new routing list. This method is recommended for experienced users.
- **Prompt me to use the Wizard or Editor**. ViewPoint prompts you each time to choose between the Wizard and the Editor. (Select this option to restore the prompt shown above if you have skipped it.)

Creating a routing list using the Routing List Wizard

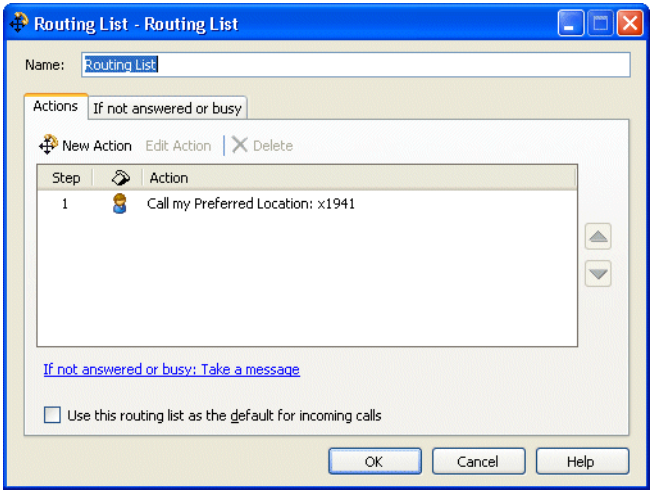
1. Choose **File > New > Routing List**. If prompted to choose between the Wizard and the Editor, choose **Routing List Wizard**.
2. Follow the on-screen prompts to create the type of routing list you want. For each Wizard page, you can press F1 for online Help.

When you create a routing list using the Wizard that routes calls to an external number, the routing list uses the advanced settings (**Prompt recipient for password**, **Prompt recipient to accept or decline call**, **Wait for answer**) that you have specified for call forwarding. See “Forwarding calls” on page 9-2.

Creating a routing list using the Routing List Editor

To create a routing list using the Editor

1. Choose **File > New > Routing List**. If prompted to choose between the Wizard and the Editor, choose **Routing List Editor**. The Routing List dialog opens.

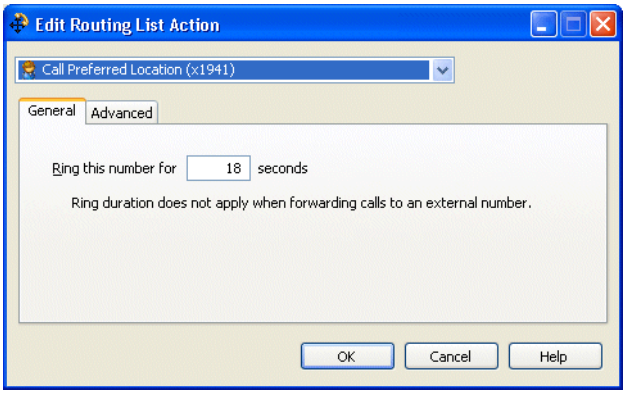


   The Actions tab shows the actions of your routing list in the order that they will be performed. You can reorder the actions by dragging-and-dropping or clicking the arrow buttons.

2. Enter a name for the routing list in the **Name** field.

3. To make this routing list the personal status default, check **Use this routing list as the default for incoming calls**. When this checkbox is selected, the this routing list is used by all personal statuses unless a specific personal status is configured to use a different routing list. (See “Modifying a personal status” on page 3-6.)

4. Click **New Action** to add a routing list action. The Edit Routing List Action dialog opens.



5. From the drop-down list, choose one of the following actions. The other elements in the dialog change depending on your selection.

   - **Call Preferred Location.** This action sends calls to your Preferred Location phone, which is your station unless you have changed it (see "Call Forwarding and Routing Lists" on page 9-1).
     - **Ring this number for __ seconds**. Specify the length of time the phone should ring when calling this location.
   - **Call Another Location.** This action directs calls to the internal or external number that you specify.
     - **Number**. Enter the number to call. To specify an internal number, enter an extension or a Wave user's name.
       - Click ✓ to open the Check Phone Number dialog to confirm that Wave can correctly interpret the number or address that you entered. See "Checking a number" on page 6-8.
       - Click … to open the Call Me at Another Location dialog to specify a contact, extension or other number. (The fields on this dialog are the same as on the Place Call To dialog. See "Using the Place Call To dialog" on page 6-3 for details.)

Note: Calls routed to another extension do not follow call forwarding or routing lists in effect at that extension. To send calls to another extension so that they follow that extension's forwarding or routing list, use a final routing list action of **Transfer To extension**.

You cannot route calls to an auto attendant or call center queue as a routing list action, but you can do so by using a final action of **Transfer To extension**.

- **Call Group.** This action directs calls to one or all members of the Group that you specify. For more about calling a Group, see "Routing calls to groups" on page 9-18.
  - **Call Group**. Select the Group to call. Click to create a new Group.
  - **Method**. Select one of the following ways to ring the Group's phones:
    - **Individually in a round robin.** The call tries each user or contact in the Group in order until it is answered, starting with the next member in line after the one who answered the preceding call.
    - **Sequentially from the top down.** The call tries each user or contact in the Group in order until it is answered, starting with the first.
    - **Simultaneously.** The default numbers or Preferred Locations of all users and contacts in the Group ring simultaneously, and the call goes to the first who accepts it.
  - **Ring this group for __ seconds**. Specify the length of time each Group phone should ring before the call tries the next phone in the Group.

  Note: If you create a public ViewPoint group and give it an extension (making it a dialable Voicemail distribution group), the ViewPoint group no longer appears in the Call Group drop-down list. This is functioning as designed—groups with extensions are filtered out from any workflow that would make them dialable.

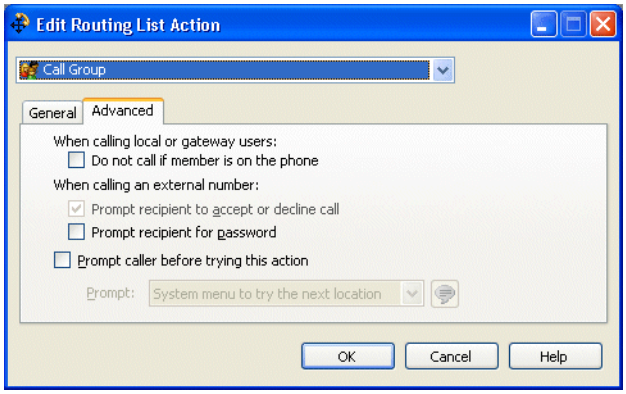
- **Play greeting.** This action does not ring a phone, but instead plays the caller the greeting that you select from the **Greeting** drop-down list. You can also play a greeting as part of each action and before the final action. To record a new greeting from this dialog, click . See "Recording a new greeting" on page 7-26.

  While any greeting is playing, the caller can press 0 to transfer to the Operator or 1 to leave a voice message. You might want your greeting to mention these options.

6. Click the Advanced tab to set additional options relating to the chosen action. See the next section, “Using the Advanced tab.”
7. Click **OK** to add this action to your routing list. The Routing List Action dialog closes, and the new action appears on the Actions tab of the Routing List dialog.

Using the Advanced tab

Click the Advanced tab of the Routing List Action dialog to set additional options related to the action you’ve chosen. Depending on the action selected, not all of the following options may appear. (There is no Advanced tab if you specified the action **Play greeting** on the General tab.)



- **When calling local or gateway users:**
  - **Do not call if member is on the phone.** When this option is checked, calls sent to a ViewPoint Group by the routing list will not be offered to any Group member who is off-hook or in Do Not Disturb mode.

    Note: This option is available only if you selected the action **Call Group** on the General tab.
- **When calling an external number:**
  - **Prompt recipient to accept or decline call.** Wave announces the caller (“Call from”) and the intended recipient (“Call for”), and offers the option to accept or decline the call. Declined calls proceed to the next routing list action.

    With this option checked, the call will not be connected unless someone presses **1** to accept it. For this reason, leave the field unchecked when routing to a pager.

- **Prompt recipient for password.** The person who answers the phone hears, “Call for <your voice title>. Please connect me.” To be connected to the caller, you must enter your Wave password. Using this option ensures that only you can receive your calls at the external phone number.

  Note: This option is available only if you have recorded a voice title. See “Recording your voice title” on page 12-4 for more information.

- **When calling a Group:**
  - **Do not call if member is on the phone.** When this option is selected, calls sent to a ViewPoint Group by the routing list will not be offered to any Group member who is off-hook or in Do Not Disturb mode.
  - **Prompt recipient for password** applies only to external numbers in the Group.
  - **Prompt recipient to accept or decline call** is automatically selected when calling a Group.

  For more about calling a Group in a routing list action, see “Routing calls to groups” on page 9-18.

- **Prompt caller before trying this action.** This option is available for a “Call Preferred Location”, “Call Another Location”, or “Call Group” action. Select this checkbox to play the caller a message before the routing list tries this action. Select the message to play from the drop-down list. You can select one of your greetings or **System menu to try the next location**, which says “There was no answer at that location. To try the next location, press 1. To leave a message, press 2. To return to the main menu, press 3.” Click to create a new greeting.

Handling calls differently if you do not answer or are busy

When you have finished creating the routing list’s actions, click the If not answered or busy tab of the Routing List dialog, to set the routing list’s final action. Final actions are performed on calls that are still unanswered after trying all the actions.

Note: To specify different final actions for busy and no-answer states, see the next section, “Handling busy station calls differently than calls not answered.”

To specify a final action, make the following choices

- **Play Greeting.** Check to play a greeting before the final action, then choose the greeting from the drop-down list. For information about the System hold greeting, see the **Pause and repeat** final action in the following list.

  Important: Under most circumstances you should select this check box and select **Active** as the greeting. For information, see "Using greetings with routing list final actions" on page 9-20.

- **Action.** Select the final action from the drop-down list. The following table describes the possible final actions.

Final Action	Description
Take a message.	The call is sent to your voicemail.
Hang up.	The call is disconnected.
Prompt to hang up.	Internal callers are disconnected. External callers are prompted to choose to end the call or to stay on the line for more options. Callers who want more options are transferred back to your company's auto attendant if one exists.
Transfer to extension.	The call is transferred to an extension that you select on the **Extension** drop-down list, for example, an operator, a coworker who handles your calls, or an auto attendant. The transferred call is treated as a new call to that extension. If no one answers at that extension, the call follows that extension's routing list.
Transfer to external number.	The call is transferred to the external number that you enter in the **Number** field.
Transfer to other voicemail.	The call is sent directly to another extension's voicemail. Select an extension from the **Mailbox** drop-down list.

Final Action	Description
Pause and repeat.	The caller holds for the number of seconds you define in the **Pause duration** field, and then begins the routing list again. During the pause, callers can press 0 for the operator or 1 to leave a voice message. The greeting you choose can mention these options. The special prerecorded greeting called the System Hold Greeting says, “The person you are calling is unavailable. To hold, please stay on the line. To leave a message, press 1.” It does not mention the option to press 0 for the operator.

Handling busy station calls differently than calls not answered

You can optionally specify two final actions—one for situations when your station is busy, one for situations when each action rings and goes unanswered. This allows you to handle calls differently when you’re on a call vs. when you’re away from your phone(s). For example, you can have a special greeting that plays when you’re on a call, that says, “I'm on the phone right now, please leave a message.”

To use this feature, check **Handle busy calls differently**, and specify a final action for when your line is busy. See the next section for additional information. If unchecked, the one final action is used in both situations.

Note: Wave can detect a routing list action as “busy” only when it is a Wave station. External numbers and Groups cannot trigger the “busy” final action.

Using “Handle Busy Calls Differently”

When you check **Handle busy calls differently**, the action you pick behaves differently from a normal final action. As soon as the routing list encounters a busy station, the final action triggers, skipping any subsequent actions. For example, if you have one action that tries your office station and a second that tries your cell phone, with **Handle busy calls differently** set to “Take a message,” and a call comes in while your station is busy, the call is sent to your voicemail without trying your cell phone.

Note: If while you are on the phone you receive an incoming call on an available line appearance (for example, with call waiting or on a digital phone with multiple primary line appearances), the call goes to the "Final action if the station is busy" after the ring duration expires for your phone.

Routing calls to groups

A routing list action can send a call to Group by using the action **Call Group**. The first person in the Group to answer the call is connected to the caller.

See "Creating a Group" on page 10-19 for instructions on creating a Group.

When a routing list calls a Group, the only numbers called are contacts' default numbers and users' extensions. Note that users' call forwarding settings are not followed. If you want to call a group that includes two numbers for one person (for instance, your desk phone and your cell phone), you must define two members of the Group, for example, yourself as a user and yourself as a contact at your cell phone number.

Note: Contact Center queue and auto attendant extensions in a Group are not processed by a routing list the same way that user extensions and contacts are processed. If a routing list step calls a Group and the next member in the Group is a queue or auto attendant, processing stops and the call is sent to the voice mailbox of the current step. For this reason, you may want to reorder the members of a Group in order to maximize the chances for a call to be answered. For example, if your routing list processes calls using the Sequentially from the top down method, consider moving non-user extensions to the bottom of the list. See "Creating a Group" on page 10-19.

To route calls to a Group as an action in an existing routing list

1. Double-click the routing list in the Routing Lists folder. The Routing List dialog for that routing list opens.
2. Click **Add**. The Routing List Action dialog opens.
3. In the **Action** field, select **Call a Group**.
4. Select a **Group** or click to create a new Group.

   Note: Your system administrator may have defined a limit to the number of contacts in a group that is called by a routing list. If you are unable to select a large group, talk to your system administrator.

5. Under **Method**, choose one of the following ways to ring the Group's phones:
   - **Sequentially from the top down.** The call tries each user or contact in the Group in order until it is answered, starting with the first.
   - **Individually in a round robin.** The call tries each user or contact in the Group in order until it is answered, starting with the next member in line after the one who answered the preceding call.
   - **Simultaneously.** The default numbers or Preferred Locations of all users and contacts in the Group ring simultaneously, and the call goes to the first who accepts it.
6. In the **Ring this group for __ seconds** field, specify the length of time each Group phone should ring before the call tries the next phone in the Group.
7. Use the Advanced tab for further options:
   - **Do not call if member is on the phone** applies only if the action is **Call Group**. When you select this option, calls sent to the group by a routing list will not be offered to any Group member who is off-hook or in Do Not Disturb mode.
   - **Prompt recipient for password** applies only to external numbers in the Group.
   - **Prompt recipient to accept or decline call** is automatically selected when calling a Group.
8. Click **OK**. You return to the Routing List dialog, in which the new routing list action appears in the **Actions** list.
9. Use the arrows next to the **Actions** list to reorder any actions in the routing list and then click **OK**.

Note: When routing calls to a Group, you also can use the **Pause and repeat** final action. This action keeps callers on hold until a member of the Group answers the call. Calls are answered in the order of longest hold time, or "first in, first out" (FIFO).

Using greetings with routing list final actions

For most routing lists, you should check **Play greeting** before the final action and select **Active**. This ensures that callers who reach the routing list's final action (for example, your voicemail) hear a greeting. It also allows the greeting to change based on your other settings. For example, you can use a call rule to play a different greeting when your friend Jim calls (see Chapter 11).

If you select a specific greeting under **Play greeting**, that greeting overrides the active greeting and plays to all callers who reach the final action of the routing list, even if a different greeting is specified in a call rule or personal status.

If you clear the **Play greeting** checkbox, no greeting plays to callers who reach the final action of this routing list, even if a greeting is specified in a call rule. If the final action is Take a Message, callers who reach your voicemail hear only the beep that signals that recording has begun.

When to use a specific greeting with a routing list

It is highly recommended that you select a specific greeting to play if your routing list's final action is not 'Take a Message." In such a case, you want to be sure that the greeting that callers hear matches the action that is about to happen. Examples of greetings for other final actions are the following:

- **Hang Up.** "I'm sorry you couldn't find me. I'm not taking messages at the moment. Good-bye."
- **Transfer to extension.** "I'm sorry you couldn't find me. I'm transferring you now to my administrative assistant."
- **Pause and repeat.** "The person you are calling is unavailable. To hold, please stay on the line. To leave a message, press 1." This is the text of the System Hold Greeting, a greeting provided with Wave for just this circumstance. You can also record your own version. See "Recording a new greeting" on page 7-26.

Managing Contacts and Groups

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About contact management and Wave

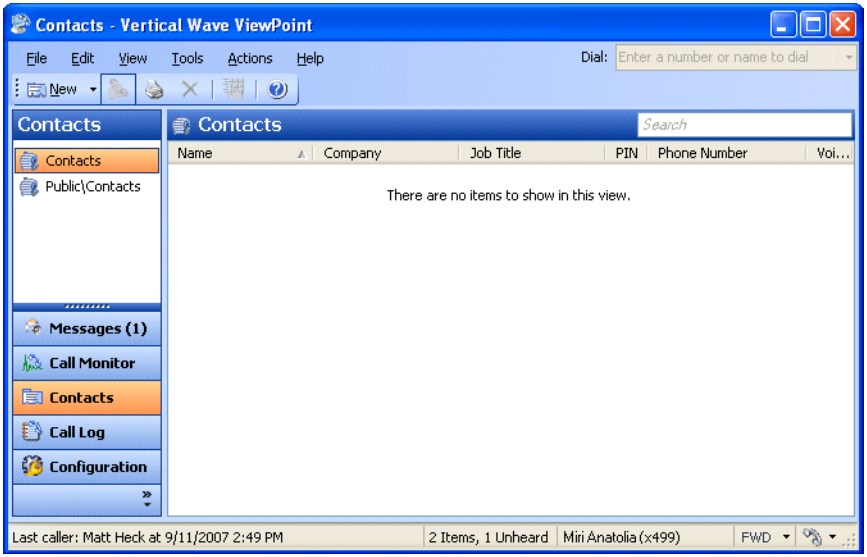
ViewPoint's Contacts folder provides you with an online phone book of your phone contacts in which you can enter the names, phone numbers, and other information about people you talk with frequently on the phone. After you enter contacts, you can place calls to them with a few clicks of the mouse.

This chapter describes the Contacts folder and then explains the following aspects of working with contacts:

- Managing contacts
- Teaching Wave to recognize your contacts
- Using ViewPoint Groups

The Contacts folder

To open the Contacts folder, click its icon in the navigation bar.



Searching the Contacts folder

To find someone quickly, you can type their first or last name (fully or partially) in the Search field. The Contacts folder displays all items whose first or last name begins with the entered text.

Private and public contacts

In Wave, contacts can be private or public:

- **Private contacts** are your own personal contacts. These contacts appear only in the Contacts folder of your ViewPoint on your computer. Other users cannot see your contacts unless you explicitly share your Contacts folder with them.
- **Public contacts** are available to all users in your office. When public contacts call your office, Wave identifies them no matter which extension or user they are calling.

Public contacts contained in the Public\Contacts folder and can also be accessed via the Phonebook pane's Contacts tab, and by choosing **Actions > Place Call**. To enter or edit a public contact, you must have public contact editing permissions. If you do not have those permissions, you can view and place a call to public contacts, but you cannot edit them.

Viewing shared contacts

To view other users' contacts that have been shared with you, click that user's name under **Public Folders** in the Folder List and click the Contacts folder. To set up or change folder sharing, talk to your system administrator. For more about folder sharing, see "Sharing folders" on page 2-35.

Contacts folder tabs

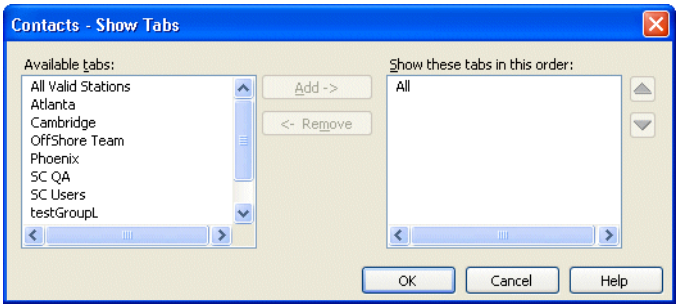
The Contacts folder can optionally contain tabs that display related groups of extensions. Tabs are located at the bottom of the Contacts folder. Click each tab to view its contents.

- **All tab.**
  - In the Contacts folder, the All tab displays all of your personal contacts.
  - In the Public\Contacts folder, the All tab displays all public contacts.
- **Group tabs.** The Contacts folder can optionally display a tab for each public ViewPoint Group of which you are a member, and a tab for any personal ViewPoint Groups that you created. Click a Group tab to see the extensions within that Group. See "Using ViewPoint Groups" on page 10-17.

Showing, hiding, and reordering Contacts folder tabs

To show or hide individual tabs, as well as choose their order

1. In the Contacts folder, choose **View > Show Tabs**. (You can also right-click anywhere in the the Contacts pane and then choose **Show Tabs**.)



2. Select a tab name and click **Add** or **Remove** to set up the **Show these tabs in this order** list. Use the up and down arrow buttons to arrange the order of tabs in the list.
3. Click **OK**. The specified tabs are displayed at the bottom of the Contacts folder.

Changing double-click behavior

You can choose whether double-clicking a contact opens the contact for editing or places a call to the contact. See “Defining double-click behavior in the Contacts folder” on page 12-19 for more information.

Managing contacts

You can manage your contacts using Wave ViewPoint, or you can use another contact manager application or customer relationship management program with Wave if you prefer. You can also import contacts from other contact managers into Wave. See “Importing contacts from other contact managers into Wave” on page 10-16.

Entering a new contact

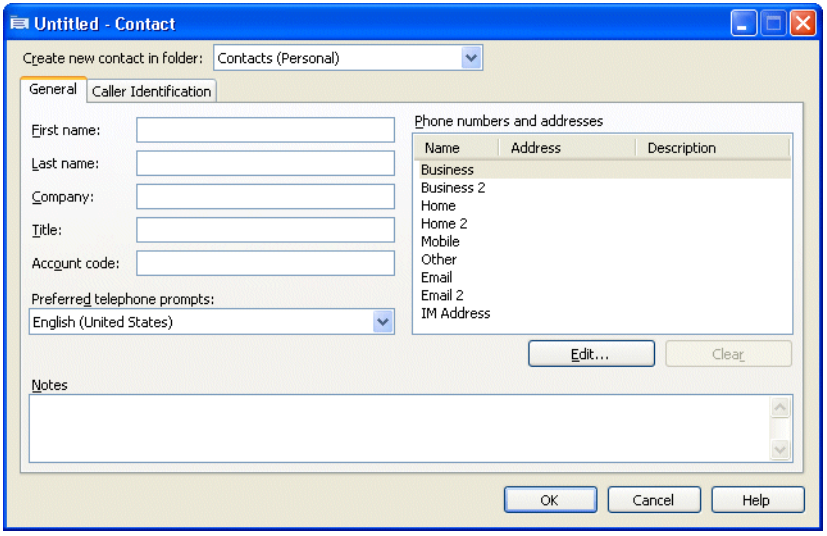
Entering a new contact involves the following tasks, which are explained in detail in the three procedures that follow:

- **Entering a contact's name and basic information**. Other basic information includes the contact’s company, any account code, and the language used for prompts for this contact. You can also enter up to 5,000 characters in the Notes Pane of the Contact dialog. See page 10-6.
- **Entering a contact's phone numbers and addresses**. When you enter a contact’s phone numbers, you can specify the number used for Caller ID and the number that is the default number to dial when you call the contact. You can also specify a contact's e-mail and instant messaging addresses for reference. See page 10-7.
- **Recording a voice title for a contact**. Like your own voice title, a contact’s voice title is a short recording that you create of the contact's name. See page 10-8.

Note: You have a limited amount of space for all voice files, including voice titles. Therefore, if you have many contacts, you can save space by recording voice titles for the most important ones only. Ask your Wave system administrator how much space you have been allocated and how much you have used.

Entering a contact's name and basic information

1. Choose **File > New > Contact**. The Contact dialog opens to the General tab.



2. If you have permission to create public contacts, select which folder to create the contact in, using the **Create new contact in folder** drop-down list.

   If you have permission to create public contacts, you can make this contact a public contact by choosing **Contacts (Public)**. Public contacts can be seen and used by all Wave users. All other selections create a private contact, which only you can see and use.

3. Enter the appropriate information about the contact in the **First Name**, **Last Name**, **Company**, and **Title** fields. The first and last names are displayed in the Call Monitor folder when this contact calls you.

4. If your office uses account codes, you can enter an **Account code** for the contact. Wave automatically uses the account code for the call when it identifies the contact on an incoming call or when you dial one of the contact's numbers on an outgoing call.

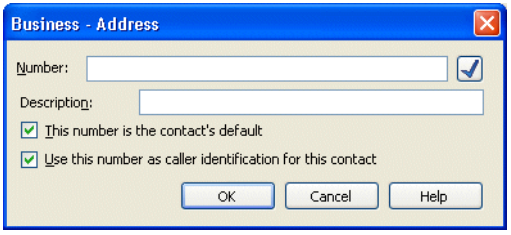
   If you are prompted to enter account codes when you place calls, you will hear a double beep instead of a single beep to indicate you are dialing a contact who has an account code already entered. When you hear the double beep, you can press # on your phone to accept the contact's existing account code, or you can enter another account code.

   For more information, see "Entering an account code for a Call Log entry" on page 8-8.

5. In the **Preferred telephone prompts** drop-down list, select the language that you want Wave to use when it plays voicemail and other prompts to this contact. The available languages are the languages that were installed on your system.

Entering a contact's phone numbers and addresses

1. On the General tab in the Contact dialog, double-click the appropriate line in the **Phone Numbers and addresses** list. The related Address dialog opens.



   - For **Business, Home, Mobile, or Other.**, enter the following information:
     - **Number:** Enter the phone number to dial for the contact.
     - **This number is the contact's default:** Select this checkbox if this is the phone number you dial most frequently to reach the contact. The number you choose as the default is slightly faster to select when you place calls.
     - **Use this number as caller identification for this contact:** Select this checkbox if you want Wave to identify calls from this number as calls from the contact. Checking this box adds the phone number to the contact's Incoming Caller ID list (see "Teaching Wave to recognize your contacts" on page 10-8). If this option is unchecked, calls from this number appear in the Call Monitor and Call Log folders as being from "Unknown."
   - **For Email or IMaddress.** Enter the e-mail or instant message address for the contact. You can enter notes about the address in the **Description** field.

2. Enter notes about the phone number or address in the **Description** field. For example, for a business number, this is a good place to enter the contact's extension.
3. Click **OK** to close the Phone Number dialog.
4. To enter more phone numbers or addresses for this contact, repeat steps 1-3 for the other categories in the **Phone numbers and addresses** list.
5. Click **OK** to close the Contact dialog. The new contact now appears in the Contacts folder.

Recording a voice title for a contact

1. In the Contacts folder, select the contact for whom you want to record a voice title and choose **File > Open**.
2. In the Contact dialog, click the Caller Identification tab.
3. Record the **Voice Title** by using the audio controls. See “Using the audio controls” on page 2-36 for instructions.
4. Click **OK**.

Note: Wave can play the voice titles of contacts over your computer speakers automatically when those contacts call. See “Customizing incoming call behavior” on page 12-13 for more information.

Placing calls to your contacts

You can place a call to a contact with a phone number using ViewPoint. See “Placing a call” on page 6-1 for instructions.

Teaching Wave to recognize your contacts

Wave’s more advanced features depend on Wave recognizing your contacts. You can teach Wave to recognize your contacts in the following ways:

- By recognizing the Caller ID number or name of the contact’s phone.
- By recognizing a special number you give to the contact to dial after your extension, called a Contact PIN. By using Contact PINs, Wave can recognize contacts regardless of the phone they use to call.

Note: Wave automatically identifies other Wave users when they call from their stations or their public numbers.

The benefits of having Wave recognize contacts include:

- Their names appear in the Call Monitor while the phone is ringing to let you know who is calling.
- Their names are displayed on your Caller ID phone, if you have one.

- Their names appear in the Call Log and Messages folders, so that you can easily see contacts in your phone record and quickly call them back.
- You can hear your contact's name announced over your phone or PC speakers—without forcing your callers to say their name every time they call—by saving a recorded voice title with the contact.
- You can use call rules to set up individualized call handling for them, such as playing a unique voicemail greeting or routing their calls according to a specific routing list (see Chapter 11).

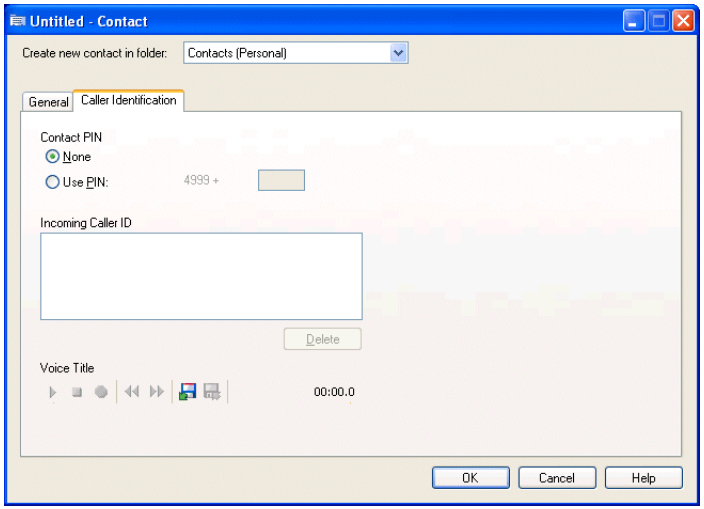
One form of identification, Caller ID from the phone company, is available automatically for every call. The phone number and Caller ID name of the caller appear in the Number column of the Call Monitor, the Call Log, and the Messages folders.

Identifying contacts by name

Each contact has a list of associated phone numbers called the Incoming Caller ID list. When a call arrives from one of those phone numbers, Wave identifies that contact.

The Incoming Caller ID list can include Caller ID names as well as phone numbers. See “Understanding name and number on Caller ID” on page 10-14 for pointers on which item is more useful for identifying a given contact.

To view a contact's Incoming Caller ID list, select the contact in the Contact's folder, choose **File > Open**, and then click the Caller Identification tab.



To guarantee that Wave recognizes contacts, regardless of the phone number from which they are calling, use a contact PIN. See "Using contact PINs for guaranteed recognition" on page 10-14 for more information.

Adding phone numbers for contact recognition

You can add a phone number to a contact's Incoming Caller ID list by doing one of the following:

- Add a new phone number for the contact in the General tab and check **Use phone number as caller identification for this contact**. See "Entering a new contact" on page 10-5 for more information.
- Associate the phone number from a call or voice message with the contact. See "Associating a call or Caller ID number with a contact" on page 10-11 for more information.

Deleting a number from the Incoming Caller ID list

If Wave wrongly identifies a contact as the caller, it is likely that the Incoming Caller ID list for that contact includes an incorrect phone number. You can prevent further misidentification by deleting the phone number from the list.

To delete a number from the Incoming Caller ID list

1. Double-click the contact from whom you want to delete a phone number. The Contact dialog opens.
2. Click the Caller Identification tab.
3. In the **Incoming Caller ID** list, select the incorrect phone number.
4. Click **Delete** and then click **OK**.

Associating a call or Caller ID number with a contact

If Wave shows a caller's name as "Unknown," but you know who the caller is, you can associate the call with one of your contacts. Doing this replaces "Unknown" with the contact's name.

You can also associate the Caller ID number or the name from the call with a contact. Doing this adds the number to the contact's Incoming Caller ID list. Future calls from that phone show that contact as the caller. In this way you can "teach" Wave to recognize the people who call you.

For example, the following illustration shows a voice message before association, showing "Unknown" as the caller.

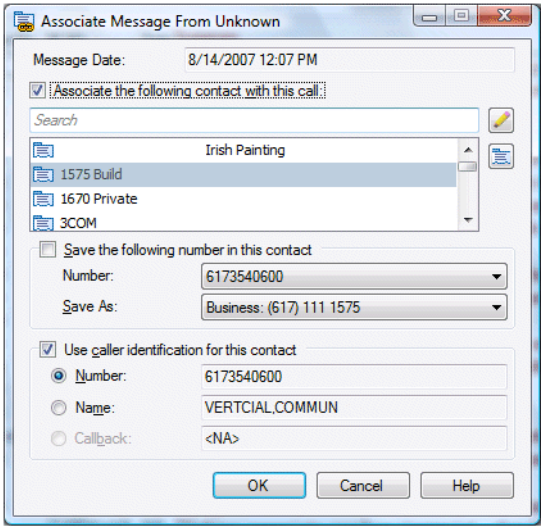
The next illustration shows the same message after you associate it with your contact Nathaniel Chestnut.

You can teach Wave to recognize a caller by Caller ID name instead of the phone number. This can be useful, for example, if the contact calls from a company with a PBX that randomly assigns phone numbers to trunks but uses a Caller ID name that remains the same.

Note: You cannot associate a phone number or Caller ID text with a public contact unless you have permissions to edit public contacts. You can, however, label an individual call as being from a public contact.

To associate a call with a contact

1. Click one of the following:
   - An active call in the Call Monitor folder
   - An entry for a call in the Call Log folder
   - A voice message in any Messages folder
2. Click on the toolbar. The Associate dialog opens.



3. To associate this call with a contact, select the **Associate the following contact with this call** checkbox. Then, identify the contact to associate with the call in any of the following ways:
   - Type all or part of the contact's first, last or company name in the **Search** field and then click .
   - Scroll to the contact in the list, and then select it.
   - Create a new contact directly from this dialog. To do so, click . (See "Entering a new contact" on page 10-5 for instructions.) When you finish creating the contact and return to this dialog, the new contact is displayed in the list.
4. To cancel an association and revert the call to its original identification, uncheck **Associate the following contact with this call**.
5. If the call came from a phone number that is new for this contact, you can add the new number to the contact's phone number list now. To do so, check **Save the following number in this contact**, and then select the phone number category to save it as via the **Save As** drop-down list.
6. If you want only to label the individual call or voice message with the contact's name, deselect the **Use caller identification for this contact** checkbox.

   If you want Wave to associate all subsequent calls from that phone with the contact, check **Use caller identification for this contact** and select one of the following:
   - **Number.** Wave uses the phone number to recognize subsequent calls.
   - **Name.** Wave uses the Caller ID text to recognize subsequent calls.
   - **Callback.** Wave uses the callback number entered by the caller. (This option is only available if the caller entered a callback number.)

   See the next section for more information.
7. Click **OK**.

Understanding name and number on Caller ID

When you receive a call, Wave receives two pieces of information about where the call originated: the phone number and the Caller ID name. You can associate either of these items with a contact.

Depending on where the call originated, one item may work better than the other, as the following examples illustrate:

- **If the call is from a home phone** (for example, ANTANDER,LOU - 6178380405). In this case, where both the number and name are unique, either could be used for association.
- **If the call is from a company with many phone lines** (for example, Vertical Comm - 6175641121). In this case the phone number may change with every call, because the office's PBX system uses a random trunk for all outgoing calls. The Caller ID name, however, remains constant, so you should use that for association.
- **If the call is from a standardized Caller ID name** (for example, california - 7605550807). In cases where the Caller ID name is standardized for many different phones, you should use the phone number for association.

Using contact PINs for guaranteed recognition

Contact PINs provide a guaranteed way for callers to be recognized by Wave whenever they call. A contact with a PIN can call from any phone number and be identified by Wave.

Contact PINs are unique numbers that you give out to contacts. Contacts add their PINs to your extension when they call you.

Note: You cannot enter a contact PIN for a public contact.

Example: Your extension is 177, and you give Mr. Jones a contact PIN of 55. Mr. Jones calls your office, and when prompted to enter your extension, he types in 17755. Wave is thus assured of identifying this call as coming from Mr. Jones.

Example: You have a car for sale, so you could advertise it in the paper with your extension plus a contact PIN (for example, "Call me at ext. 17756"). Set up the contact as "Car buyer" with a PIN of 56. Now when anyone calls about the ad, it appears as from "Car buyer" in your Call Monitor.

To enter a contact PIN

1. In the Contacts folder, double-click the contact for whom you want to create a contact PIN. The Contact dialog opens.
2. Click the Caller Identification tab.
3. Under **Contact PIN**, enter the number that you intend to give to this contact. If the contact PIN you entered conflicts with one already created, Wave prompts you to enter a different number.
4. Click **OK**.

Opening contacts from within other folders

After an incoming call has been identified as coming from a contact, you can easily open the contact record from a Messages folder (if the contact left a voice message) or the Call Log folder. Select the call or voice message, and then choose **Actions > Open Contact**.

Synchronizing your Wave contacts with your e-mail program

You can use Wave Mail to synchronize your contacts between Wave and your e-mail program. For details, see “Synchronizing Wave voice messages and contacts with your e-mail program” on page 7-27.

Using contacts maintained in another contact manager

If you make extensive use of another TAPI-compatible contact manager or customer relationship management application such as Microsoft Outlook, GoldMine or FrontOffice 2000, or Interact Commerce Corporation’s Act!, you can place Wave calls to your contacts from those applications by using the Wave TAPI Service Provider. See your Wave system administrator about installing the TAPI Service Provider, and then follow your contact manager’s instructions for placing calls. Calls placed by other applications still appear in your Wave Call Log and Call Monitor folders.

You can also install the Wave Contact Manager Assistant (CMA) and receive screen-pops showing the name, the Caller ID, and the time of day of the call. Act! users can receive screen-pops without installing the CMA.

You do not need to have the Wave ViewPoint installed to use the TAPI Service Provider or the CMA.

Using the Wave Contact Manager Assistant

The Contact Manager Assistant enables Outlook, GoldMine, or FrontOffice 2000 contact managers to pop up contact information automatically when contacts in one of your contact managers call. Wave recognizes the incoming Caller ID number, Caller ID, or name.

To run the Contact Manager Assistant

1. Choose **Start > Programs >** Vertical Wave > C**ontact Manager Assistant.** The program starts and runs in the background.
2. Right-click in the system tray for a shortcut menu of commands that you can use to configure and personalize the program. For further instructions, see the CMA's online Help.

Importing contacts from other contact managers into Wave

You can export contacts from other contact managers and import them into Wave.

Exporting contacts from Microsoft Outlook

The following instructions show how to export contacts from Microsoft Outlook:

1. In Outlook, Select **File > Import and Export**.
2. Select **Export to a file** from the list and click **Next**.
3. Select **Comma Separated Values (Windows)** and click **Next**.
4. Select a folder in which to store the contacts file and click **Next**.
5. Enter a filename and click **Next**.
6. Click **Finish**.

Importing contacts into Wave

You can import contacts into Wave:

- From a CSV file generated via Wave
- From a CSV file generated from another contact manager such as Microsoft Outlook

For details, see “Importing and exporting Wave items” on page 2-37.

Using ViewPoint Groups

A ViewPoint Group is a group of related extensions or contacts. (Extensions in Wave include users, Contact Center queues, and auto attendants.)

With a Group you can:

- Send, reply, or forward a voice message to the Group. All users with voice mailboxes in the Group receive the message at once. See “Sending a message directly to a user’s voicemail” on page 7-12.
- Create a call rule for the Group. Incoming calls from any user or contact in the Group are handled according to the call rule. For example, you can have a custom voicemail greeting that plays for all the members in your “VIP group.” See Chapter 11 for more information.
- View any extension in your Group when transferring calls, which makes it easier to pick the right recipient. You can set any Group to appear as a tab in the Extensions section of the Transfer To dialog. For example, you can define the members of your Sales department as a Group, including a Station Hunt Group or a special Sales auto attendant. When you have a call for the Sales department, you can click the Sales tab and see all the department members at a glance, along with their current personal statuses. See “Transferring a call” on page 5-11, and “Extensions list tabs” on page 4-3.
- Create a routing list that distributes calls to the users and contacts in a Group according to the distribution algorithm you choose. See “Routing calls to groups” on page 9-18.

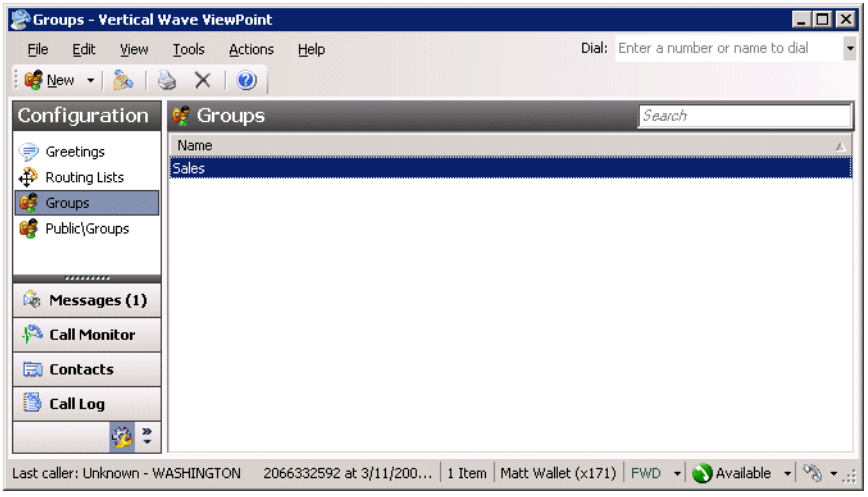
Personal and public Groups

Generally, the Groups you will create in Wave are *personal* Groups. Only you can see the personal Groups that you create—they do not appear in other users' ViewPoints.

Public Groups, which are accessible to all Wave users who have permission to see them, can only be created by your Wave system administrator or a ViewPoint user with permission to do so.

The Groups folder

The Groups folder lets you view and manage your Groups.

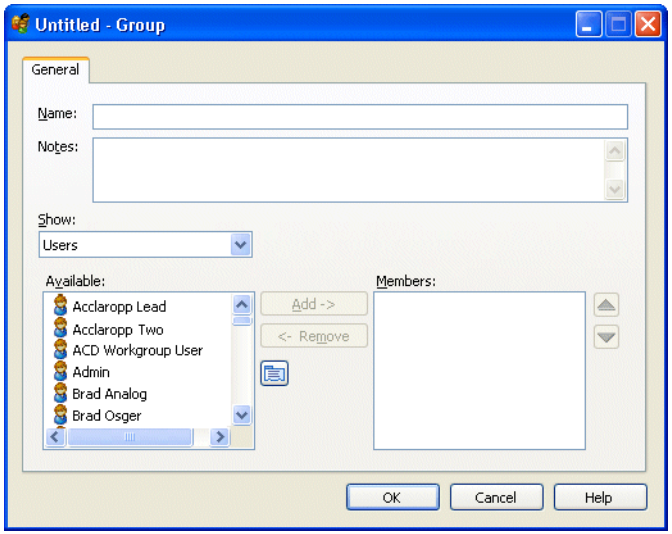


To open the Groups folder, click the Configuration icon in the navigation bar. The Favorite Folders list offers access to your office's Public Groups folder.

Creating a Group

To create a new Group

1. Choose **File > New > Group**. The Group dialog opens.



2. Enter a **Name** for the Group and any **Notes** to describe the Group.
3. Add one or more members to the Group. To do so, select the category in the **Show** drop-down list, select the item from the **Available** list (or Ctrl+click to select multiple items), and then click **Add**. You can also drag and drop an item from one list to the other.

   The members you selected appear in the **Members** list. Use the arrows next to the list to rearrange the order of the members. Click **Remove** to delete the selected member from the Group.

   Note: The order of the Group is important only if you have set up a routing list that calls the Group using the method **Sequentially from the top down** or **Individually in a round robin**. The order is not important if the routing list uses the **Simultaneously** method. See “Routing calls to groups” on page 9-18.

Note: Contact Center queue and auto attendant extensions in a Group are not processed by a routing list the same way that user extensions and contacts are processed. If a routing list step calls a Group and the next member in the Group is a queue or auto attendant, processing stops and the call is sent to the voice mailbox of the current step. For this reason, you may want to reorder the members of a Group in order to maximize the chances for a call to be answered. For example, if your routing list processes calls using the Sequentially from the top down method, consider moving non-user extensions to the bottom of the list.

4. Click **OK**.

Each ViewPoint Group can appear as a tab in your Extensions list. For more information, see “Extensions list tabs” on page 4-3.

Using Call Rules

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About call rules

Wave call rules enable you to handle specific incoming calls differently from other calls. For example, you can create a call rule for your friend Jim so that he is routed to your cell phone and hears a special voicemail greeting whenever he calls. A call rule can trigger on calls from specific people and/or the dates and times that the call is received.

Call rules overview

To create a call rule, you determine two things:

- Which incoming calls activate the call rule
- How the call rule handles those calls differently than calls that do not match a call rule

Distinguishing which incoming calls activate the call rule

You can distinguish which incoming calls are handled by a call rule by using one or both of the following conditions:

- **People or Group condition.** The rule activates depending on who is calling. In addition to having call rules for individual callers, you can have call rules that apply to all internal callers, all external callers, unidentified callers, or any member of a Group.

  Example: You create a call rule for your important client that activates whenever he or she calls.

- **Dates/Times condition.** The rule activates depending on when the call arrives. You can handle calls differently during business hours, after business hours, and at specific dates or times.

  Example: You create a call rule that handles all incoming calls after business hours.

When you combine caller and schedule conditions, the call rule handles calls only when both conditions are met. For example, a call rule for your client Jim after business hours handles only calls from Jim that occur after business hours. If Jim calls during business hours, the call rule does not activate. Likewise, if anyone other than Jim calls after business hours, the call rule does not activate.

Determining how the call rule handles calls

A matching call rule can handle incoming calls differently than other calls in the following ways:

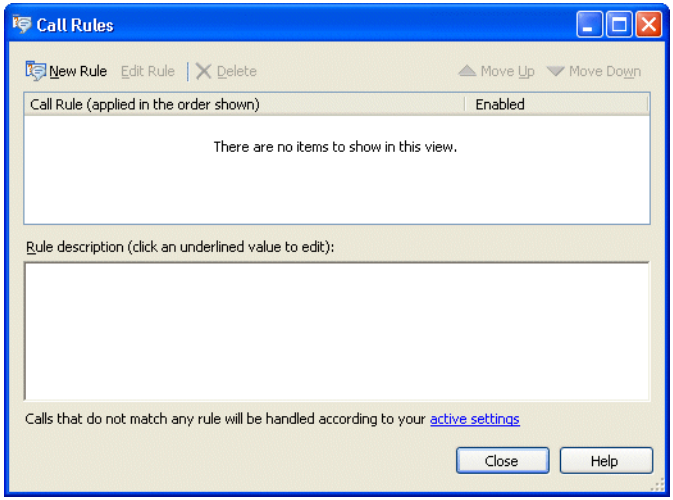
- **Greeting.** You can choose which greeting plays if the caller reaches your voicemail.
- **Routing List.** You can choose which routing list the call follows.
- **Send to voicemail.** You can send the call straight to voicemail without ringing your phone, as if you were in Do Not Disturb status.
- **Always ring.** You can override Do Not Disturb so that the call always rings your phone.

Examples of how you can use call rules

- Calls from your “Prospects” Group can follow a routing list that tries you at several locations in the office during business hours.
- During your lunch hour, you can have a special “At lunch” greeting that plays to callers before sending them to voicemail.
- You can have the privacy of Do Not Disturb activate automatically every day at 6:00 pm, but only for internal callers.
- You can create a contact called “Nuisance Callers” and associate the phone numbers of salespeople with that contact. Those callers can follow a routing list that plays a greeting and then hangs up without ringing your phone. The greeting can say, “I’m sorry. I don’t accept calls from salespeople during business hours.”

The Call Rules dialog

The Call Rules dialog lets you view and manage your call rules. To open the Call Rules dialog, choose **Tools > Call Rules**.



The top pane of the Call Rules dialog displays the call rules you have created. Call rules that are active display with a check mark in the Enabled column. Click a call rule to see its description in the bottom pane. You can click the links in the bottom pane description to edit elements of the selected call rule.

Enabling and disabling a call rule

To disable a call rule, select it in the top pane and click **Disable**. Disabled call rules are not used. To enable it again, click **Enable**.

Organizing the priority of call rules

Call rules are listed in the top pane in order of priority, with the highest-priority call rule on top. To change a call rule's priority, select it and move it in the list by clicking **Move Up** or **Move Down**.

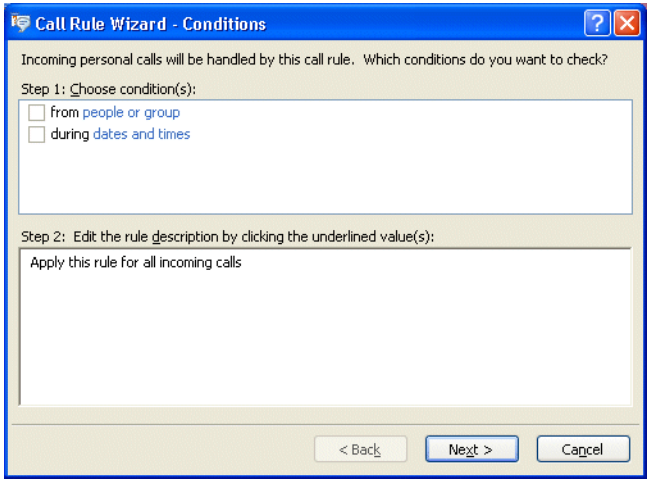
See "Call rule priority" on page 11-10 for more information.

Creating a new call rule

The following procedure explains how to create a call rule.

To create a new call rule

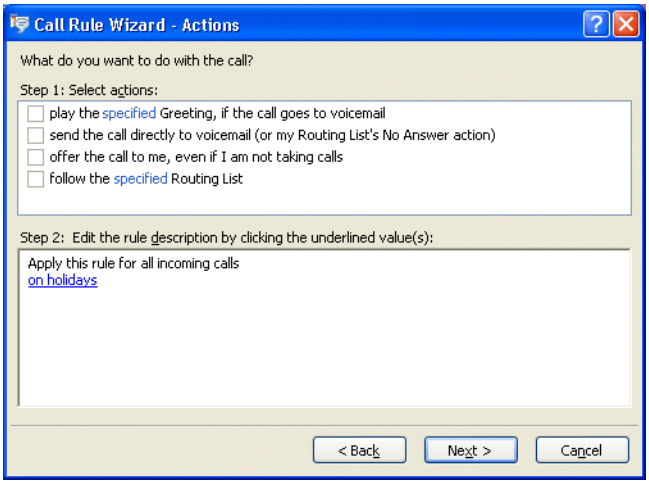
1. From the Call Rules window, click **New Rule**. To edit an existing call rule, select it in the top pane and click **Edit Rule**. The Conditions page of the Call Rule Wizard opens, where you can choose which incoming calls are trigger the rule.



2. Check either or both of the following options:

   - **From people or Group.** Check to have the call rule trigger on calls from certain individuals, groups, or categories of calls. Click **people or Group** in the bottom pane to select which people trigger the rule. See “Specifying people that trigger a call rule” on page 11-6 for instructions.
   - **During dates and times.** Check to have the call rule trigger on calls that arrive during certain dates and times. Click **dates and times** in the bottom pane to specify when the rule triggers. See “Specifying dates and times to trigger a call rule” on page 11-7 for instructions.

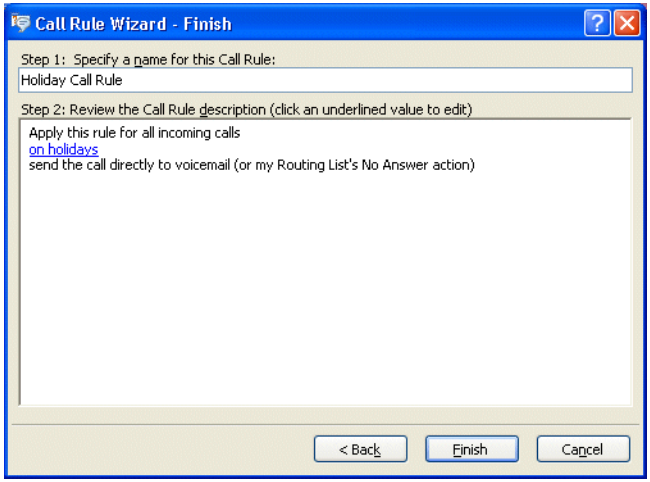
3. Click **Next**. The Actions page of the Call Rule Wizard opens, where you can specify what actions the call rule performs on calls that trigger it.



4. Check the following options singly or in combination:

   - **Play the specified greeting, if the call goes to voicemail.** Check, then click the greeting link in the bottom pane, to specify a greeting that the caller hears if the call goes to your voicemail.
   - **Send the call directly to voicemail.** Check to have the call rule send incoming calls to your voicemail without ringing your phone.
   - **Offer the call to me, even if I am not taking calls.** If checked, calls that trigger the rule will always ring your phone, overriding your Do Not Disturb.
   - **Follow the specified routing list.** Check, then click the routing list link in the bottom pane, to specify a routing list that the call rule uses to route the call.

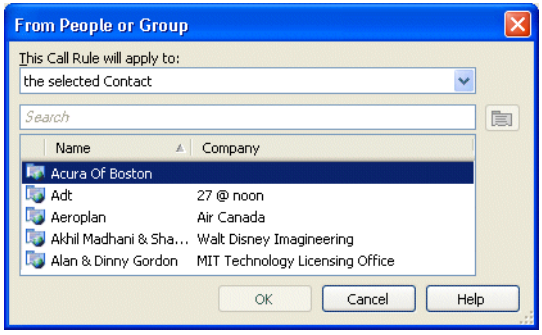
5. Click **Next**. The Finish page of the Call Rule Wizard opens.
6. Enter a name for the call rule. Use the bottom pane to edit elements of to the call rule if needed.



7. When the call rule is complete, click **Finish**.

Specifying people that trigger a call rule

If you select the **From people or Group** checkbox on the Condition page of the Call Rule Wizard, click **people or Group** in the bottom pane to specify which callers trigger the call rule. The From People or Group dialog opens.

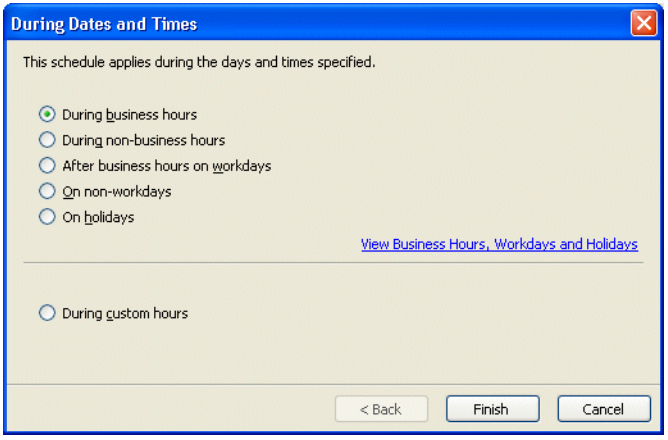


From the **This call rule will apply to** drop-down list, choose one of the following options:

- **The selected contact/user/Group.** Click an item in the list. Type the beginning of the name in the **Search** field to narrow the search. The call rule triggers on all calls from the selected contact, user, or Group member.
- **All internal callers.** The call rule triggers on all calls from within the Wave system.
- **All external callers.** The call rule triggers on all calls from outside the Wave system.
- **All "Unknown" callers.** The call rule triggers on all external calls not associated with a personal or public Wave contact.
- **All "Unknown" callers without Caller ID name and number.** The call rule triggers on external calls that are not associated with a personal or public Wave contact, and also do not have a Caller ID name and number.

Specifying dates and times to trigger a call rule

If you check **During dates and times** on the Conditions page of the Call Rule Wizard, click the dates and times link in the bottom pane to specify when the call rule triggers. The During Dates and Times Wizard opens.

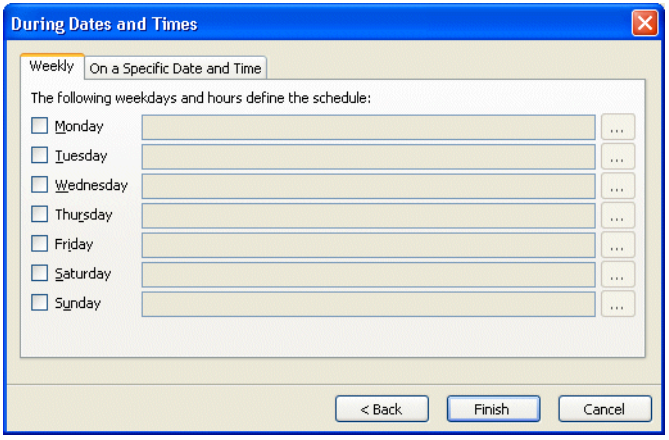


To base the call rule's activation on your system's business hours, click one of the options in the top group. Click the link to view your system's schedule for business hours and holidays. After making your selection, click **Finish**.

To activate the call rule according to another schedule, click **During custom hours**, then click **Next**. See the next section, "Specifying custom hours."

Specifying custom hours

If you selected **During custom hours** as your schedule condition, click **Next** on the During Dates and Times page to open the next Wizard page, where you can specify when the call rule activates.

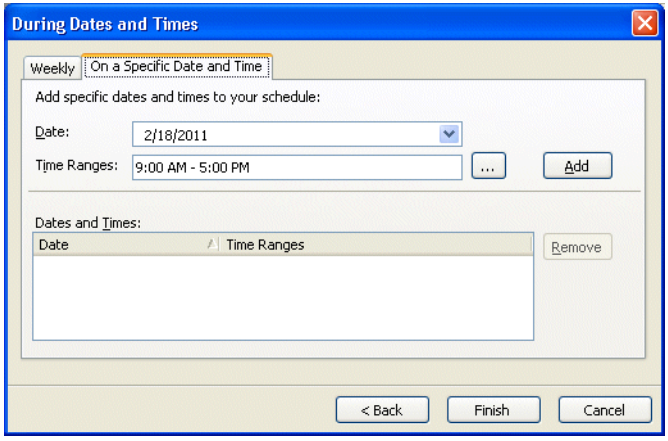


To have the call rule activate on a daily or weekly basis

1. On the Weekly tab, check the days on which you the call rule to activate. The call rule will activate every week on that day during the times specified.
2. To edit the active hours for a day, click the ... button for that day. You can also type in the hours using hyphens for a range and commas to separate multiple ranges. For example: 9:00 AM - 12:00 PM, 1:00 PM - 5:00 PM.
3. Click **Finish**.

To have the call rule activate on one or more individual dates

1. Click the On a Specific Date and Time tab.



2. Enter a **Date** on which the call rule will be active.
3. To edit the active hours for that date, click ... . You can also type in the hours using hyphens for a range and commas to separate multiple ranges. For example: 9:00 AM - 12:00 PM, 1:00 PM - 5:00 PM.
4. Click **Add** to add that date, with its selected hours, to the Dates and Times list.
5. Repeat steps 2 through 4 to add other dates to the Dates and Times list, if needed. The call rule will activate on each date/time specified in the Dates and Times list.
6. To remove a date from the Dates and Times list, click it and click **Remove**.
7. Click **Finish** when done.

Quickly creating call rules for contacts or groups

To quickly create a call rule that triggers on calls from a contact or a member of a Group, do the following:

1. Select the contact or Group in the appropriate ViewPoint folder.
2. Choose **Actions > Create Call Rule**.

The Call Rule Wizard opens with that contact or Group already entered. See “Creating a new call rule” on page 11-4 for further instructions.

Call rule priority

Wave handles incoming calls according to the priority of your call rules. The call rules in the Call Rules window are ordered from the top down. If two call rules apply to the same call, the call rule highest in the list is the one used.

You can create multiple call rules that contain similar caller and schedule conditions, and then prioritize them to ensure that the correct greeting and routing list are used for calls. For example, if you create a call rule for a Group, but want calls from a certain individual within that Group to be handled differently, you can create a call rule for that individual and give it a higher priority than the Group’s call rule.

To set the priority of a call rule

1. Select a call rule in the Call Rules window.
2. Click **Move Up** or **Move Down** to move the call rule to a higher or lower priority position.

How Wave resolves call rule conflicts

When a call is subject to multiple call rules, the actions taken (greeting, routing list, etc.) are determined by the highest call rule in the list for which an action is selected. If the highest rule sets an action, that action is used. But if it has an unselected action, while a lower rule sets that action, the action from the lower rule is used. This can result in actions from different call rules being used on a single call.

Example: A call rule for Paul plays a custom greeting, but leaves the routing list action unselected. Paul is also a member of the Sales Group, for which you have a lower call rule that specifies a routing list to follow. When Paul calls, Wave plays the custom greeting from the higher call rule, and uses the routing list from the lower call rule.

Customizing ViewPoint

CHAPTER CONTENTS

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About customizing ViewPoint

You can customize ViewPoint and your Wave account to suit the way you work.

Most customization options presented in this chapter are set in the Options dialog, accessed by choosing **Tools > Options**. Your Wave system administrator may have made some or all tabs of the Options dialog unavailable to you. See your system administrator if you cannot access a particular option that is described in this chapter.

Guide to the Options dialog

Note: Depending on your system configuration and your specific user permissions, some Options tabs or Wave features described in this chapter may not be visible to you in ViewPoint. See your system administrator for more information.

Use the following table to locate instructions for the fields in the Options dialog.

Tab	Field	See...
All	**Change Password**	"Changing your password" on page 2-17
Personal	**Voice title**	"Recording your voice title" on page 12-4
	Telephone prompts	"Changing the language of phone command prompts" on page 12-5
	Personal operator	"Changing your personal operator" on page 12-7
	List in dial-by-name directory	"Customizing your listing in the dial-by-name directory" on page 12-8
Personal \ My Numbers		"Entering My Numbers" on page 6-5
Personal \ Wave Mail		"Synchronizing Wave voice messages and contacts with your e-mail program" on page 7-27
Phone	**Default ring duration**	"Customizing how long your phone rings" on page 12-9
	Enable call waiting	"Customizing or turning off call waiting" on page 12-6
Phone \ Softphone Devices		"Configuring the ViewPoint Softphone" on page 12-10
Voice Messages	**Maximum message length**	"Setting a maximum length for your voice messages" on page 7-10
	Voice message playback order	"Setting voice messages playback order" on page 12-15
	Play a sound when a new message arrives	"Playing a sound when a new message arrives" on page 12-16
Voice Messages \ Usage	**Mailbox size**	"Managing your voicemail maximums" on page 7-10
	Remove Items From Deleted folder	"Managing the Deleted folder" on page 2-33
Voice Messages \ E-Mail Notification		"Setting up e-mail notification" on page 7-14

Tab	Field	See...
Voice Messages \ Pager Notification		“Setting up pager notification” on page 7-16
Voice Messages \ Call Notification		“Setting up call notifications” on page 7-18
ViewPoint	**Log on automatically**	“Disabling automatic logon” on page 2-9
	Double clicking contacts behavior	“Defining double-click behavior in the Contacts folder” on page 12-19
	Language	“Using ViewPoint in languages other than English” on page 2-15
	New Routing Lists	“Using the Routing List Wizard vs. the Routing List Editor” on page 9-9
	Disable auto-updates	“Performing automatic updates” on page 2-2
ViewPoint \ Call Monitor		“Displaying the Call Monitor folder automatically” on page 5-6
ViewPoint \ Call Alerts		“Customizing incoming call behavior” on page 12-13

Customizing phone behavior

The options described in this section allow you to customize your interaction with Wave on the phone. These options include:

- Recording your voice title. See this page.
- Changing the language of phone command prompts. See page 12-5.
- Customizing or turning off call waiting. See page 12-6.
- Changing your personal operator. See page 12-7
- Customizing your listing in the dial-by-name directory. See page 12-8
- Customizing how long your phone rings. See page 12-9.

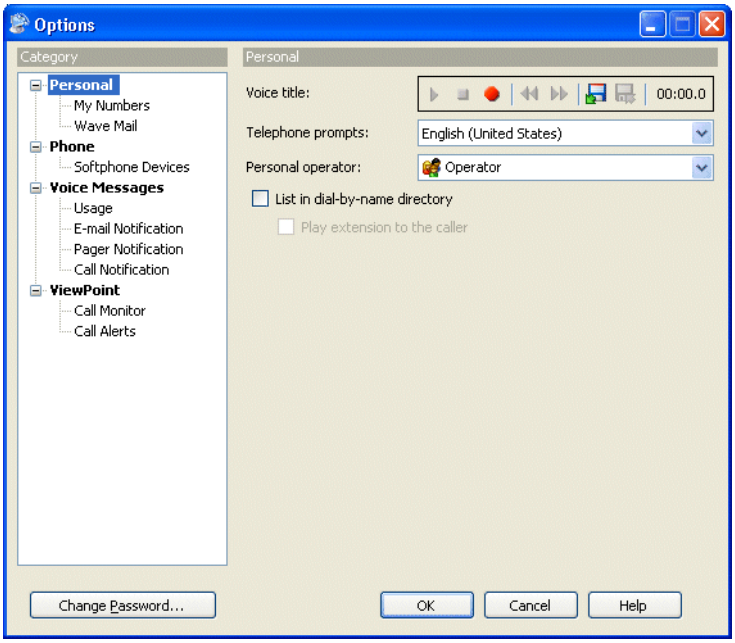
Recording your voice title

A voice title is a short recording of just your name that Wave fits into its own recorded prompts.

Note: You have a limited amount of space for your voice title, your contacts' voice titles, your greetings, and recorded conversations. Your Wave administrator can tell you how much space you have been allocated and how much you have used.

To record a voice title in ViewPoint

1. Choose **Tools > Options**. When the Options dialog opens, click the Personal tab.



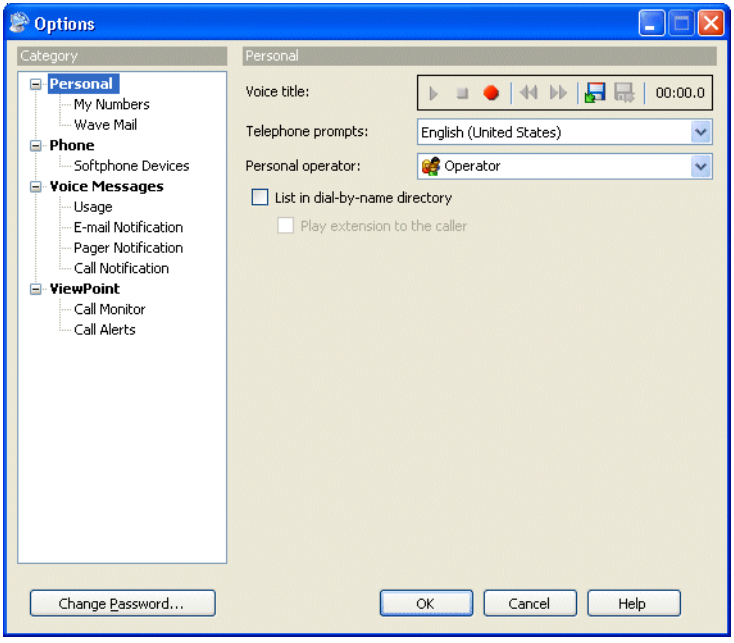
2. Use the audio controls for **Voice title** to record your voice title. See "Using the audio controls" on page 2-36 for more information.
3. Click **OK**.

Changing the language of phone command prompts

Wave can play the phone command prompts in any language that has been installed with Wave. Whenever you log on or press **Flash** (on an analog phone), the prompts are played in the language you choose.

To change the phone commands language

1. Choose **Tools > Options**. When the Options dialog opens, click the Personal tab.



2. On the Personal tab, select the language that you want on the **Telephone prompts** drop-down list. All of the languages currently installed on the Wave Server are listed.
3. Click **OK**. When prompted, restart ViewPoint.

Customizing or turning off call waiting

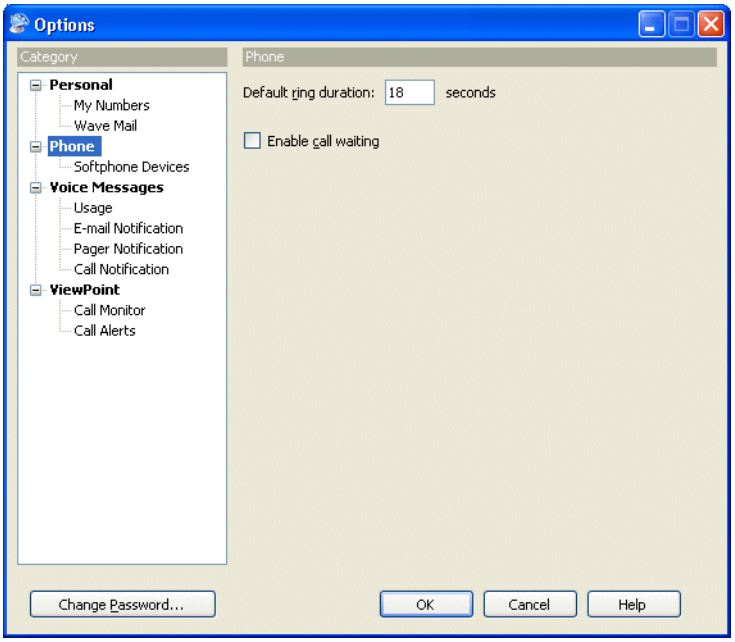
With call waiting turned off, incoming calls that arrive while you are on the phone go directly to your voicemail.

Even if call waiting is turned off, you can still easily intercept an incoming call visually in your Call Monitor folder. See Chapter 5 for more information.

Note: Call Waiting can only be customized if your phone supports it.

To customize call waiting or turn it off

1. Choose **Tools > Options**. When the Options dialog opens, click the Phone tab.



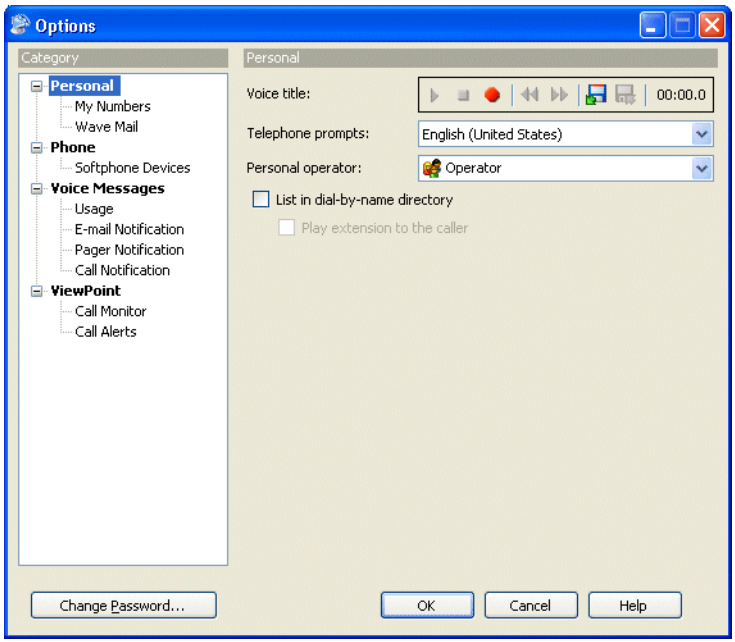
2. Select the **Enable call waiting** checkbox to use call waiting. Deselect this checkbox to turn call waiting off.
3. Click **OK**.

Changing your personal operator

A caller can always press **0** after reaching your voice mail or when listening to your routing list prompts. By default, **0** transfers the caller to your system Operator, but you can transfer them to any other extension, for example, your company's auto attendant.

To change the extension to which callers transfer when they press 0

1. Choose **Tools > Options**. When the Options dialog opens, click the Personal tab.



2. Choose an extension on the **Personal operator** drop-down list.
3. Click **OK**.

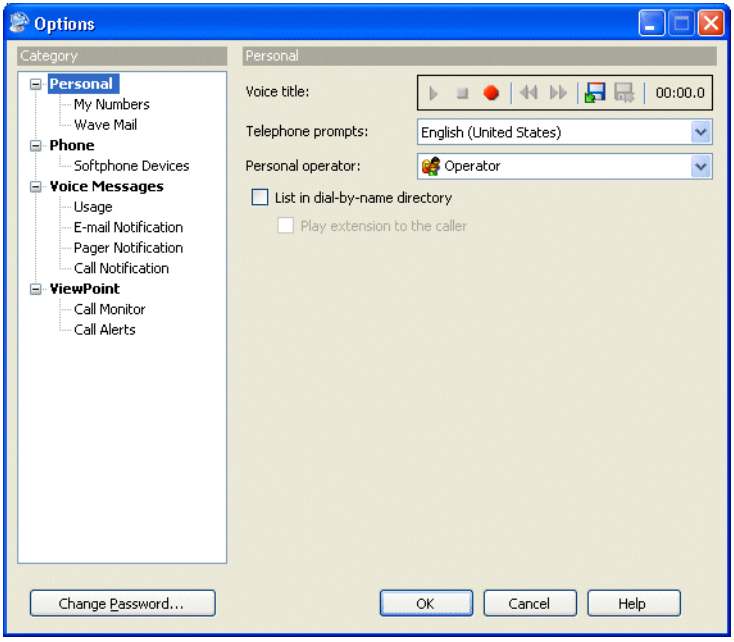
Customizing your listing in the dial-by-name directory

The dial-by-name directory lets callers dial a user by entering the first few letters of the user's name. Callers who know your name but not your extension can find you quickly via the dial-by-name directory.

You can remove your name from the dial-by-name directory if you want only callers who know your extension to call you. You can also specify whether or not the dial-by-name directory reads your extension to callers.

To customize your dial-by-name listing

1. Choose **Tools > Options**. When the Options dialog opens, click the Personal tab.



2. Deselect the **List in dial-by-name directory** checkbox to remove your name from the dial-by-name directory. If checked, callers can dial you by name.

3. If you choose to be listed in the dial-by-name directory, you can select the **Play extension to the caller** checkbox to have Wave read your extension to callers who find you via the dial-by-name directory. Callers hear “Transferring to <your voice title> at extension <your extension>.”

   If not selected, callers who find you by using the dial-by-name directory hear only “Transferring to <your voice title>.”

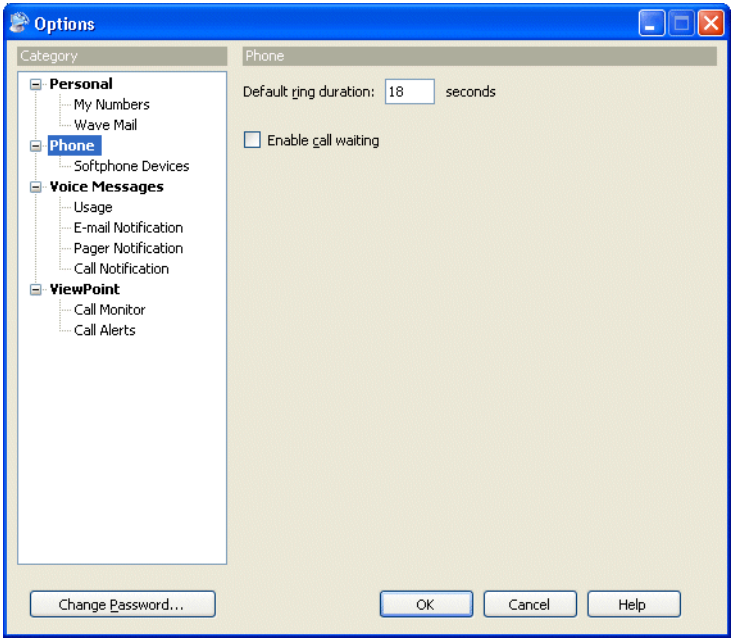
4. Click **OK**.

Customizing how long your phone rings

You can specify how long a call rings your phone before it proceeds to your voice mail. Ring duration for call forwarding is determined elsewhere.

To specify how long your phone rings

1. Choose **Tools > Options**. When the Options dialog opens, click the Phone tab.



2. In **Default ring duration: ___ seconds**, enter the number of seconds your phone will ring before a call proceeds to the next action on your routing list (by default your voice mail). (The ring duration you enter here can be overridden by the ring duration specified in a personal status or routing list.)

   Note: By default the minimum ring duration is 5 seconds and the maximum is 120 seconds. Your system administrator can extend the possible range from 1 to 999 seconds.

3. Click **OK**.

Note: Caller ID is transmitted between the first and second ring. If your phone supports Caller ID, you may want to increase the **Default ring duration: ___ seconds** setting so that there is enough time for Caller ID to be displayed and read before the call is sent to your voice mail.

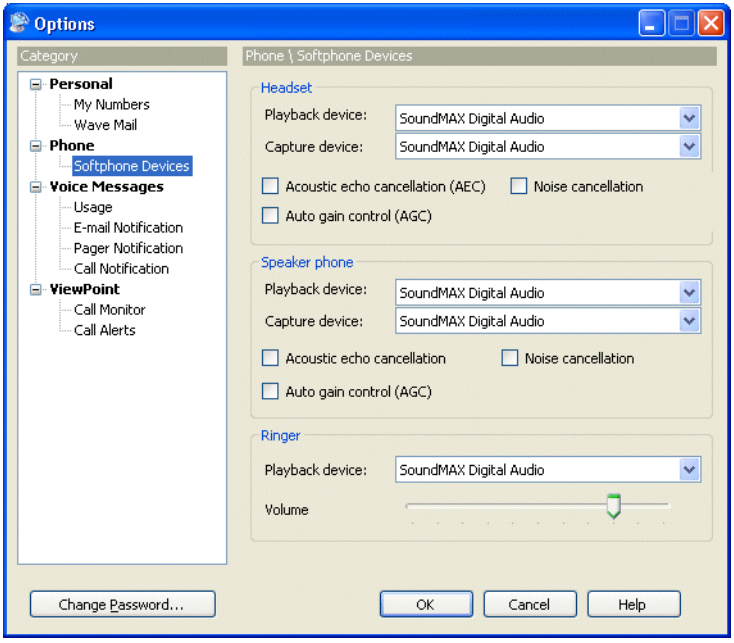
Configuring the ViewPoint Softphone

Important: Before you can use the ViewPoint Softphone as your primary or secondary phone, you must be configured to do so by your Wave system administrator. See "Using the ViewPoint Softphone" on page 2-6 for an overview of the ViewPoint Softphone.

The default device settings for the audio playback and capture devices (microphone and speakers, headset, or other USB audio devices) on your laptop or PC that you use in conjunction with the ViewPoint Softphone will work in most cases. You use this tab to modify the default settings to use a specific device, or if you receive a popup at logon warning you that the default device could not be loaded.

To configure the ViewPoint Softphone

1. Choose **Tools > Options**. When the Options dialog opens, click the Phone \ Softphone tab.



2. In the **Headset settings** section, enter the following information that applies to the headset that you use with the ViewPoint Softphone.
   - **Playback Device**. Select the entry for your playback device from the drop-down list.
   - **Capture Device**. Select the entry for your voice capture device from the drop-down list.
   - **Acoustic echo cancellation**. Select this checkbox to reduce perceived echo on headset calls.
   - **Noise cancellation**. Select this checkbox to reduce background noise on headset calls.
   - **Auto gain control (ACG)**. Select this checkbox to automatically adjust volume level on headset calls.In the

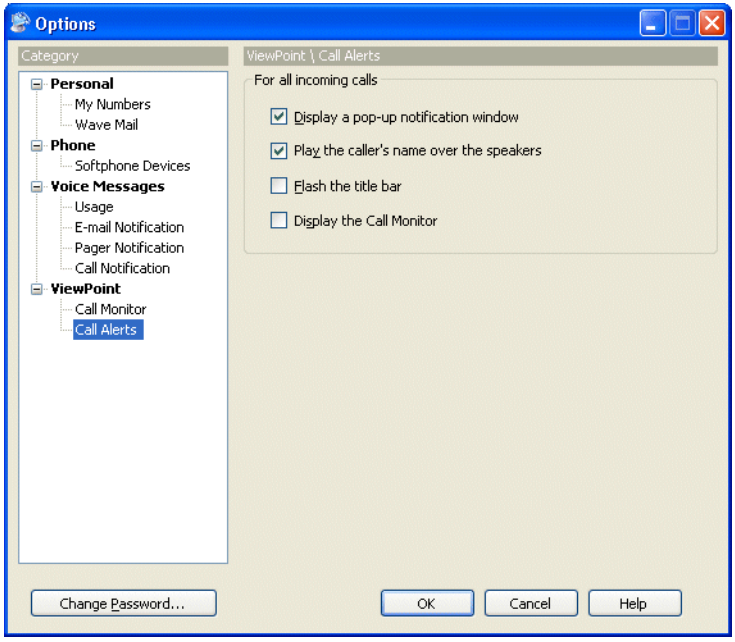
3. In the **Speaker phone settings** section, enter the following information that applies to the computer speakers and microphone that you use with the ViewPoint Softphone.
   - **Playback Device**. Select the entry for your playback device from the drop-down list.
   - **Capture Device**. Select the entry for your voice capture device from the drop-down list.
   - **Acoustic echo cancellation**. Select this checkbox to reduce perceived echo on speaker phone calls.
   - **Noise cancellation**. Select this checkbox to reduce background noise on speaker phone calls.
   - **Auto gain control (ACG)**. Select this checkbox to automatically adjust volume level on speaker phone calls.
4. In the ***Ringer settings** section, enter the following information that applies to how you will be audibly notified that you have a new call.
   - **Playback Device**. Select the entry for your playback device from the drop-down list.
   - **Volume**. Use the slider to set the default volume on Softphone calls.
5. Click **OK**.

Customizing incoming call behavior

You can specify the call alert behavior to occur when you receive an incoming call. If you have Call Monitor tabs other than “My Phone,” you can set call alerts separately for each tab-category of calls (see “Call Monitor folder tabs” on page 5-3). For example, you can have the ViewPoint title bar flash only on calls for your colleague whose Call Monitor you are sharing.

To set call alerts

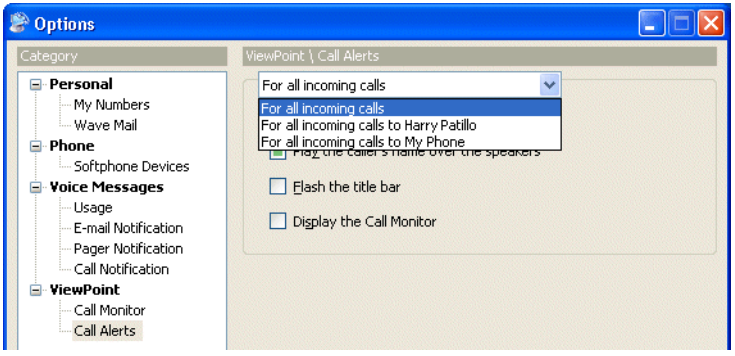
1. Choose **Tools > Options**. When the Options dialog opens, click the ViewPoint \ Call Alerts tab.



2. Select one or more of the following options for all incoming calls:

   - **Display a pop-up notification window.** Opens a pop-up window opens displaying the callers's name.
   - **Play the caller's name over the speakers**. Announces the caller's name over your computer speakers if the recording is available. Wave users and identified contacts are announced if they have voice titles already recorded.
   - **Flash the title bar**. Flashes ViewPoint's title bar.
   - **Display the Call Monitor.** Brings ViewPoint to the front of your desktop with the Call Monitor showing when a call arrives. If you are actively working in another folder, ViewPoint opens the Call Monitor folder.

   Note: If your Wave administrator has shared one or more other users' Call Monitors with you, you can specify different options for incoming calls from each Call Monitor. To do so, select each Call Monitor entry from the drop-down list in turn and select the appropriate options. To set the same options for all Call Monitors to which you have access, select **For all incoming calls** from the drop-down list.



3. Click **OK**.

Customizing voice message behavior

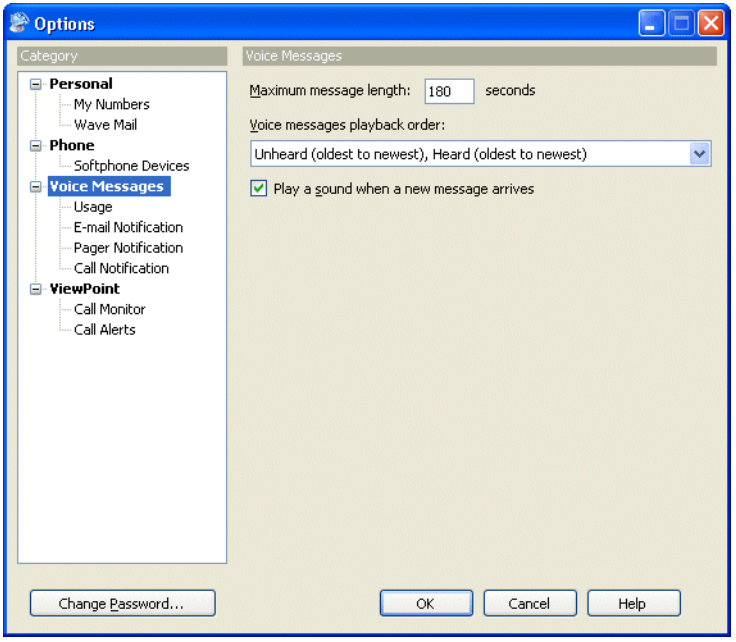
You can customize the following voice message behaviors.

Setting voice messages playback order

This is the order in which Wave plays back voice messages when you are listening to your voice messages using the phone commands, for example “Unheard (oldest to newest), Heard (oldest to newest)”.

To set voice message playback order

1. Choose **Tools > Options**. When the Options dialog opens, click the Voice Messages tab.

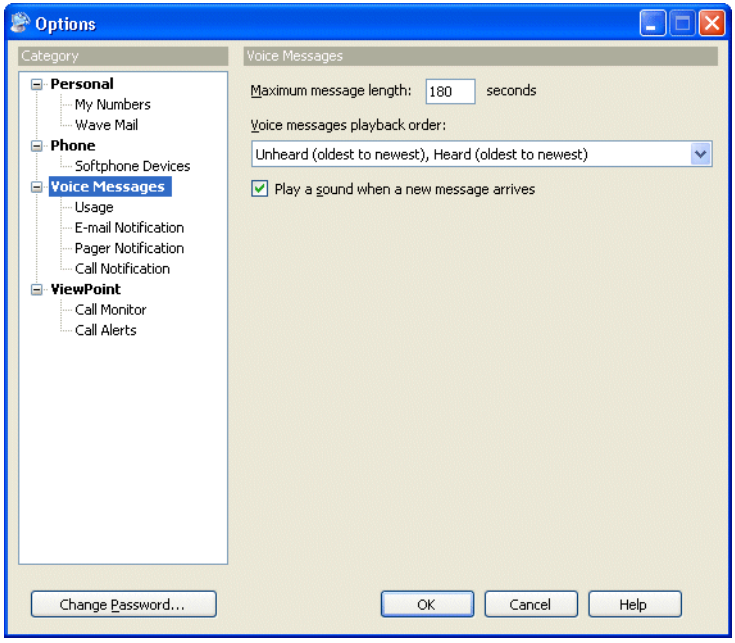


2. Under **Voice messages playback order**, choose the order in which you prefer to listen to your messages, for example **Unheard (newest to oldest), Heard (newest to oldest)**.
3. Click **OK**.

Playing a sound when a new message arrives

You can play a sound over your computer 'speakers whenever a new voice message arrives for you.

1. Choose **Tools > Options**. When the Options dialog opens, click the Voice Messages tab.



2. Check **Play a sound when a new message arrives**.
3. Click **OK**.

Note: The sound file played is Chord.wav, located in the Wave ViewPoint directory (by default C:\Program Files\Wave\Client). To play a custom sound file, name it Chord.wav and place it in that directory.

Customizing ViewPoint for operators

If you are an Operator user, you can use the following options to make your tasks easier and faster:

- **Transfer calls by dragging-and-dropping to the Phonebook pane.** If you display the Phonebook pane in the Call Monitor folder, you can transfer a call by dragging it from the Call Monitor to a contact or an extension. This action performs a blind transfer. See “Adjusting the Phonebook Pane layout in the Call Monitor” on page 2-26 and “Dragging and dropping items” on page 2-28.
- **Resize the Transfer To dialog.** You can make the Transfer To dialog larger so that you can see more users and more columns at a glance. Wave remembers the new size of the Transfer To dialog whenever you open it.
- **View users by Group.** In the Extensions list and Transfer To dialog, each Group can be represented by a tab that lists its members. You can create Groups that represent the departments of your office, so that when transferring calls, you can see at a glance all the users in a given department. For example, if you have to transfer a call to Sales, you can click the Sales tab (for the Sales Group) and see all the members of the Sales department and their current personal statuses. See “Extensions list tabs” on page 4-3.
- **Manage all parked calls together.** Right-click any Call Monitor tab, choose **Show Tabs**, and add the **Parked** tab.

Customizing the ViewPoint display

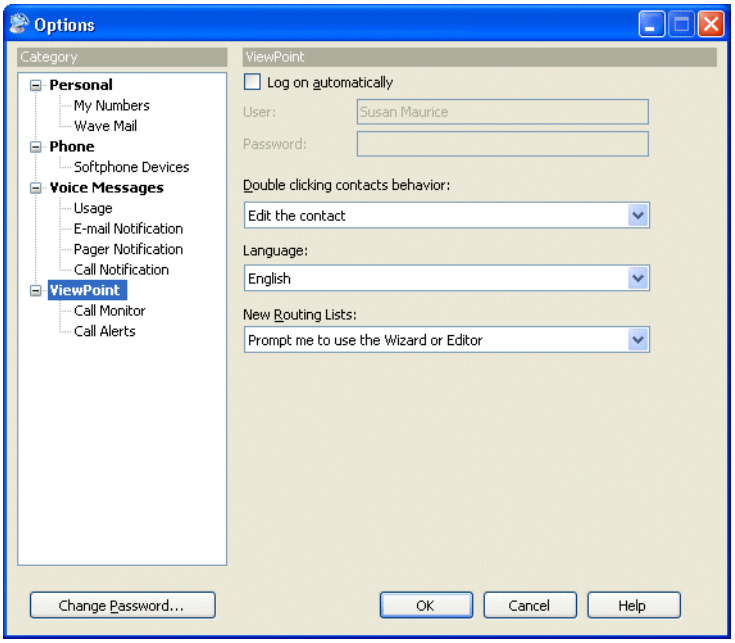
You can customize your ViewPoint display in any of the following ways:

- Change ViewPoint’s language. See page 12-18.
- Define double-click behavior in the Contacts dialog. See page 12-19.
- Customize columns. See page 12-20.

Changing ViewPoint's language

You can change the language of the ViewPoint user interface. To do so:

1. Choose **Tools > Options**. When the Options dialog opens, click the ViewPoint tab.



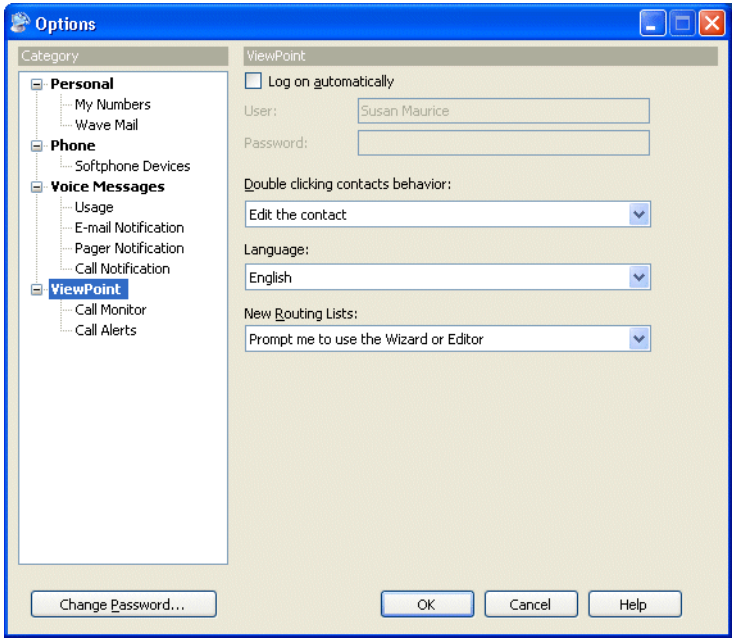
2. Select the desired language from the **Language** drop-down list.
3. Click **OK**. You must restart ViewPoint for the change to take effect.

Defining double-click behavior in the Contacts folder

Double-clicking a contact lets you either edit the information for the contact or place a call to the contact.

To set double-click behavior

1. Choose **Tools > Options**. When the Options dialog opens, click the ViewPoint tab.



2. Under **Double clicking contacts behavior**, select one of the following behaviors:
   - **Edit the contact.** Double-clicking a contact in the Contacts folder opens the Contact dialog for the contact.
   - **Call the contact**. Double-clicking a contact in the Contacts folder places a call to the contact.
3. Click **OK**.

Customizing columns

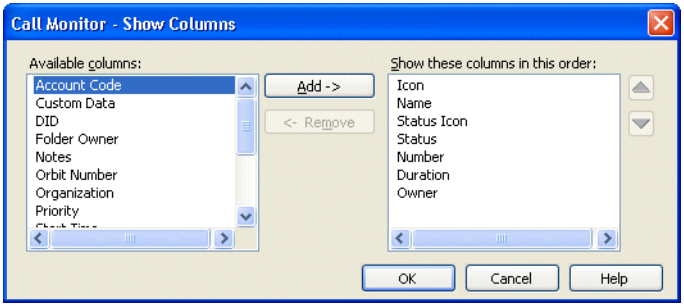
You can choose to show or hide columns in a folder. You can also customize columns in a folder by moving, resizing, and sorting them. The changes you make to columns in a folder are saved when you exit ViewPoint.

Showing and hiding columns

For each folder in ViewPoint, you can choose the columns that you want to see in the folder. Some folders do not show all the available columns by default.

To show or hide columns in a ViewPoint folder

1. Choose **View > Current View > Show Columns**. You can also right-click in the folder and select **Show Columns**. The Show Columns dialog opens. For an explanation of the columns, click **Help**.



2. Do any of the following:
   - In the **Available columns** list, select a column and click **Add** to show it.
   - In the **Show these columns in this order** list, select a column and click **Remove** to hide it.
   - Use the arrows to arrange the columns in the left-to-right order you want. The highest columns appear furthest to the left.

   You can also drag and drop to move columns between panes and reorder them.

3. Click **OK**.

Moving columns

To move a column, click its header and then drag and drop it to a new location. You can also move columns by using the Show Columns dialog (see the previous section).

Resizing columns

You can change column widths by dragging the sides of the column headers.

Sorting by column

Click a column header to sort the items in a folder by the information in that column. Click the column header again to sort in the reverse order.

The column in the folder that contains an arrow is the column by which the display is currently sorted. The direction of the arrow indicates the order.

Other customization options

The following table refers you to customization options described elsewhere in this manual.

Feature	Description	See page
Recording greetings	Create recordings that callers hear when they reach your voicemail.	7-23
Automatically logging on	Log on to ViewPoint without needing to enter your password.	2-7
Changing your password	Change the password you use to log on to Wave	2-17

Feature	Description	See page
Displaying the Call Monitor folder automatically	Bring ViewPoint to the front with the Call Monitor showing when you place calls from ViewPoint.	5-6
Setting e-mail and pager notification	Receive an e-mail message or a page whenever you have new voice messages.	7-14
Setting deletion options	Choose how voice messages are permanently deleted from the Deleted folder.	2-33

Running Contact Center Reports

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Important: You can use the Contact Center Reporter to report on non-queue call activity and phone usage, even if you are not an agent in a Contact Center queue. The available reports are listed on the next page, and are described in more detail on page 13-13. Once Wave Contact Center is generally available, additional reports will be available.

About the Contact Center Reporter

The Contact Center Reporter allows you to run more than a dozen detailed reports on call activity and phone usage in Wave. You run reports on both queue calls and activity that has nothing to do with queues, such as general user and trunk usage. By carefully tracking the relevant call activity, you can quickly identify how effectively your phone system is being used by agents, queues, or trunks.

With the Contact Center Reporter, you can also analyze general system data not related to call distribution systems, such as the activity on your trunks.

You can configure each report to show information over any time period, from a single day to months or even years.

Note the following:

- You cannot run reports on time periods for which you have archived the Call Log. Archiving removes information from the Wave database and makes it unavailable for reports.
- If you are running the Contact Center Reporter on a computer other than the Wave Server, make sure that the clocks on the two computers are synchronized. All report times and dates are based on the clock of the local PC.

Contact Center Reporter requirements

To run the Contact Center Reporter, you need the following:

- Microsoft Excel 2003 SP3 or higher must be installed on the ViewPoint PC.
- Wave permission to run reports. You must have the permission **Access Contact Center Reporter** set to Allow. See Chapter 11 in the *Wave Global Administrator Guide* for instructions on setting permissions.
- A Contact Center Reporter license is required to run many reports. However, you ***do not*** need a Contact Center Reporter license to run the following reports:
  - Call Log report
  - Call Transfer report
  - Grouped Service Level report
  - Outbound Call Comparison report
  - Outbound Calls By Phone Number report
  - Outbound Long Distance Summary report
  - Unanswered Calls During Business Hours report
  - User Call Trends report
- To avoid a potential error when running reports, you must obtain the following updates from the Microsoft Download Center (www.microsoft.com/downloads) and install them on the ViewPoint PC:
  - KB955466 (Excel 2003 update)
  - KB907417 (Office 2003 update)

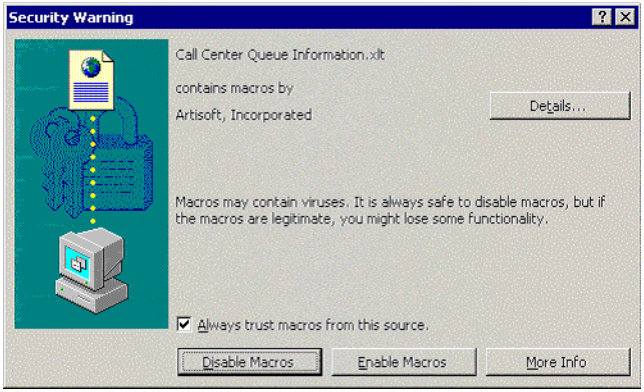
Running a report

The following steps describe how to start the Contact Center Reporter and run a report.

Note: To run some reports, you must first define general Reporter options. See “Setting general Reporter options” on page 13-6.

To run a Contact Center report

1. In ViewPoint, choose **Tools > Reports**. The Contact Center Reporter dialog opens.
2. Click the name of the report that you want to run. The report template opens in Microsoft Excel and shows data according to the options most recently selected for that report.
3. If the following prompt regarding macros appears while Excel is opening, check **Always trust macros from this source**. Then click **Enable Macros**.



4. The Options dialog for the selected report opens. If it does not, click Report Options on the Excel Reporter toolbar. (See “Using the Contact Center Reporter toolbar in Excel” on page 13-4.)
5. In the Options dialog, modify the report parameters to focus on the time period or other information that you are interested in. See “Setting individual report options” on page 13-8 for more information.
6. Click **OK**. The report runs and is displayed in Excel. Use Excel’s options to view the report in graphical or spreadsheet format.
7. The Reporter dialog remains open. To run another report, click another report name.

Viewing report headers and footers

You must have a printer installed on your computer in order to view the headers and footers on reports. The headers and footers include such data as report title, agent and queue name, date range, date printed, and the days of the week for the report. If you do not have a printer (local or network) configured on your computer, the headers and footers will be blank.

Using the Contact Center Reporter toolbar in Excel

Wave makes Contact Center Reporter options available to you from within Excel on the Reporter toolbar. To display the Contact Center Reporter Toolbar in Excel, choose **View > Toolbars > Contact Center Reporter Toolbar**.

Note: For the Contact Center Reporter toolbar to be available, you must have opened a report from the Contact Center Reporter dialog.

The Contact Center Reporter toolbar offers buttons for the commands listed in the following table.

	New Wave Report. Opens the Reporter dialog or brings it to the front if it is already open, so that you can select a report to run. See “Running a report” on page 13-3.
	Export without Macros. Saves the report so that it can be opened in Excel on any PC. Reports saved with macros can be opened only on PCs with Wave applications installed.
	Report Options. Opens the Report Options dialog for the report currently showing, so that you can change the report parameters and run the report again.
	Refresh Report. Runs the report again with the same options as were used to generate the current report. Use to update the report with the latest data.
	Help. Opens the Contact Center Reporter online Help.

Shared and local reports

Reports can be either shared or local, as follows:

- **Shared reports** are stored on the Vertical Wave Server and can be run from any ViewPoint PC. Shared reports are indicated in the Reporter dialog by (blank report) or (report with data) in the Shared/Data column.

  The default path for shared reports on the Wave Server is:

  ```
  C:\Program Files\Vertical Wave Server\Reports
  ```

- **Local reports** are stored on the ViewPoint PC itself, and can only be run from that PC. Local reports are indicated in the Reporter dialog by in the Shared/Data column.

  The default path for local reports is:

  ```
  C:\Program Files\Vertical Wave\ViewPoint\Reporter\Reports
  ```

The reports that come with Wave are all shared reports.

To share a local report

1. Select the report in the Reporter dialog.
2. Choose **File > Share**.

After sharing a report, click the **Refresh Report** button on the Reporter dialog toolbar to see the shared report in the Reporter dialog.

Reporting on outbound Contact Center calls

For agents' outbound calls to appear in reports, the agents must place their calls as the queue rather than as themselves. To do so, use the ViewPoint status bar. See "The Status Bar" on page 2-21.

Backups of original reports

Because a user can accidentally overwrite a shared report by sharing one of his own reports with the same name, backup copies of the original Wave report templates are provided in the `Reports_backup` directory in the Wave Server directory.

Do not modify Contact Center report templates!

Important: Wave maintains report template (.XLT) files on the ViewPoint PC for its internal use. Do not modify these as a means of editing the Wave reports. If you do, your changes will be lost, because Wave regularly overwrites the reports. To modify a report template, save the XLT file with a different name so that it is not overwritten by the Reporter.

Setting Reporter options

You set Reporter options in several ways:

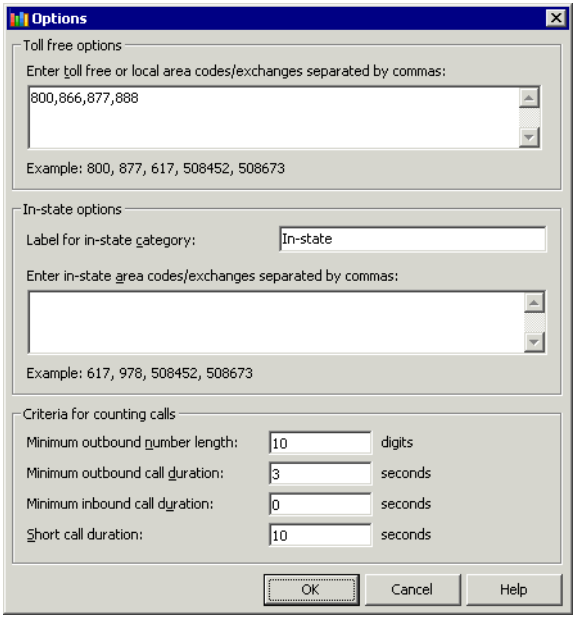
- Setting general Reporter options. See page 13-6.
- Setting individual report options. See page 13-8.

Setting general Reporter options

Some reports will not run unless you have set general Reporter options. To do so, you must have Administrator permissions.

To set general Reporter options

1. From the Reporter, choose **Tools > Options**. The Options dialog opens.



2. Under **Toll-free options**, enter the prefixes of phone numbers that are free to dial from the local Wave Server. These include your local area code as well as any toll-free area codes such as 800 and 888. Separate entries with commas. You do not need to enter long-distance prefix digits, such as the “1” in the U.S.

   If your entire local area code is not free, you can enter each free exchange as the area code plus exchange, for example 508452, 508673.

3. Under **In-state options**, use the following fields to define how in-state calls appear on the outbound call reports:

   - **Label for in-state category.** Type the name for in-state calls that will appear on the x-axis of reports that use this option.
   - **Enter in-state...** Enter a list of area code and exchanges that are in your State but not free, for example area codes in your State other than your local one. You do not need to enter long-distance prefix digits, such as the “1” in the U.S.

4. Under **Criteria for counting outbound calls**, use the following fields to define which calls are counted in various report categories:
   - **Minimum outbound number length.** In North America this field should be left at 10 so that the reports pick up all long-distance calls. Further filtering, for example for the Outbound Long Distance Summary report, will be provided by the toll-free and in-state fields above.
   - **Minimum inbound/outbound call duration.** These two fields ensure that the reports count only calls that were connected. You can adjust the setting as desired. A setting of 1 second is generally sufficient to include all connected calls.
   - **Short call duration.** Enter the number of seconds at or below which a call is considered a "short call" by various reports, such as the Agent Performance by Skill report.
5. Click **OK**.

Setting individual report options

The Options dialog appears automatically whenever you run a report, letting you specify the parameters for the report. You can also click **Report Options** on the Reporter toolbar to change a report's parameters and run it again, for example, with a different date range.

The following options are available for most reports:

- **Queue.** Select the queue on which you want to run the report.
- **Agent.** Select the agent on whom you want to run the report.
- **Period.** Select the time frame for which you want to report. Use the **Start** and **End** fields for custom time frames.
- **Interval.** Select the length of time reflected by the report, such as hours, days, or months. The time periods appear on the x-axis of the report.

Click **OK** in the Report Options dialog to run the report according to the options that you selected.

Using Excel tabs to view report results

Most Wave reports contain the following tabs in Excel:

- **Report.** A graphical presentation of the data.
- **Data.** A numerical presentation of the data.
- **Report Options.** A worksheet showing the options selected for the report.

Totals on the Data tab

Sometimes totals on the Data tab appear to be inaccurate. This is usually due to the way Excel presents numbers, rounding them to the number of displayed digits. The total is always formed by taking the sum of the complete numbers, then rounding. For example:

	6.47 5.87	6.4650 5.8699
Totals	12.33	12.3349

Using the Report Options tab in Excel

Most users should not try to change the report parameters by changing the data on the Report Options tab. Instead, click **Report Options** on the Reporter toolbar and enter new parameters in the Options dialog, as described earlier in this section.

The Report Options tab in Excel is for those who want to print out the full workbook, with a record of the selected options. Macro writers and other skilled spreadsheet users can also use the tab to generate reports without using the Report Options dialog.

Printing and scheduling reports with the Report Runner

The Report Runner enables you to create a desktop shortcut for running and printing a report. You can then run the report just by clicking the shortcut. You can choose whether to send the report to a printer or a file.

You can also use the Windows Task Scheduler to run the Report Runner at any time and interval you choose. See Windows Online Help for the Task Scheduler for more information.

To create a Report Runner shortcut for running a report

1. Create a shortcut to the Report Runner file, `Tvrrun.exe`. The default location for the Report Runner file is:

   ```
   C:\Program Files\Vertical
   Wave\ViewPoint\Reporter\TVRRun\Tvrrun.exe
   ```

   For instructions on creating a shortcut, see your Microsoft Windows documentation.

2. Right-click the shortcut and choose **Properties**.

3. In the **Target** field, add the following after the path:

   - The path to the XLS file of the report you want to run.
   - (optional) -C to send the chart report to your default printer.
   - (optional) -T to send the data report to your default printer.
   - (optional) -S <output file> to print the report to a file. If you do not specify an output file, the new report overwrites the source XLS file. **Note:** Do not use quotes around the file path.

   See the next section for examples of the **Target** statement.

4. To set report options, such as queue name or selected hours, use the Report Options tab in your saved XLS spreadsheet file. See “Using the Report Options tab in Excel” on page 13-9.

5. Click **OK**.

Examples of the shortcut Target statement

The following are examples of how the shortcut's **Target** field might look:

- `C:\Program Files\Vertical Wave\ViewPoint\Reporter\TVRRun\ Tvrrun.exe C:\Program Files\Vertical Wave\ViewPoint\Reporter\ Reports\Wait by Outcome1.xls –C`
- The chart for the Wait by Outcome1.xls report is sent to the printer.
- `C:\Program Files\Vertical Wave\ViewPoint\Reporter\TVRRun\ Tvrrun.exe C:\Program Files\Vertical Wave\ViewPoint\Reporter\ Reports\Trunk Performance.xls –C –T`
- The chart and the data sheet for the Trunk Performance Report are sent to the printer.
- `C:\Program Files\Vertical Wave\ViewPoint\Reporter\TVRRun\ Tvrrun.exe C:\Program Files\Vertical Wave\ViewPoint\Reporter\ Reports\User Activity.xls –S`
- The XLS file of the User Activity report is overwritten with the new report.
- `C:\Program Files\Vertical Wave\ViewPoint\Reporter\TVRRun\ Tvrrun.exe C:\Program Files\Vertical Wave\ViewPoint\Reporter\ Reports\User Activity.xls –S C:\Program Files\Vertical Wave\ViewPoint\Reporter\Reports\Fred_Sanders.xls`
- The User Activity report is written to the file Fred_Sanders.xls in the Reports directory (Note no quotes around the file path).

Using the Report Runner

When running or scheduling reports automatically with the Report Runner, you must do the following:

1. Run the report manually for the user you want and for the period you want.
2. Clear all sheets except for the "Report Options" sheet. (Click the top left cell to select all, then press **Delete**.)

3. On the “Report Options” sheet, do the following:
   - Clear the date range in the “Period” row (column B).
   - Clear the data in the “Days” row (columns B and C).
   - In “Days” row (column B) enter 1,2,3,4,5,6,7.
   - In the “Days” row (column C) enter Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday.
4. Save the report (name it something like “User Template.xls”).
5. Set up the Report Runner to use this template every day to generate the report. An example command line would look like this:

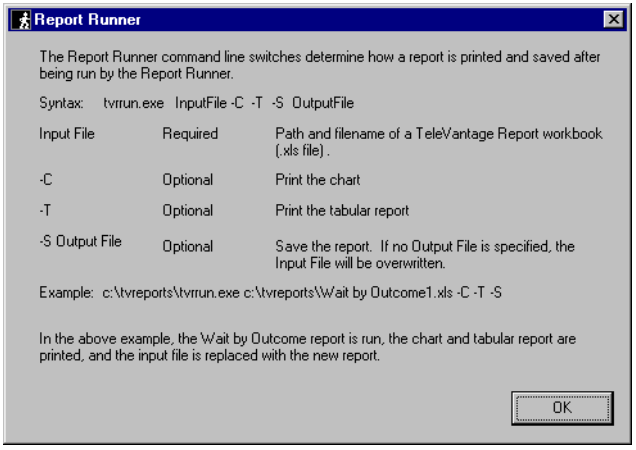
   ```
   C:\Reports\User Template.xls –S C:\Reports\User3.xls
   ```

Note the following:

- If the query generates no data, the existing report will be cleared, so you won't see the data from the previous execution.
- The “Days” option in the template will be ignored if the period is “Today” or “Yesterday.” In that case the day used will be the appropriate one for the period chosen.

Running the Report Runner without a command line statement

If you run the file `Tvrrun.exe` without modifying its command line, the system opens a Help topic that explains the Report Runner commands.



Available reports overview

You can produce the reports listed in the following table. For detailed examples of the reports, see the sections referenced in the table.

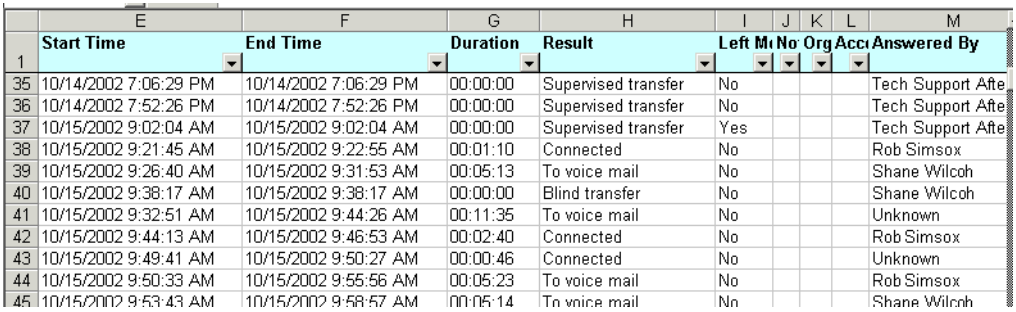
Name	Description
Call Log report (see page 13-14)	By any time interval, shows all the information that appears in the Call Log for the entire system or the selected user or queue, in a spreadsheet form that is easy to sort or filter.
Call Transfer report (see page 13-16)	By any time interval, reports on all of the calls transferred to another entity by a user, Contact Center queue, or ViewPoint Group.
Grouped Service Level report (see page 13-17)	By five-second increments, shows wait time for all external calls that were answered by a user.
Outbound Call Comparison report (see page 13-18)	Shows the number and duration of outbound calls in the following categories: In-state, Toll-free, and Other.
Outbound Calls by Phone Number report (see page 13-19)	Shows the number and duration of outbound calls placed to prefixes that you specify, for example 800 or 212.
Outbound Long Distance Summary report (see page 13-20)	By any time interval, shows your outbound long-distance phone traffic and estimates your phone bill.
Unanswered Calls During Business Hours report (see page 13-22)	By any time interval, shows external inbound calls during your Wave business hours that were not answered by a user.
User Call Trends report (see page 13-23)	Shows the number of calls a user made or received and the user's average talk time.

Call Log report

The Call Log report shows all the information that appears in the Call Log for a user or a queue, in a spreadsheet form that is easy to sort or filter. Using Microsoft Excel's drop-down filtering tools, you can filter by any column to see just the calls you want.

This report should only be run for a small number of days due to the quantity of data it can produce.

Note: By default you can report only on your Call Log and all Call Logs that are visible to you in ViewPoint (for example, a queue's Call Log if you have permission to view it, and any Call Logs that have been shared with you). To report on any Call Log, you must have the Wave permission **Report on all call logs** set to Allow. See Chapter 11 in the *Wave Global Administrator Guide* for more about setting general Wave permissions.

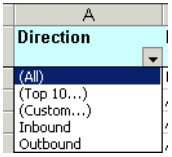


	E	F	G	H	I	J	K	L	M
1	Start Time	End Time	Duration	Result	Left M	No	Org	Acc	Answered By
35	10/14/2002 7:06:29 PM	10/14/2002 7:06:29 PM	00:00:00	Supervised transfer	No				Tech Support Afte
36	10/14/2002 7:52:26 PM	10/14/2002 7:52:26 PM	00:00:00	Supervised transfer	No				Tech Support Afte
37	10/15/2002 9:02:04 AM	10/15/2002 9:02:04 AM	00:00:00	Supervised transfer	Yes				Tech Support Afte
38	10/15/2002 9:21:45 AM	10/15/2002 9:22:55 AM	00:01:10	Connected	No				Rob Simsox
39	10/15/2002 9:26:40 AM	10/15/2002 9:31:53 AM	00:05:13	To voice mail	No				Shane Wilcoh
40	10/15/2002 9:38:17 AM	10/15/2002 9:38:17 AM	00:00:00	Blind transfer	No				Shane Wilcoh
41	10/15/2002 9:32:51 AM	10/15/2002 9:44:26 AM	00:11:35	To voice mail	No				Unknown
42	10/15/2002 9:44:13 AM	10/15/2002 9:46:53 AM	00:02:40	Connected	No				Rob Simsox
43	10/15/2002 9:49:41 AM	10/15/2002 9:50:27 AM	00:00:46	Connected	No				Unknown
44	10/15/2002 9:50:33 AM	10/15/2002 9:55:56 AM	00:05:23	To voice mail	No				Rob Simsox
45	10/15/2002 9:53:43 AM	10/15/2002 9:58:57 AM	00:05:14	To voice mail	No				Shane Wilcoh

For a description of the Call Log columns, see Chapter 8 in the *Wave ViewPoint User Guide*.

Filtering Call Log data by column

To filter the report by column, click the arrow on any column header. From the drop-down list, select the column entry that you want to display. The report shows only calls with that column entry. Alternately, select **Custom** to filter by more complex criteria.

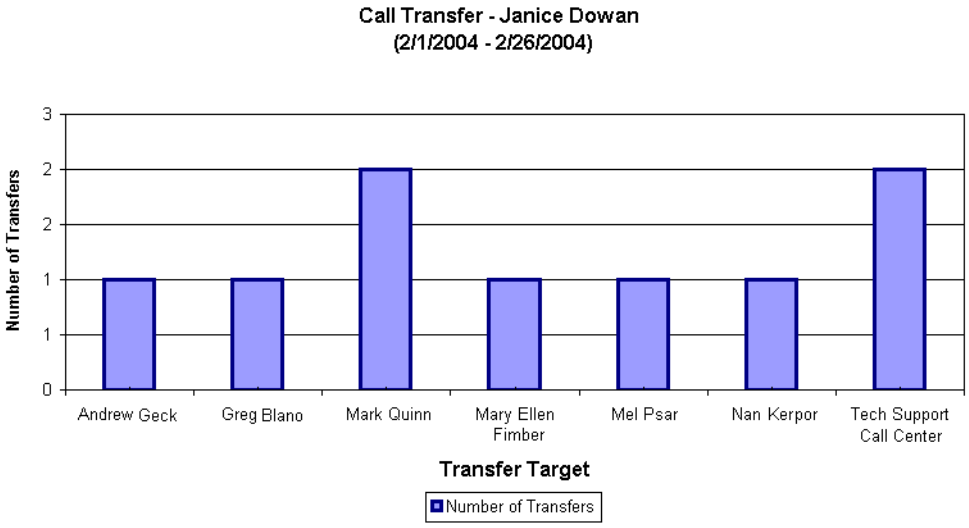


Examples of using the filter include viewing the following:

- All calls with account code 55 (Account Code column)
- All inbound or all outbound calls (Direction column)
- All calls longer than 30 minutes (Duration column, select **Custom**)
- All abandoned calls (Result column)
- All calls that were automatically recorded by the queue (Recorded by Queue column)

Call Transfer report

This report shows how many calls were transferred by all users, an individual user, a queue, or a ViewPoint Group during the reporting period, and to whom the calls were transferred.



Reading the Call Transfer report

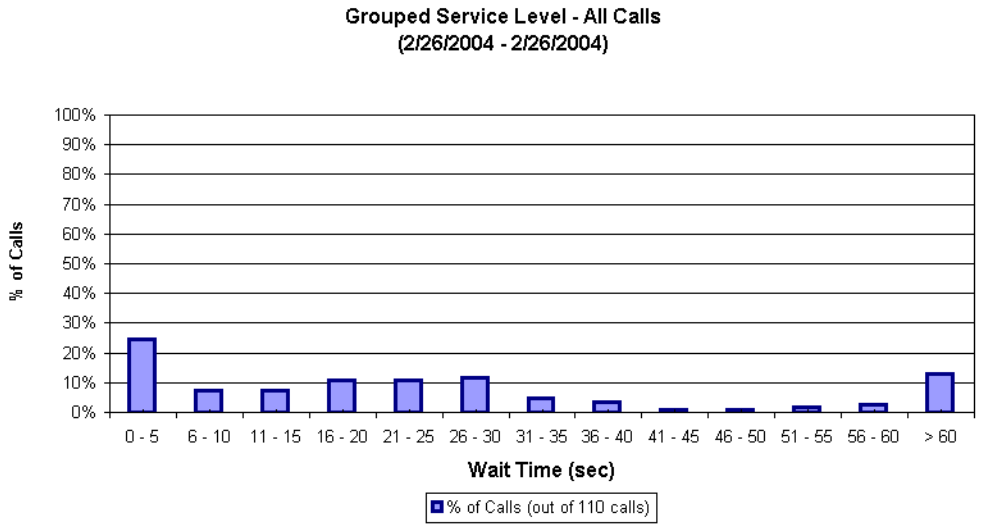
The following fields appear in this report:

- **Number of transfers.** Displays on the y-axis of the report.
- **Transfer Target.** Each entity to which a call was transferred appears as a bar along the x-axis of the report.

On the Data tab, the **Inbound Calls** column displays the total number of inbound calls received by the transfer target during the reporting period, allowing you to compare the number of calls received by vs. transferred to the target during that period.

Grouped Service Level report

This report shows wait time for all external calls, displayed in five-second groupings. Wait time includes the amount of time that the caller waited between the extension being dialed and the user picking up, plus any time spent in a blind transfer later in the call. Note that wait time does not include time that the caller spent on hold, parked, or in a supervised transfer.



Reading the Grouped Service Level report

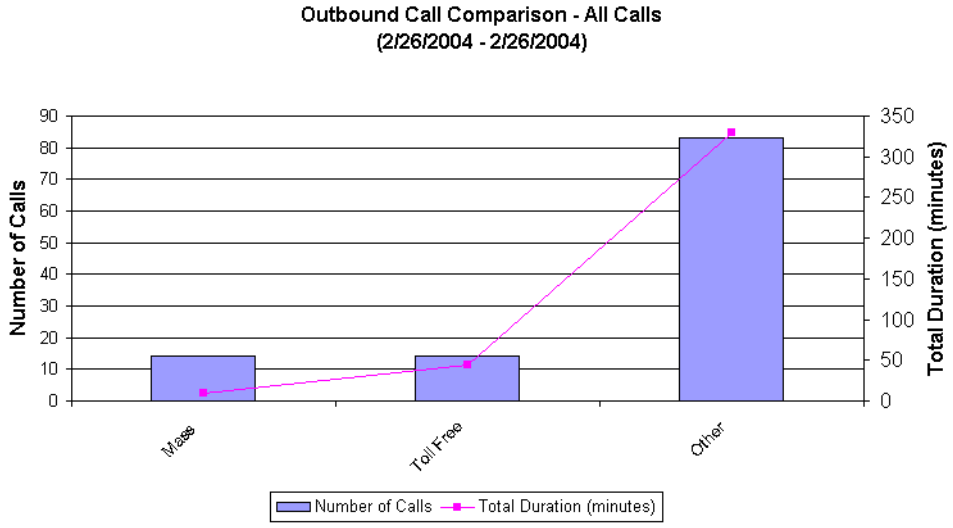
The following fields appear in the Grouped Service Level report:

- **Wait Time.** Displays on the x-axis of the report as five-second groupings
- **% of Calls**. Shows how each grouping compares as a percentage of the total number of calls. Displays on the y-axis of the report. The total number of calls is displayed at the bottom of the report.

Outbound Call Comparison report

The Outbound Call Comparison report separates your outbound calls into three categories: In-state, Toll-free, and Other. The In-state and Toll-free categories depend on your settings in the general Reporter Options dialog (see “Setting general Reporter options” on page 13-6).

Standard long-distance calls (calls made to non-free area codes) are included under “Other.”



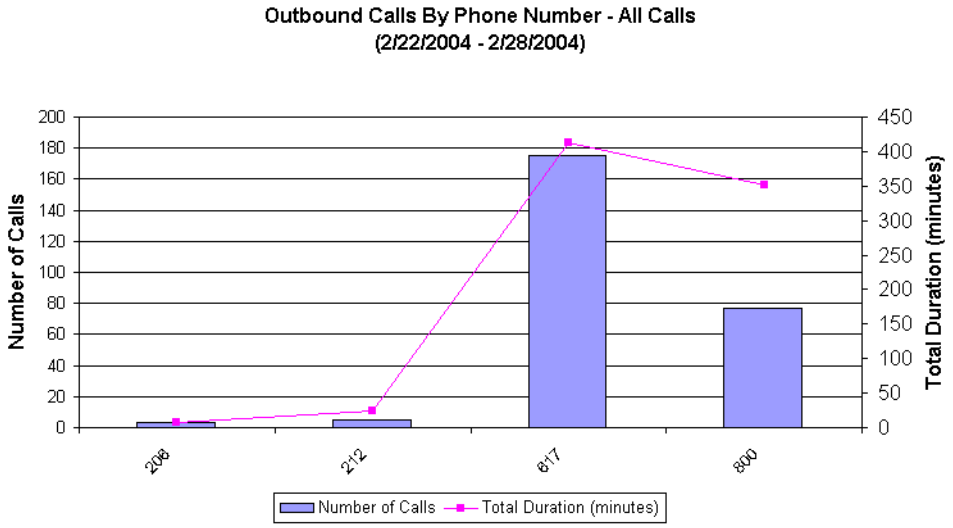
Reading the Outbound Call Comparison report

The following fields appear in the Outbound Call Comparison report:

- **Interval.** Displays as the x-axis of the report.
- **Number of Calls.** Displays as bars. Read against the left y-axis of the report.
- **Total Duration.** Displays as a line. Read against the right y-axis of the report.

Outbound Calls by Phone Number report

This report counts the number and duration of outbound calls placed to a specified list of phone number prefixes. Enter the prefixes in the **Number prefixes** field in the Options dialog for this report (separate prefixes with commas).



Note: If your prefixes overlap, a call can show up in more than one column. For example, if you enter a prefix of 6 and another of 617, calls beginning with 617 will be counted in both columns.

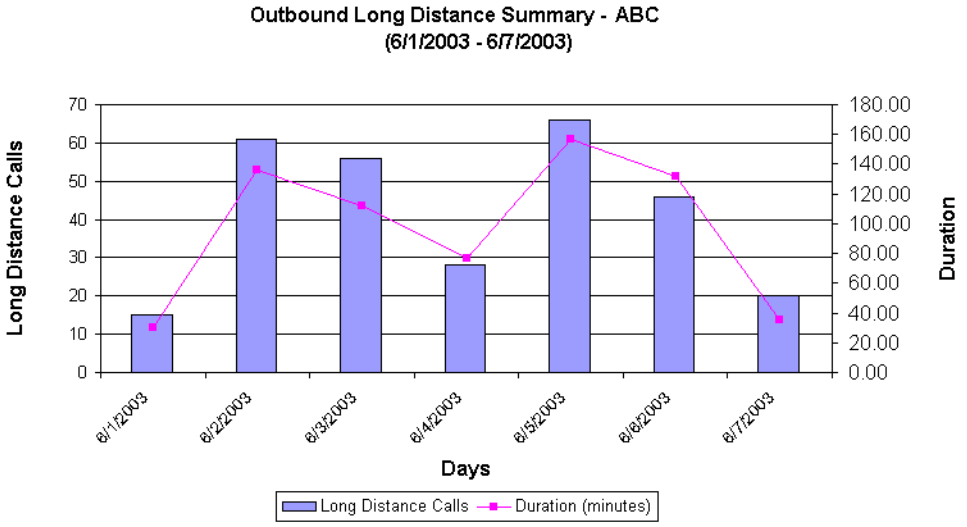
Reading the Outbound Call by Phone Number report

The following fields appear in the Outbound Calls by Phone Number report:

- **Number prefixes.** The prefixes you entered appear as the x-axis of the report.
- **Number of Calls.** Displays as bars. Read against the left y-axis of the report.
- **Total Duration.** Displays as a line. Read against the right y-axis of the report.

Outbound Long Distance Summary report

You can use this report to track your outbound long-distance phone traffic and estimate a phone bill for a given period. The chart displays the total number of outbound long distance calls and the duration of each. The Data tab shows the estimated cost of your long distance calls.



Before running the Outbound Long Distance Summary report

You cannot run the Outbound Long Distance Summary report unless your system has been set up in the following way:

- One or more Organizations are defined. See Chapter 20 in the *Wave Global Administrator Guide* for more about using Organizations.
- In-state area codes are defined in the Reporter Options dialog.

When setting up the Options for this report, specify the following additional fields. Your long distance carrier can provide you with exact numbers.

- **Cost per minute.** Enter the per-minute cost in dollars of your long-distance calls. For example, enter .05 for five cents a minute.
- **Cost interval in seconds.** The length of the intervals a minute is divided into for the purposes of calculating the cost of the call.

Reading the Outbound Long Distance Summary report

The following fields appear on the Outbound Long Distance Summary report:

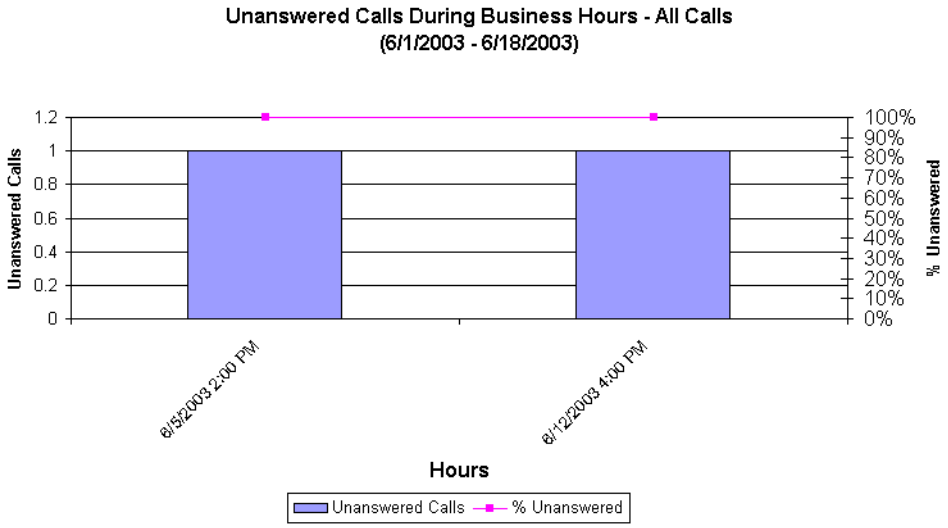
- **Interval.** Displays along the x-axis of the report.
- **Long Distance Calls.** All outbound trunk calls whose numbers do not begin with any of the digit sequences listed in the **Toll free options** field in the Reporter Options dialog. Displays as bars. Read against the left y-axis of the report.
- **Duration.** Displays as a line. Read against the right y-axis of the report.

The following fields appear on the Data tab of this report. Each is totaled at the bottom.

- **Interval.** The time interval chosen.
- **Outbound calls.** The total number of outbound trunk calls, long distance or otherwise. Note that to count as an outbound call, a call must match the **Criteria for counting outbound calls** defined in the Reporter Options dialog (see “Setting general Reporter options” on page 13-6).
- **Long distance calls.** The total number of long distance calls.
- **Duration.** The total duration of long distance calls for each interval.
- **Cost.** The total cost of long distance calls for each interval, based on the **Cost per minute** and **Cost interval in seconds** data you entered.

Unanswered Calls During Business Hours report

The Unanswered Calls report shows external inbound calls during your Wave business hours that were not answered by a user. This includes calls that were answered by another extension type, such as a queue or an auto attendant, but never picked up by a user.



Note: The report counts calls that show a **Result** of "Abandoned" or "To voicemail" in the Call Log. Because of this, calls that a user answered and then sent to voicemail count as unanswered.

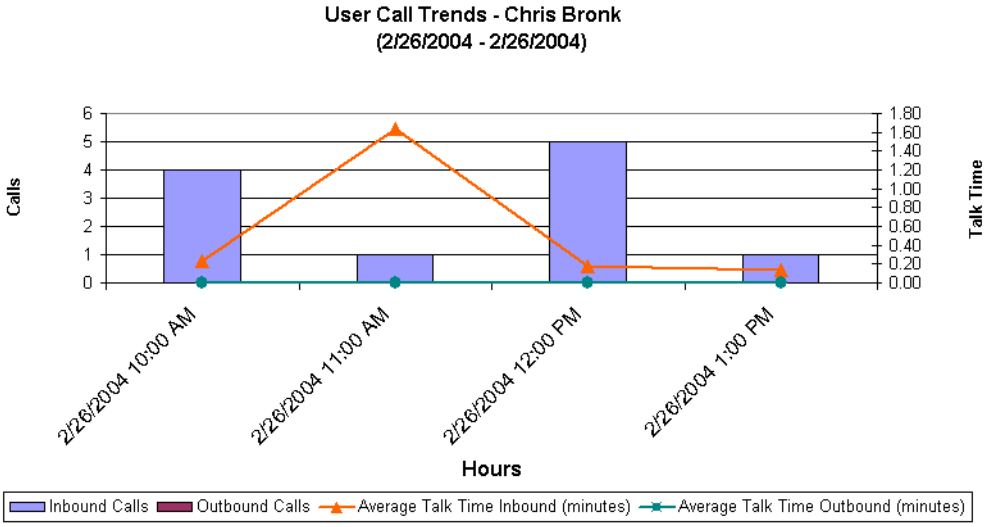
Reading the Unanswered Calls During Business Hours report

The following fields appear on the Report tab of the Unanswered Calls During Business Hours report:

- **Time interval.** Displays as the x-axis of the report.
- **Unanswered Calls.** Total number of unanswered calls. Displays as stacked bars. Read against the left y-axis of the report.
- **% Unanswered Calls.** Unanswered calls as a percentage of all calls. Displays as a line. Read against the right y-axis of the report.

User Call Trends report

The User Call Trends report displays the number of inbound calls a user received and outbound calls the user placed, with the average talk time for each category.



Reading this report

The following fields appear in this report:

- **Time interval.** Displays as the x-axis of the report.
- **Calls.** The number of calls. Displays as the y-axis of the report.
- **Inbound calls / Outbound calls.** Displays as different-colored bars.
- **Average talk time Inbound/Outbound.** In minutes. Displays as two lines.

Using the Wave Archived Recording Browser

APPENDIX CONTENTS

About the Wave Archived Recording Browser A-1
Running the Archived Recording Browser. A-2
Searching for recordings A-3
Managing individual recordings A-10
Acting on archived call recordings. A-11
Checking the archive for missing audio files A-13
Purging archived recordings A-14

About the Wave Archived Recording Browser

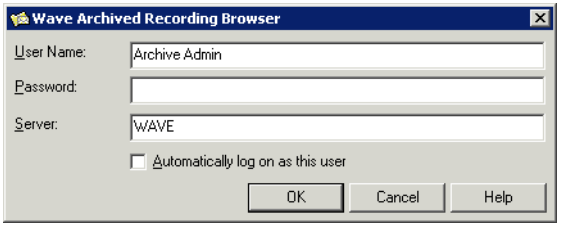
The Wave Archived Recording Browser is a tool for listening to and managing thousands of mailbox recordings (voice messages or call recordings) that have been archived by Wave. You can search for recordings using a variety of criteria, edit or delete recordings, flag recordings for follow up, or restore them to the appropriate Inbox or other folder from which they were archived.

Running the Archived Recording Browser

In order to use the Archive Recording Browser, you must know the network location of the archive and have network access to that location. See your Wave system administrator for details.

To run the Archived Recording Browser

1. Choose **Start > Programs > Vertical Wave > Wave Archived Recording Browser**. The Wave Archived Recording Browser dialog opens:



2. Enter your archive user **User Name** and **Password**. These can be different than your Wave user name and password—ask your Wave system administrator for the user name and password to use.
3. To log on to a different archive PC, enter that PC's name or IP address in the **Server** text box.
4. Click **OK**.

After using the Archived Recording Browser, to log on as another archive user (for example, as a user with different access privileges), click **File > Log On as a Different User**, and then enter that archive user's **User Name** and **Password**.

Searching for recordings

The Archived Recording Browser does not display any entries when you run it. To view recordings in the Browser window, you must first search for recordings that match criteria that you set.

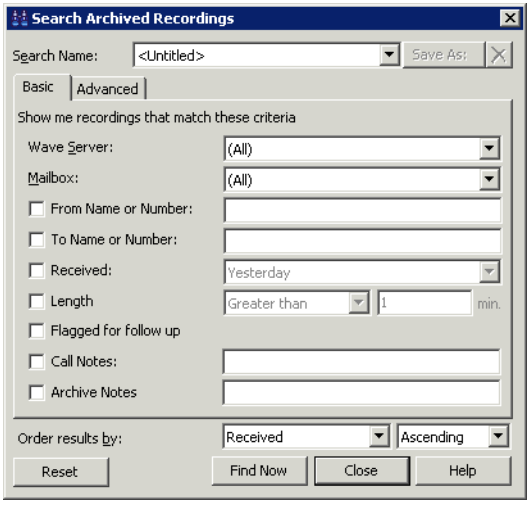
To search for recordings, use either of the following methods:

- Start a new search. See page A-3.
- Load a saved search. See page A-9.

Starting a new search

To start a new search

1. Click on the toolbar. The Search Archived Recordings dialog opens.

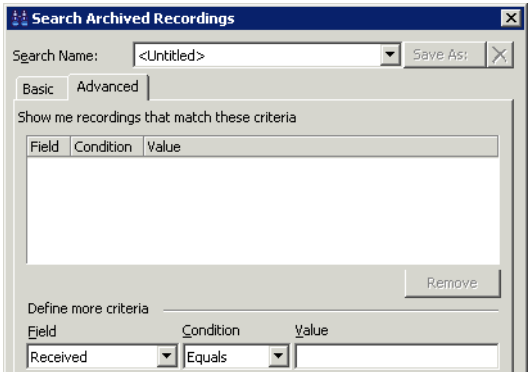


2. Do one of the following:

   - **If your search only involves basic criteria**. Click the Basic tab to quickly specify commonly-used criteria. Anything you enter on the Basic tab is treated as a partial search. For example, entering "617" in the **From Name or Number** field will return all records with 617 in that field, including "61755511212", and "5126175555".

     Example: For a description of each field on the Basic tab, see "Search criteria" on page A-5. When you are done specifying your search criteria on the Basic tab, go to step 3.

   - **If you want to specify more complex search criteria**. Click the Advanced tab to search on additional fields in the mailbox recording's Call Log entry, or to define more complex search criteria than you can specify on the Basic tab.

     Example: For a description of each field on the Advanced tab, see "Search criteria" on page A-5.

     Example: Click **Add to List** after defining each entry. To remove an entry from the list, select it and then click **Remove**.

3. On either tab, you can specify how the results will be sorted. From the **Order results by** drop-down lists, select the Browser column on which to sort the search results. Then select **Ascending** or **Descending** from the drop-down list to specify how to sort the contents of that column.

   Note: Search results can also be sorted by clicking any column header in the Archived Recording Browser.

4. When you are done specifying your search criteria on either tab, do any of the following:
   - To execute the search, click **Find Now.**
   - To reuse the search criteria again at a later time, click **Save As.** In the Save Search As dialog, **Enter a name for your search** and then click **Save**.
   - To reset the contents of the Search Archived Recordings dialog to the default settings, click **Reset**.

Search criteria

The following table describes the search criteria that you can set up on either the Basic or Advanced tab in the Search Archived Recordings dialog:

Search Criteria

Tab	Field	Description
Basic	**Wave Server**	If your system archives mailbox recordings from more than one Wave Server, you can search all of the Servers, or select a specific Server from the drop-down list.
	Mailbox	You can search all users' mailbox folders, or select a specific user from the drop-down list.
	From Name or Number	To search for recordings related to calls from a specific user or number, select this checkbox, and then enter all or part of the user's name (for example, "Janice" or "Jan") or phone number (for example, "17815551212", or "781".) To search for calls from an external caller, enter "Unknown".
	To Name or Number	To search for recordings related to calls placed to a specific user or number, select this checkbox, and then enter all or part of the user's name or phone number.
	Received	To limit your search to a specific time period, select this checkbox, and then select a time period from the drop-down list (for example, "Yesterday" or "Last 3 months".) If you select "Specific date", enter the date in the text box using the format provided, or click … to select a date from a calendar.

Search Criteria ***(continued)***

Tab	Field	Description
	Length	To search for recordings of a specific length, select this checkbox. Select an option from the drop-down list, and then enter the number of minutes in the text box (for example, “Within 30 sec.of 5 minutes”.) **Note:** To enter seconds, use the hh:ss format or decimal places. For example, to indicate 1 minute 30 seconds, enter either “1:30” or “1.5”.
	Flagged for follow up	To search for recordings that were previously flagged for follow up, select this checkbox.
	Call Notes	To search for recordings that contain a specific text string in the **Call Notes** field, select the checkbox, and then enter the string in the text box.
	Archive Notes	To search for recordings that contain a specific text string in the **Archive Notes** field, select this checkbox, and then enter the string in the text box.
Advanced	**Show me recordings that match these criteria**	Lists one or more criteria that you specify on the Advanced tab. To remove an entry from the criteria list, select it and then click **Remove**.
	Define more criteria	To add an entry to the criteria list, select a **Field** and **Condition** from the drop-down lists, and then select a **Value** from the drop-down list or enter it in the text box (for example, “Account Code Equals 1074”.) To search for recordings that match one of several values in a single field, select the condition **Or**. When you use **Or**, you must specify the complete field contents that you are searching for, as in: “From Or Nancy Jones OR Pete Smith OR Irene Orleans”.

Search Criteria ***(continued)***

Tab	Field	Description	
	Field	Field on which the search criteria is based. For a description of each field, see “Using the Call Log view” in Chapter 22 in the *Wave Global Administrator Guide*.	
	Condition	Select any of the following conditions.	
		Equals, Does not equal	Use to search based on the exact contents of a field. For example, to search for recordings of calls from Kevin McDonough, add the criteria “From Equals Kevin McDonough”. Note that when you use **Equals** and **Does not equal**, you cannot search based on part of the field’s contents—the criteria “From Equals Irene” would not return any matches. **Equals** is the only valid condition for some fields (**Flagged for follow-up**, **Message Heard**, **Call Direction**, **Call Result**, **Left Message**, and **Recorded By**.) For these fields, select one of the values offered in the drop-down list, for example, “Call Result Equals Left Message”.
		Greater than, Less than	Use to search based on the numeric contents of a field. For example, to search for recordings of calls that were on hold for more than 10 minutes, add the criteria “Hold Time Greater than 10”.
		Between	Use to search based on a range of values for a field. For example, to search for recordings of calls that lasted more than 10 but less than 20 minutes, add the criteria “Call Duration Between 10 and 20”.

Search Criteria ***(continued)***

Tab	Field	Description	
		Or	Use to search for recordings based on two or more values for a field. For example, to search for recordings of calls from several callers, add a criteria like “From Or Nancy Jones OR Pete Smith OR Irene Orleans”.
		Like	Use to search based on wildcard characters that represent one or more characters. Use a question mark (?) to represent a single alphanumeric character. For example, to search for recordings of calls from the 617 area code and 555 exchange, add the criteria, “Number Like 617555????”. Use an asterisk (*) to represent one or more alphanumeric characters. For example, to search for recordings of calls from anyone with a first name of Nancy, add the criteria “From Like Nancy”. You can combine wildcard characters in a single search criteria. For example, to search for recordings from calls from an area code that begins with 8 and has the 555 exchange, add the criteria “Number Like “8??555*”. Note that if you want to search for the actual character * or ?, use the **Equals** or **Does not equal** condition.

Search Criteria ***(continued)***

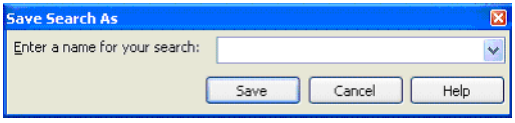
Tab	Field	Description	
		Contains	Use to search based on a portion of a field. For example, to search for recordings of calls where 555 appears anywhere in the number, add the criteria “Number Contains 555”.
	Value	Field contents for which to search. Note that when searching on the contents of a time-based fields (**Call Duration**, **Hold Time**, and so forth), the value is always entered in minutes.	

Saving your current search

There are two ways to save your current search criteria in order to search using the same criteria at a later time:

1. In the Search Archived Recordings dialog, click **Save As**, or in your Browser, click on the toolbar.

   The Save Search As dialog opens.



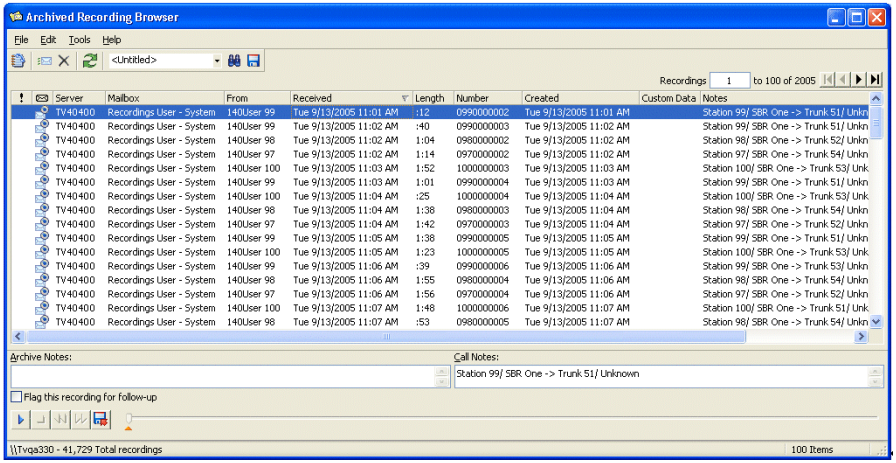
2. Enter a name for your search and then click **Save**.

Loading a saved search

To load a saved search, select it in the drop-down list on the toolbar. To change the search criteria for a saved search, select it and then choose **Tools > Find**. The Search Archived Recordings dialog opens where you can make your changes.

Managing individual recordings

Mailbox recordings that match your search criteria are displayed in the Browser.



The following information is displayed for each recording:

- If , recording has been flagged for follow-up.
- Identifies the recording type:
  - Voice message
  - Call recording
- **Server**. Wave Server from which the recording was archived.
- **Mailbox**. User's mailbox folder from which the recording was archived. If you restore the recording, it will be returned to this mailbox.
- **From**. Name of the person who placed the call. On incoming calls, "Unknown" is displayed unless the user identified the caller as a contact. On outgoing calls, this column contains the user's name.
- **Received**. Date and time when a voice message was left, or a call recorded.
- **Length**. Length of the recording in minutes:seconds format.

- **Number**. On incoming calls, the extension, Caller ID name and number (if available), or external number that was dialed. On outgoing calls, the extension or external number that was dialed.
- **Created**. Date and time when the mailbox recording was archived.
- **Custom Data**. Custom data, if any, associated with the call.
- **Notes**. Starting text of any notes added to a voice message or call recording via the Call Monitor or Call Log. The complete notes appear in the Call Notes pane at the bottom of the Browser. For a call recording, Wave automatically adds information about the stations and/or trunks involved in the call.
- If you make changes to Call Notes via the Archived Recording Browser, those changes are included if you restore the recording to its original Inbox or other folder, but the Call Log notes remain unchanged.
- **Archive Notes**. Notes added to the archived recording via the Archived Recording Browser. Archive notes are maintained only in the archive, and are not included if the recording is restored to its original Inbox or other folder.

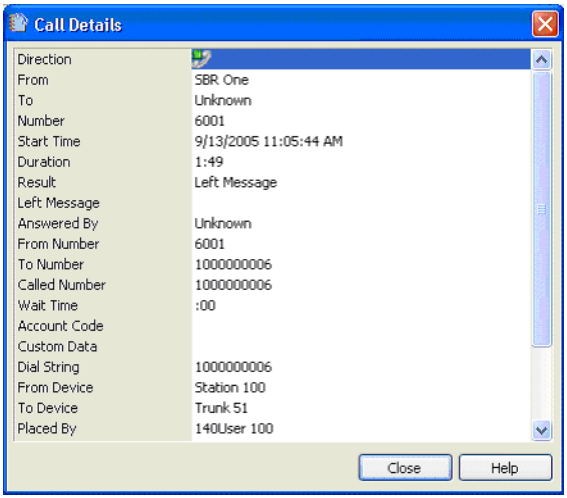
Acting on archived call recordings

To act on archived recordings:

1. Adjust the display in any of the following ways:
   - Click on any column heading to sort the search results on that column. You can type characters or words to jump to the first matching record in the sorted column that begins with that text.
   - Enter a number in the Recordings text box at the top right of the Browser and press **Enter** to go to that entry in the list. Use the buttons to browse through the search results.
   - To change the number of entries displayed per page, choose **Tools > Options**. In the Options dialog, enter the **Number of recordings to display per page**.

2. Click an archived file to select it. You can perform the following actions on a selected file:

   - **Play**. Double-click any column except the first column to play the recording, or use the audio controls at the bottom of the Browser.
   - **Bookmark**. To set a bookmark while listening to a recording, click and drag the orange triangle under the progress indicator at the bottom of the Browser. The next time that you play the recording, playback will start at the bookmark location.
   - **Open Call Log Details**. Click on the toolbar to view details about the Call Log entry associated with the mailbox recording.



Note: You can view Call Log details for all call recordings, and for voice messages that were left by a caller via the Wave phone commands. Internal voice messages will only have associated Call Log details if internal (station-to-station) call logging is turned on via **Tools > System Settings >** Call Log tab in the TV Admin applet in the Wave Remote Management Console. Voice messages sent directly to a user's voice mailbox by another user via ViewPoint do not have any associated Call Log details.

   - **Flag recording**. Double-click the first column for a recording to flag the selected recording for follow up. Double-click it again to remove the flag. (You can also use the **Flag this recording for follow-up** checkbox for the selected recording.)

- **Add notes**. To add new notes or edit existing notes to the selected recording, type in the **Call Notes** or **Archive Notes** panes.
- **Restore recording**. Click on the toolbar to move the selected recording back to the mailbox from which it was archived. It also stays in the archive until purged.
- **Export recording**. Click , one of the audio controls at the bottom of the Browser, to export one or more selected recordings to a location on a hard drive other than the folders from which they were archived. (Exported recordings are not deleted from the archive folder.)
- **Refresh**. Click on the toolbar to refresh the list of mailbox recordings displayed in the Browser.
- **Delete recording**. Click on the toolbar to delete one or more selected recordings from the archive folder. (To delete recordings based on criteria that you set, see "Purging archived recordings" on page A-14.)

Checking the archive for missing audio files

When you check the archive for missing audio files, all archive database entries that do not have a corresponding audio file in the archive folder are deleted from the database.

To check the archive for missing audio files

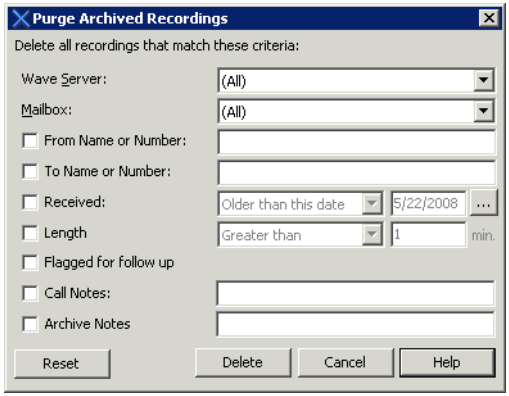
1. Choose **Tools > Check Archive**. **Note:** If this option is not available, ask your Wave system administrator to grant you Archive Admin privileges.
2. Click **OK** at the warning message to check the archive.

Purging archived recordings

You must have Administrator privileges to perform this operation. When you purge archived recordings, all mailbox recordings in the archive folder that match the criteria that you set are deleted permanently, as well as the corresponding archive database entries.

To purge archived recordings

1. Choose **Tools > Purge Recordings**. **Note:** If this option is not available, ask your Wave system administrator to grant you Archive Admin privileges. The Purge Archived Recordings dialog opens:



2. Specify the recordings that you want to delete from the archive. Selecting recordings to purge works the same as using the Basic tab to search for recordings. See “Search Criteria” on page A-5 for a description of each field.

3. Click **Delete** to purge mailbox recordings that match your criteria from the archive. Click **OK** at the warning message to confirm the purge.

Logging On with Command-Line Switches

APPENDIX CONTENTS

About ViewPoint command-line switches B-1
ViewPoint command-line switch reference B-1

About ViewPoint command-line switches

You can add various switches to the command line that ViewPoint shortcut uses to start ViewPoint. To change the command line, right-click ViewPoint shortcut icon, choose **Properties**, and then click the Shortcut tab. The **Target** field shows the command line.

Add switches to the end of the command line (after the closed-quote mark) with a space before the switch. You can add multiple switches separated by spaces. For example:

```
"C:\Program Files\Vertical Wave\ViewPoint\Vertical.Wave.ViewPoint.exe"
/Server:Wave /station:77
```

ViewPoint command-line switch reference

The following ViewPoint command-line switches are supported:

- **/allowmultiple**. Enables you to run multiple instances of ViewPoint at the same time on your computer.
- **/language.** Changes the ViewPoint interface language to any installed language. (A list of installed languages appears in the **Language** drop-down in the ViewPoint Log On dialog. See page 2-11). Specify one of the *language directory names* found in your C:\Program Files\Vertical Wave\ViewPoint directory.

  Syntax:

  ```
  /language:<language directory name>
  ```

Example:

The four languages installed with ViewPoint 1.5 are **de** (Deutsch), **es** (Espanol), **fr** (Francais), and **fr-ca** (Francais - Canada). You would use `/language:de` to start ViewPoint with a German (Deutsch) language interface.

- **/Server**. Runs ViewPoint against a specific Wave Server on your network. This is useful when you want to have one ViewPoint session using a Wave Server other than the one your ViewPoint runs against by default.

  Syntax:

  `/server:<servername>`

  Example:

  `/server:Wave`

- **/user /password**. Use to automatically log on to ViewPoint as a specific user. With both `/user` and `/password` present, ViewPoint skips the Logon dialog. (The two switches can also be used separately.)

  Syntax:

  `/user:<username> /password:<password>`

  Example:

  `/user:Neil Pratt /password:2112.`

- **/station**. Associates ViewPoint with a specific phone. See “Associating ViewPoint with a specific phone” on page B-3” for the syntax and more about how to use this command.

Associating ViewPoint with a specific phone

You can use the `/station` switch to set up various ViewPoint shortcuts for different phones so that you can quickly change the phone associated with ViewPoint. (Otherwise, to change the phone associated with ViewPoint you have to wait for ViewPoint to launch, choose **File > Use a different station**, and wait for ViewPoint to launch again.

`Syntax:`

/station:<*station number*/*default station*>

- For <*`station number`*>, specify a station ID, for example `/station:77`.
- For <*default station*>, enter either of the following: `/station:default` ; `/station:-1`.

Reporting Problems

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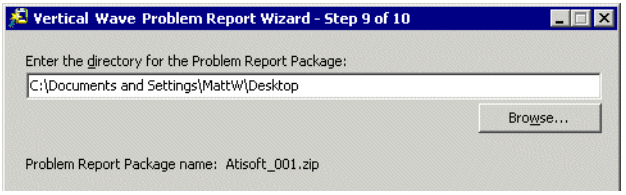
About the Problem Report Wizard C-1
Reporting a problem that involves a specific call. C-2
Reporting a problem that does not involve a specific call C-3

About the Problem Report Wizard

If you experience a problem with one of the Wave workstation applications—ViewPoint, the Contact Center Reporter, the Contact Manager Assistant, the TAPI Service Provider, or the Archived Recording Browser—report the problem to your Wave system administrator by using the Problem Report Wizard. The Problem Report Wizard is a tool that collects appropriate log files and prompts you for information that can help solve the problem.

The Problem Report Wizard creates a problem report package as a ZIP file in the location of your choice. You can then send the ZIP file to your Wave system administrator.

To prevent ZIP files from being overwritten, the Wizard gives each problem report package a unique name based on your company name and a unique sequence number, as shown in the following example.



The Wizard increments the sequence number in the file name each time it creates a new problem report package.

Reporting a problem that involves a specific call

If you encountered a problem that involved a call, there are two ways to report it:

To report a problem via an active call in the Call Monitor

1. Select the problem call in the Call Monitor.
2. Choose **Actions > Report a Problem**. The Problem Report Wizard opens with details about the call already entered.
3. Complete the Problem Report Wizard screens.

To report a problem via a call record in the Call Log

1. In ViewPoint, go to the Call Log folder and select the call during which the problem occurred.
2. Choose **Actions > Report a Problem**. The Problem Report Wizard opens with details about the call already entered.
3. Complete the Problem Report Wizard screens.

Note: The **Flag a Problem** button in the Call Monitor toolbar lets you click once to flag a problem call, for example, a call that is not displayed correctly in the Call Monitor, or a call in ViewPoint that doesn't match the call on your phone. Any time after flagging calls, you can run the Problem Report Wizard once and gather the logs for all of the flagged calls. See "Flagging a problem call to report later" on page 5-17.

Reporting a problem that does not involve a specific call

If your problem does not involve a specific call, run the Problem Report Wizard as follows:

1. Do one of the following:
   - From ViewPoint, choose **Help > Report a Problem**.
   - Run the file `C:\Program Files\Common Files\Vertical\Wave\TVPRWizard.exe`.
2. Answer the questions presented in each Wizard window.
3. Optionally, check **Send Problem Report Package via e-mail** in the final window to e-mail the problem report package to your Wave system administrator. It can be helpful to include in your e-mail the time at which the problem occurred, as closely as you can identify it.

Note: Because a problem report package can be large, after you send it to your Wave system administrator, you should delete it from your system to regain disk space.

Troubleshooting ViewPoint Problems

This appendix contains information that may be helpful when you are troubleshooting a problem that occurs when starting or using ViewPoint.

Firewall problems may prevent ViewPoint from starting.

Symptom: After installing ViewPoint successfully on a PC, the following message is displayed and ViewPoint fails to start:

> "Wave Server is unable to connect to ViewPoint, which could be due to a configuration issue on the Wave Server. Please contact your administrator so the can check if the Wave Global Administrator's Workstation Firewall settings allow connections from nnn.nnn.nnn.nnn"
>
> where "nnn.nnn.nnn.nnn" is the IP address of the Wave Server.

This problem may occur if your company network is defined as a "public network" on the PC's network settings and there is a firewall between the PC and the Wave Server. Additionally, internet security programs such as McAfee may prevent the connection.

Solution: Define the network to the Wave system as a "work network" instead of a "public network" to eliminate the firewall between the PC and the Wave Server or allow access by the Wave Server through the PC's firewall.

On a system configured with a locale of "Spanish (Spain)", a long distance prefix may be incorrectly added before dialing a long distance number via ViewPoint.

Symptom: A "0" prefix may be incorrectly added before dialing a long distance number via ViewPoint, even though long distance prefixes are not used in Spain.

This problem has been fixed on new systems as of Wave ISM 1.5 SP3. However, if a system was previously configured to use the "Spanish (Spain)" locale it is possible that ViewPoint may still incorrectly add a "0" before dialing a long distance number.

Solution:

1. Start the General Settings applet.
2. On the System tab, click **Apply**. (The **Apply** button will be enabled even though you have not yet made any changes.)
3. Click **Done**.

COM Exception when logging into ViewPoint.

Symptom: After a user clicks **OK** in the ViewPoint Log On dialog, the following error occurs:

> [03/12/2008 10:22:39.900 - 3][ViewPoint - Except] System.Runtime.InteropServices.COMException (0x8007041D): Retrieving the COM class factory for component with CLSID {EFED4BC8-3AD3-4D22-8493-F4E91D0BA58A} failed due to the following error: 8007041d.

Solution:

1. From a command prompt, change directory (cd) to the following:

   ```
   C:\Program Files\Common Files\Vertical\Wave
   ```

2. Run the following program:

   ```
   tvwkssvc.exe /service
   ```

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F12 (redial your last call), 6-9
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