



## VistaPoint Companion Users Guide

For VistaPoint Console Companion and VistaPoint Desktop Companion

### Getting Started

[Overview of the Main Window](#)

[Making Calls](#)

[Answering Calls](#)

[Conference Calls](#)

[Holding Calls](#)

[Transferring Calls](#)

[Overview of Working with Extensions](#)

[Keyboard Shortcuts](#)

## The Two Versions

VistaPoint Companion is a client program used within the VistaPoint Enterprise system. VistaPoint Companion is available in two versions:

- ε **VistaPoint Console Companion** - Designed for operators in low to high call volume environments. Allows operators to view and control calls on all extensions in the system.
- ε **VistaPoint Desktop Companion** - Designed for office workers who need a graphical interface into their telephones and its network. Allows control of one extension only.

The windows and commands in both versions are similar. The Console Companion version is described as the default in this document. Where it differs from the Desktop Companion version, this is pointed out.

**Note:** *Other VistaPoint Enterprise clients are available as plug-ins to Microsoft Outlook and MS CRM. These allow you to view and manage calls within Outlook. For more information, see the "VistaPoint Companion Users Guide for VistaPoint Companion for Outlook and VistaPoint Companion for MS CRM."*

### ABOUT DESKTOP COMPANION

The following are not available in the Desktop Companion version:

- ε There is no "Console" menu.
- ε There is no "Page" option.
- ε You may not disconnect another member of a conference.
- ε The Caller ID is displayed for your own extension only.
- ε You may not set the Status Note for an extension other than your own.

**Note:** *VistaPoint Companion requires a minimum 1024 x 768 screen resolution, with a 16-bit color palette.*

## Conventions Used in this Manual

"Click" means single-click with the main mouse button (normally the left button) while positioning the mouse cursor over the item in question. For example, "click the Answer button" means single-click with the left mouse button while placing the mouse cursor over the Answer button.

The ">" character is used to denote menu paths. For example, "choose Calls > Make Call" means go to the Calls menu and choose the Make Call command.

## Keyboard Shortcuts

Key	Function	Key	Function
F1	Open online help	Ctrl + A	Select all
F2	Hang up call	Ctrl + B	Barge
F3	Make call	Ctrl + C	Copy
F4	Answer call	Ctrl + D	Toggle "do not disturb"
F5	Create conference call	Ctrl + F	Find
F6	Start call transfer	Ctrl + I	Send instant message
F7	Cancel transfer	Ctrl + L	Recent Call Log
F8	Send to voicemail	Ctrl + M	Add comment to call
F9	Hold call	Ctrl + R	Toggle "forward calls"
F10	Unhold call	Ctrl + T	Change Status Note
Ctrl + F9	Park call	Ctrl + T	Time and date stamp (within a Status Note)
Ctrl + F10	Unpark call	Ctrl + V	Paste
F11	Page call	Ctrl + X	Cut
F12	Clear call	Ctrl + Y	Redo
Ctrl + F4	Call pickup	Ctrl + Z	Undo
Esc	Cancel mouse drag	Ctrl + Shift + D	Change another's DND*
Up arrow	Select next item up	Ctrl + Shift + R	Change another's forwarding*
Down arrow	Select next item down	Ctrl + Shift + T	Change another's Status Note.
Tab	Move focus to next	/ (on keypad)	Move focus to Call List
+ (on keypad)	Answer call	- (on keypad)	Transfer
* (on keypad)	Hold	. (on keypad)	Send to voicemail

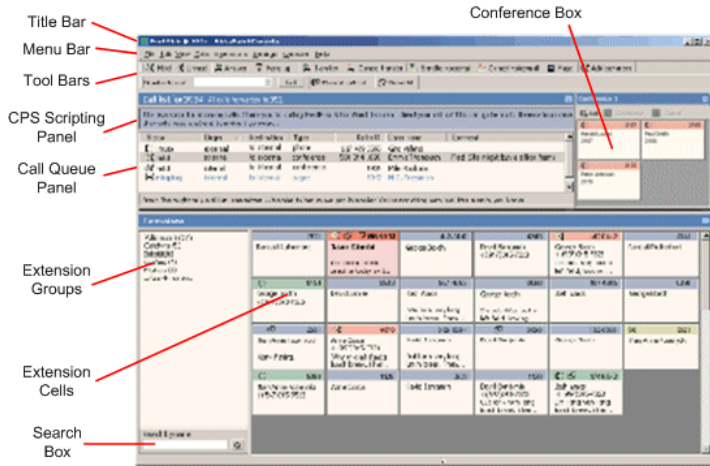
In the table above, \* means "Console Companion only."

Standard Microsoft keyboard commands can also be used, in conjunction with the commands above, to process calls in Console Companion and Desktop Companion.

Some commands and keyboard shortcuts may not always be available, depending on the state of calls and depending on how your system is configured.



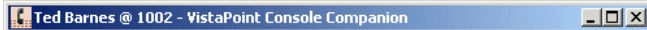
## Overview of the Main Window



- [The Main Title Bar](#)
- [Menus](#)
- [Tool Bars](#)
- [Call List Panel](#)
- [Conference Box Panel](#)
- [Extension Groups](#)
- [Extension Status Area](#)
- [Extension Search Box](#)

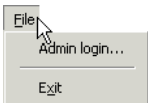
## The Main Title Bar

The Title Bar is the topmost part of the Main Window. The Title Bar displays your name and extension when you are logged in. To modify this information, see [My Extension Options](#).



## Menus

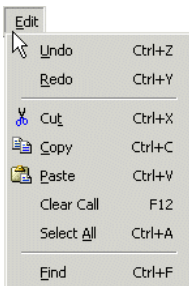
### File Menu



The following commands are available in this menu:

- Admin Login** - Displays the Administrative Login dialog box. Some commands are not available unless you are logged in as an administrator. See [Logging in as Administrator](#).
- Exit** - Shuts down the program.

### Edit Menu



The following commands are available in this menu:

**Undo** - Provides the ability to undo certain recent actions. The following actions may be undone:

- ↳ Resizing an Extension Cell
- ↳ "Cutting" an Extension Cell
- ↳ "Pasting" an Extension Cell

- ⌘ Changing the text in an Extension Cell or the Call Box
- ⌘ Updating a Status Note

**Redo** - Provides the ability to redo an action that was "undone." See Undo above.

**Cut** - Removes something and places it into memory. An item that has been Cut can be retrieved using the Paste command.

**Copy** - Places a copy of an item into memory. An item that has been Copied can be retrieved using the Paste command.

**Paste** - Retrieves an item that was placed in memory using the Cut or Copy commands.

**Clear Call** - On occasion due to network issues, the screen will show that you are still connected to a call after you have hung up. Use this Clear Call command to reset the screen.

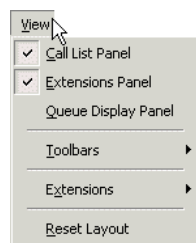
**Select All** - Used to select all of something. Depending on which area of the window has focus (is currently activated), the following may be selected:

- ⌘ Text, when in a text edit field.
- ⌘ Extensions, when the focus is on the Extension Status Area.
- ⌘ Extension Groups.

Since only one call may be selected at a time in the Call List, Select All is not available in the Call List.

**Find** - Causes the focus to jump to the Extension Search Box, so an Extension search may be done. See [Searching for an Extension](#).

## View Menu

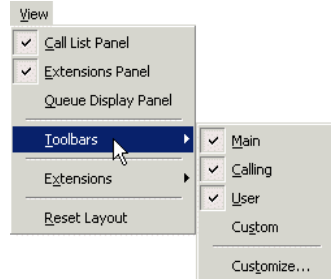


The following commands are available in this menu:

**Call List Panel** - Check this option to display the Call List Panel in the Main Window. (The scripting area is also displayed, if it is enabled.) This performs the same function as the "-" button on the Section Title area of the Call List.

**Extensions Panel** - Check this option to display the Extensions Panel (including the Extension Groups and the Search field).

**Queue Display Panel** - Check this option to display the Queue Display panel, which is used in call queuing. See [Call Queuing](#).



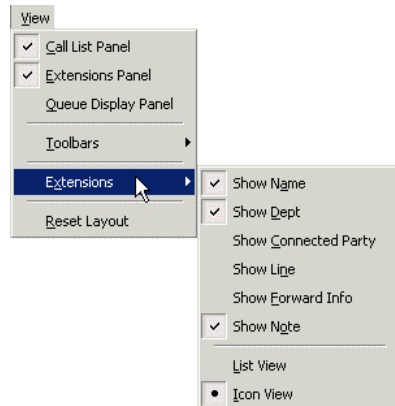
**Toolbars > Main** - Enable this option to display the Main toolbar, which contains all the call control buttons.

**Toolbars > Calling** - Enable this option to display the Calling toolbar, which contains the Number to Call field and the Call button.

**Toolbars > User** - Enable this option to display the User toolbar, which contains the Recent Call Log, Send IM, Page, and Add Comment buttons.

**Toolbars > Custom** - Enable this option to display the Custom toolbar, which contains any custom buttons that have been set up. See [Custom Toolbar](#).

**Toolbars > Customize** - Allows you to customize many aspects of the main window. See [Overview of Customization](#).



The following Extension settings apply only for the Extension Group that is currently selected.

**Extensions > Show Name** - Check this option to display extension names in Extension cells.

**Extensions > Show Dept** - Check this option to display department names in Extension cells. No department name will be shown if none has been set for this Extension.

**Extensions > Show Connected Party** - Check this option to display Caller ID in Extension cells for active calls (if Caller ID is available in your system). This option is available in the Console Companion version only.

**Extensions > Show Line** - Check this option to display which keyline is being used on a call. (This option is only available in Console Companion.)

**Extensions > Show Forward Info** - Displays forwarding information in Extension Cells. See [Configuring Call Forwarding](#).

**Extensions > List View** - If selected, the Extension Status Area will be presented in a detailed list view, similar to Windows Explorer. See [Extension Status Area](#).

**Extensions > Icon View** - If selected, extensions will be displayed as a rectangular grid of cells. This is the default setting. See [Extension Status Area](#).

**Reset Layout** - Restores the default layout of the main window, including the following: main window size and position, toolbar positions and visibility, and window "splitters" positions. The following are not reset: display of extensions and extension groups, and customization of the tool bars. To reset toolbar buttons, use the Reset All button, which is accessed by choosing View > Toolbars > Customize > Toolbars Tab.

## Calls Menu



The availability of the following commands depends on the state of the call that is currently selected in the Call List. The Call List does not need to be active to use these commands.

The following commands are available in this menu:

**Make Call** - Calls the number in the Call Box. For more information, see [Making Calls](#).

**Page** - Calls the paging number (configured in the Console menu) and performs a page. If you are currently connected to a call, the call is automatically placed on hold before paging is initiated. This button only appears if paging has been configured by your system administrator, and if you are using the Console Companion version. For more information, see [Paging](#).

**Send IM...** - Allows you to send an Instant Message to the selected Extension Cells. For more information, see [Overview of Instant Messaging](#).

**Answer** - Answers the call that is currently selected in the Call List. For more information, see [Answering Calls](#).

**Hang Up** - Disconnects the call that is currently selected in the Call List. For more information, see [Disconnecting a Call](#).

**Call Pickup** - Retrieves the call that is selected in the Call List. See [Call Pickup](#).

**Barge** - Allows you to connect to an extension when it is off-hook, even when it is connected to another call. See [Barging](#).

**Hold Call** - Places the call on hold that is currently selected in the Call List. For more information, see [Holding Calls](#).

**Unhold** - Takes the call off hold that is currently selected in the Call List. For more information, see [Holding Calls](#).

**Park** - Place a call where it may be retrieved by other extensions.

**Unpark** - Retrieve a parked call.

**Create Conference** - Places the currently selected call in the Call List into a new conference. For more information, see [Conference Calls](#).

**Add to Conference** - Adds the currently selected call in the Call List into a conference call. For more information, see [Conference Calls](#).

**Send to Voicemail** - Places the currently selected call in the Call List directly into the mailbox number that is entered in the Call Box. For more information, see [Sending to Voicemail](#).

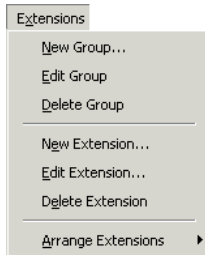
**Transfer Call** - Transfers the currently selected call in the Call List to the destination specified in the Call Box. This command is used for both supervised and blind transfers. For more information, see [Transferring Calls](#).

**Add Comment to Call...** - Adds a comment to the currently selected call in the Call List, so that when you transfer the call, the recipient of the call has background information about the call. See [Attaching a Comment](#).

**Cancel Transfer** - Cancels a transfer if you have started to transfer a call but have not yet hung up (which would complete the transfer). For more information, see [Transferring Calls](#).

**Recent Call Log** - Displays the last 64 calls (both inbound and outbound) on your extension. Calls that are unanswered or not completed are also included. Double-clicking an entry in the Recent Call List will dial that number. For more information, see [Making a Call Using the Recent Call Log](#).

## Extensions Menu



The following commands are available in this menu:

**New Group** - Displays a dialog box that allows you to create a new Extension Group. This custom group is only visible on your computer. For more information, see [Creating Personal Extension Groups](#).

**Edit Group** - Allows you to change extension group settings.

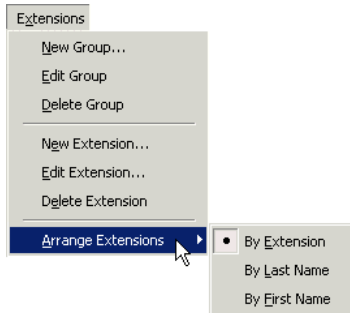
**Delete Group** - Deletes the currently-selected group in the Extensions Group List. Only groups that you have created or Search Results groups may be deleted this way. See [Deleting Personal Extension Groups](#).

**New Extension** - Displays a dialog box that allows you to create a new extension in the selected Extension Group. You may create a new extension only in an Extension Group you have created. For more information, see [Creating Personal Extension Cells](#).

**Edit Extension** - Allows you to edit or modify a particular Extension. You may only edit Extensions in Extension Groups you have created yourself, not in system-wide Extension Groups.

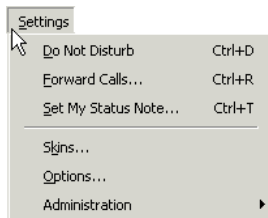
**Delete Extension** - Deletes an extension. You may only delete extensions in Extension Groups you have created yourself, not in system-wide Extension Groups.

**Arrange Extensions** - Allows you to sort extensions by extension number, last name, or first name. Only the currently-displayed Extension Group is sorted.



Options for Arranging Extensions

## Settings Menu



The following commands are available in this menu:

**Do Not Disturb** - Check this option to put your extension into Do Not Disturb mode. When Do Not Disturb is set, all calls will be forwarded. See [Configuring Do Not Disturb](#) for more information. This command is only available if your phone system supports this feature.

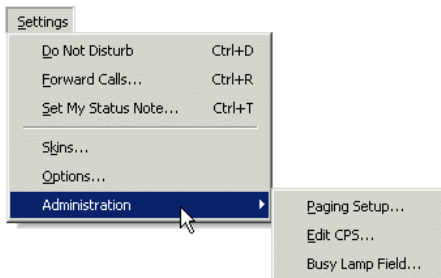
**Forward Calls...** - Allows you to set a destination for forwarded calls. This command is only available if your phone system supports this feature. When forwarding is set, an indicator is shown on title bar of the Call List. See [Configuring Call Forwarding](#).

**Set My Status Note...** - Allows you to set a Status Note. See [Setting a Status Note](#).

**Skins...** - Allows you to change the colors used in VistaPoint Companion. See [Changing Interface Colors](#).

**Options...** - See [Setting Options](#).

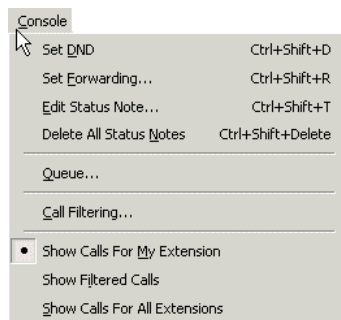
**Administration > Paging Setup...** - Allows you to configure the paging system. See your system administrator for help in setting up paging.



**Administration > Edit CPS...** - This command allows editing of the call processing script in use on your PC. This command should be used only by authorized administrators.

**Administration > Busy Lamp Field...** - This command allows you to create and administer extension (BLF) groups in the system. For more information, see the VistaPoint Enterprise Installation and Administration Guide.

## Console Menu



The Console menu appears only in the Console Companion version of VistaPoint. In addition, the commands in this menu will be available only if you are logged in as Administrator. See [Logging in as Administrator](#).

The following commands are available in the Console menu:

**Set DND** - Enable/disable the Do Not Disturb feature for the selected Extension Cell.

**Set Forwarding** - Enable/disable Call Forwarding for the selected Extension Cell. See [Configuring Call Forwarding](#).

**Edit Status Note** - Allows you to edit the Status Note for an extension. Select the Extension Cell and choose this command.

**Delete All Status Notes** - Deletes all status notes for all users in the VistaPoint Enterprise system.

**Queue** - Allows configuration for call queueing. See [Call Queueing](#).

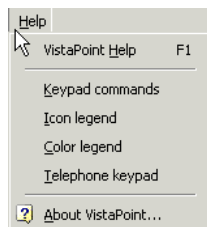
**Call Filtering** - Displays the Call Filtering dialog box, where you can set up specific filters of you displayed calls. See [Call Filtering](#).

**Show Calls for My Extension** - Set this to have only calls connected to your extension displayed in the Call List. See [Call Filtering](#).

**Show Filtered Calls** - Set this to have only calls that match certain criteria displayed in the Call List. See [Call Filtering](#).

**Show Calls for All Extensions** - Displays all calls being monitored by the VistaPoint Enterprise system. This also allows you to view and manipulate these calls. See [Call Filtering](#). USE THIS COMMAND WITH CAUTION. You can accidentally disconnect or re-route another user's call.

## Help Menu



The following commands are available in this menu:

**VistaPoint Help** - Displays online help. VistaPoint help can be navigated using the mouse or standard Microsoft keyboard commands.

**Keypad Commands** - Displays key commands and shortcuts.

**Icon Legend** - Displays a description of icons used in the program.

**Color Legend** - Displays the default colors and icons used for Extension cell states.

**Telephone Keypad** - Displays a numeric keypad. As you click on the buttons with the mouse, the numbers will be entered in the Call Box.

**About VistaPoint...** - Displays program information.

## Tool Bars

### Call Control Tool Bar

The following table shows toolbar buttons and their equivalent shortcut keys.

Button	Description
Answer	Answer the ringing call (F4). See <a href="#">Answering Calls</a> .
Hold	Put the call that is selected in the Call List on hold (F9). See <a href="#">Holding Calls</a> .
Unhold	Retrieve the call that is selected in the Call List (F10). See <a href="#">Holding Calls</a> .
Transfer	Transfer the selected call to the number in the Call Box (F6). See <a href="#">Transferring Calls</a> .
Cancel Transfer	Hang up on the destination party, and return to the original call (F7). See <a href="#">Transferring Calls</a> .
Hang up	End the call that is selected in the Call List (F2). See <a href="#">Disconnecting a Call</a> .
	Pickup a call that is ringing at another extension. See <a href="#">Call Pickup</a> .



Call pickup	
Send to voicemail	Send the selected call to voicemail for the extension in the Call Box (F8). See <a href="#">Sending to Voicemail</a> .
Create conference	Create a new conference with the call that is selected in the Call List. See <a href="#">Conference Calls</a> .
Park	Park a call. See <a href="#">Call Park</a> .
Unpark	Unpark a call. See <a href="#">Call Park</a> .
Barge	Connect to an extension when it is off-hook. See <a href="#">Barging</a> .

You can drag this toolbar and dock it vertically, rather than using it in the default horizontal position.

## Calling Tool Bar and Call Box

The following table shows the contents of the Calling Toolbar, and the equivalent shortcut keys.

Name	Button	Description
Call Box	Number to call <input type="text"/>	Enter a phone number, then click Call. When you click on an Extension Cell, its number is entered in this Call Box. See <a href="#">Making Calls</a> .
Call button	Call	Dials the number entered in the Call Box (F3). See <a href="#">Making Calls</a> .
Recent Call Log	Recent call log	View the list of recent incoming and outgoing calls (Ctrl+L). See <a href="#">Making a Call Using the Recent Call Log</a> .
Send IM	Send IM	Starts an instant message (Ctrl+I). See <a href="#">Overview of Instant Messaging</a> .
Page	Page	Call the overhead paging number to page someone (F11). See <a href="#">Paging</a> .
Add Comment	Add comment	Annotate a call (Ctrl+M). See <a href="#">Attaching a Comment</a> .
Filtered	Filtered	See <a href="#">Call Filtering</a> .
Not Filtered	Not Filtered	See <a href="#">Call Filtering</a> .

You can drag this toolbar and dock it vertically, rather than using it in the default horizontal position.

## Custom Toolbar

The Custom Toolbar (if it is displayed) contains any Smart Buttons that have been created by your system administrator.



Example of Smart Buttons in the Custom Toolbar

## Call List Panel

The Call List Panel contains a title bar, the scripting box (if enabled), the Call List, and a status bar.

**Note:** In earlier versions of Console Companion, the Call List was named the Call Queue. Do not be confused by this.

### Call List Title Bar

The Call List title bar is the topmost part of the Call List. This title bar contains a Minimize button that allows you to hide the Call List. This title bar will also display the mode of your extension, when your extension is set to Do Not Disturb or Call Forwarding modes.



The Call List Title Bar

## CPS Scripting Box

The CPS Scripting Box, when displayed, can show text messages that have been associated with a call by custom scripts. Scripts must have first been created on your system.

To display the CPS Scripting Box, go to Settings > Options > Display tab, and check the option "Show CPS scripting area."

Call List for 1002								
This is a call for iQ NetSolutions Inc Greeting: GM/GA, Welcome to iQ Sales								
Status	Origin	Destination	Type	Caller ID	Caller name	Timer	Comment	
offering	internal	internal		1004	Robin Wayne	00:02	//This is a ca	

Call List Panel with CPS box displayed

Call List for 1002								
Status	Origin	Destination	Type	Caller ID	Caller name	Timer	Comment	
offering	internal	internal		1004	Robin Wayne	00:02		

Call List Panel with CPS box not displayed

## Call List

The Call List shows a list of current calls and their status. You can select calls here and manipulate them. To work with a call, select it in the Call List. In many cases a call will remain selected in the Call List, even if the focus moves to another part of the Main Window.

Call List for 1002								
Status	Origin	Destination	Type	Caller ID	Caller name	Timer	Comment	
connected	internal	internal		1004	Rob Wayne	00:07		

Each call consists of two "legs," i.e. two persons (or devices) participating in the conversation. When you use Console Companion in the Not Filtered mode, you see both legs for all conversations. Each leg has an owner displayed in the "Internal Number" column and a remote party displayed in the "Caller ID" column. For external calls, (an external incoming call to your company, or someone from your company making an external outgoing call), you see one only leg. No leg is shown for the remote party, since VistaPoint does not monitor the remote party.

For more information about working with calls, see [Chapter 3 - Working with Calls](#).

### TIMERS IN THE CALL LIST

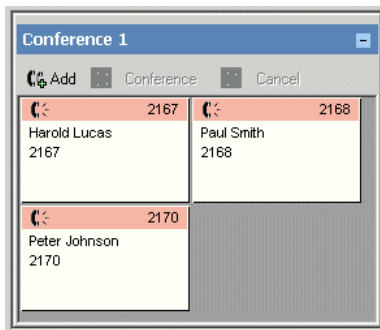
The Timer column indicates the duration of calls.

- The timer starts from zero when a call (either outgoing or incoming) begins ringing.
- When the call is answered, the timer starts again at zero.
- The timer resets to zero when you place a call on hold. When you take the call off hold, the timer starts again at zero.
- When you first switch to "Show Calls for All Extensions" mode, timers for all calls reset to zero, even for calls that are already in progress. New calls that begin after this point will start at zero and will increment normally. ("Show Calls for All Extensions" mode is only available in the Console Companion version.)

When a call at your extension is completed, the duration of the call is recorded in the Recent Call Log. The total duration of the call is recorded - the sum of the ringing, connected, and hold times.

## Conference Box Panel

The Conference Box is located to the right of the Call List. It shows the members of a conference call. For more information, see [Conference Calls](#).



### Call List Status Bar

This area displays the comment attached to the call, if there is one. See [Attaching a Comment](#).



## Extensions Panel

### Overview of Extensions

The Extensions Panel shows information about extensions (and phone trunks).



The Extensions Panel

Extension Groups are shown in the left part of the window.

In the Extension Status Area (the right part of the Extensions Panel), each extension is displayed as a cell.

The Extension Search Box is located in the bottom, left part of the window. It can be used to search for extension by the name of the extension owner.

For more information about using of the Extension Panel, see the sections that follow this one.

### Extensions Panel Title Bar

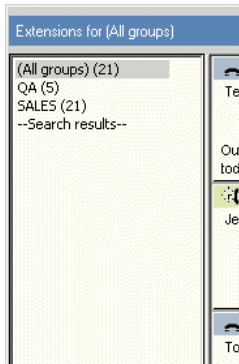
The Extensions Area title bar is located at the top of the Extensions Area. It contains a Minimize button that lets you hide the whole Extensions Panel. This title bar also indicates which Extension Group is currently being displayed in the Extension Status Area.



Extensions Panel Title Bar

### Extension Groups

The Extension Groups area shows the Extension Groups in the system. These groups are set up by the system administrator, and are visible to all users of the VistaPoint Enterprise system.



You can also create your own groups, which will only be visible on your computer. See [Creating Personal Extension Groups](#).

### Extension Status Area

The Extension Status Area shows the extensions (and phone trunks) that are being monitored by VistaPoint Enterprise. Extension Cells in the Extension Status Area show the extension number, the person the extension is assigned to, the status of the extension (busy, on hold, etc.), and whether the person is currently running VistaPoint Enterprise (and can therefore receive an Instant Message).

**Note:** If an extension has been set up to be monitored by VistaPoint but is now out of service, that extension cell will be gray.



Extension Status Area displayed in Icon View

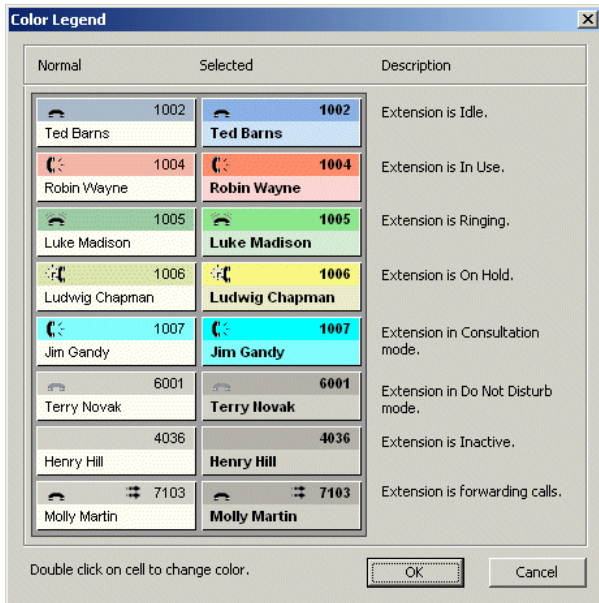
The Extension Status Area can also be displayed in List View.

	First name	Last name	Department	Extension	Caller ID	Caller name	Status note
	Ted	Barns		1002	1005	Luke Mad...	Out of office
	Tyler	Brooks		6015			
	Ludwig	Chapman		1006			
	Jim	Gandy		1007	6016	Greg Me...	
	Tony	Genova		6007			
	Spencer	Hopkins		6014			
	Drew	Johnson		6006			
	Tom	Lashinsky		6008			
	Sean	Lee		6013			
	Rob	Leidig		6005			
	Luke	Madison		1005	1002	Ted Barns	

Extension Status Area displayed in List View

### STATES OF EXTENSION CELLS

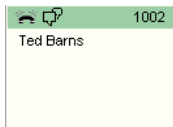
Extension cells change colors, depending on their state. A description of the states can be seen in the Color Legend window, which is accessed by choosing Help > Color Legend from the main menu.



Color Legend showing the Default color scheme

If you change the interface colors, this window will update to show your current settings. For information about changing colors, see [Changing Interface Colors](#).

**ICONS IN AN EXTENSION CELL**



Example: Icons for "Ringing" and "IM" in an Extension Cell

The following icons can appear in an Extension Cell, when your display is set to Icon View (this is the default view).

Icon	Description
	Idle
	In use
	Ringing
	Hold
	VistaPoint IM (user is logged in and available to receive a VistaPoint Instant Messages)
	Windows Messenger IM (user is logged in and available to receive a Windows Messenger Instant Messages)
	Call Forwarding is set for the extension.
	Status Note (extension has a Status Note attached)
(no icon)	The extension is not being monitored by VistaPoint Enterprise.

**Outbound and Inbound Call Icons**

In an Extension Cell (in the Console Companion version only), different icons represent inbound calls and outbound calls.



Inbound call (from 1004 to extension 6016)



Outbound call (from extension 6016 to 1005)

### Extension Search Box

The Extension Search Box is located in the lower left of the Extensions Panel, below the Extensions Group List. This search box is used to quickly find an extension. See [Searching for an Extension](#).

Search by name:

## Answering Calls

### To answer a call

**Step 1** When a call rings your extension, the call appears in the Call List and the call status shows as "offering." The incoming call is automatically selected.

Call List for 1002							
Status	Origin	Destination	Type	Caller ID	Caller name	Timer	Comment
offering	internal	internal		1004	Robin Wayne	00:05	

**Step 2** Click the Answer button. (You can also press F4, double-click on the call in the Call List, or right-click on the call in the Call List and choose Answer.)



### To answer a second call using the keyboard

If you are already connected to a call and a second call comes in, do the following to answer the second call:

**Step 1** Use the Up or Down arrows keys to move to the second call in the Call List.

**Step 2** Press F4 to answer the second call. The first call is automatically put on hold.

**Note:** You must have a multi-line extension to receive more than one call at a time.

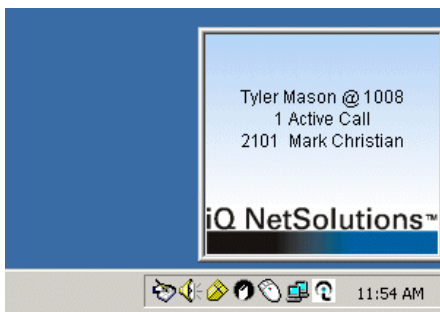
### To answer a second call using the mouse

**Step 1** Double-click on the first call in the Call List.

**Step 2** The first call is placed on hold and the second is answered.

### To answer a call when running in Tray Icon mode

**Step 1** If you are running in Tray Icon mode, when a call comes into your extension a notification popup window will appear.



Popup notification showing an offering call from extension 2101

**Step 2** Click once on the popup window to answer a call.

**Step 3** When you hang up, another notification popup will appear indicating that you are now disconnected.

**Note:** For more information on Tray Icon mode, see [Overview of Tray Icon Mode](#).

## Making Calls

### Making a Call

#### To make a call using the keyboard

**Step 1** Enter the number you want to dial in the Call Box, using the numeric keypad on your keyboard. When you begin entering numbers, they will appear in the Call Box. It is not necessary to click first in the Call Box before entering digits with the keypad.

Or you can simply click on the Extension Cell of the number you want to call. The number will be entered in the Call Box.

Number to call	1002	Call
----------------	------	------

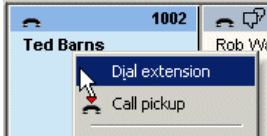
**Step 2** To make the call, click the Call button, which is located next to the Call Box. You can also click the Make Call button on the toolbar or press F3.



**Step 3** The call is initiated.

**To make a call using the mouse**

- Step 1** In the Extensions Panel, locate the Extension Cell for the person you want to call.
- Step 2** Right-click on the Extension Cell, and choose Dial Extension.



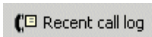
- Step 3** The call is initiated.

**Making a Call Using the Recent Call Log**

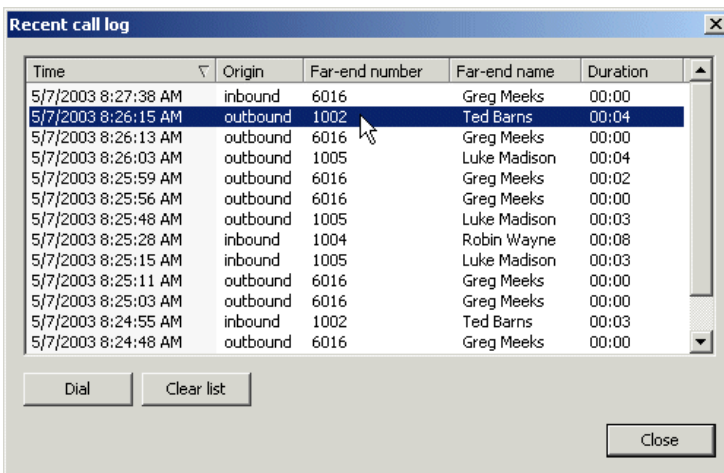
The Recent Call Log displays the most recent calls (both inbound and outbound) on your extension. Calls that are not answered or not completed are also included. Double-clicking an entry in the Recent Call List will dial the number shown in the Far-End Number column.

**To make a call using the Recent Call Log**

- Step 1** In the main toolbar, click the Recent Call Log button to open the Recent Call Log.



- Step 2** In the Recent Call Log, double-click an entry (or select the entry and click the Dial button). This puts the number in the Call Box in the main window, where you can edit the number if needed.



Recent Call Log



Call Box

- Step 3** To make the call, click the Call button (or press F3).



- Step 4** The number in the Call Box is dialed.

**Calling from MS Outlook**

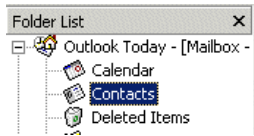
You can place calls from within your Contacts list in Microsoft Outlook.

**To call from within the MS Outlook Contacts list:**

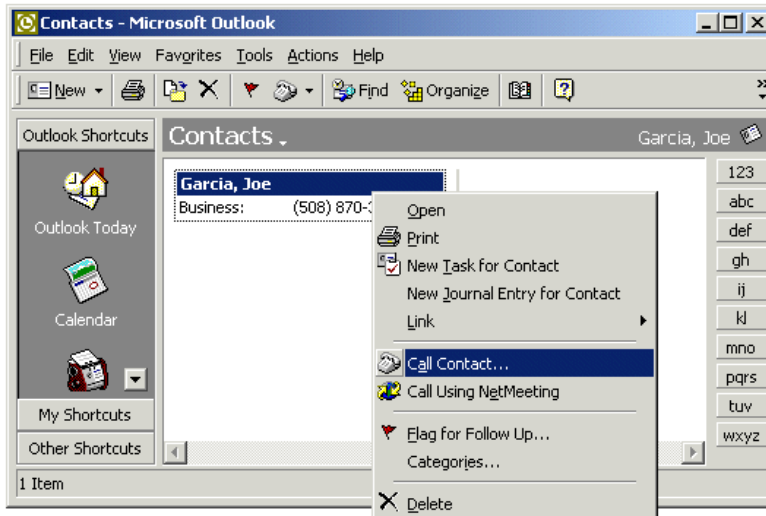
- Step 1** Launch Microsoft Outlook.
- Step 2** Click on Contacts in Microsoft Outlook.





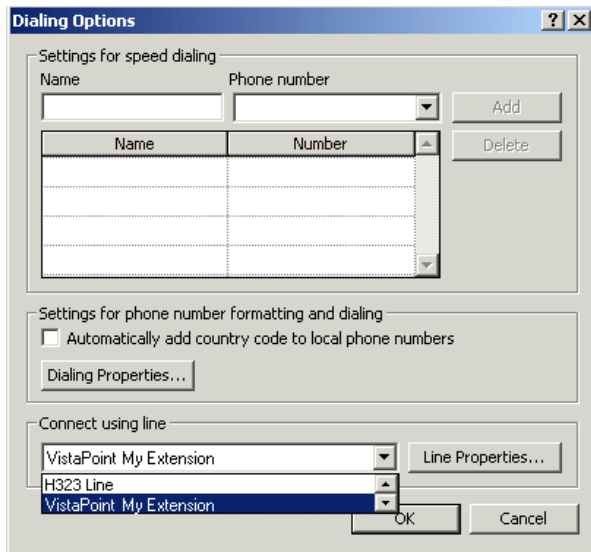


**Step 3** In the Contact list, right-click on the contact you wish to call.



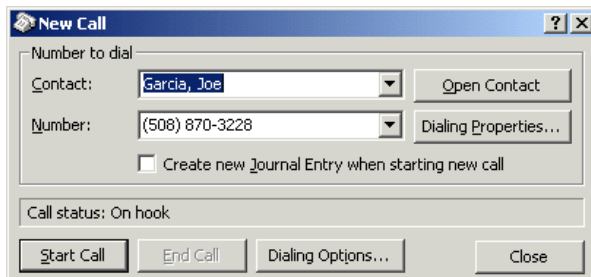
**Step 4** Select Call Contact... from the menu.

**Step 5** If it has not already been done by your system administrator, configure the Dialing Options. To do this, click the Dialing Options button. The Dialing Options dialog box will appear. In the area labeled Connect Using Line, scroll down to "VistaPoint My Extension." You may have to use the down arrow key to see this. Click OK.



**Step 6** You may also need to configure the Windows Dialing Properties for your computer. To do this, click the Dialing Properties... button. Set up the dialing properties as needed. Set the correct area code and dialing prefixes (such as 9 to dial out). See your system administrator if you need help.

**Step 7** Back in the New Call dialog box, click Start Call.

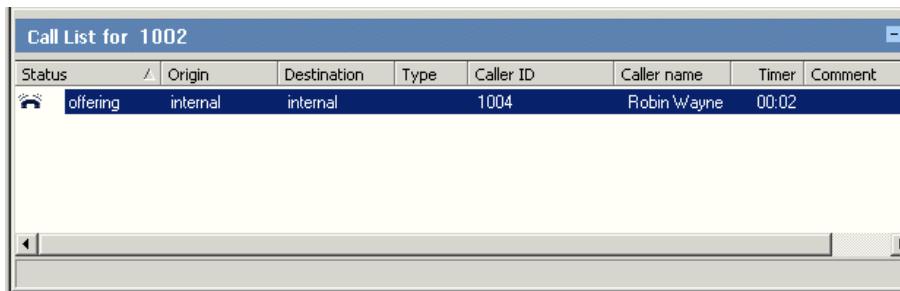


**Step 8** Your VistaPoint program will pop into focus and begin dialing. Then your extension will begin ringing. Pick up your telephone handset to complete the call.

## Disconnecting a Call

### To disconnect a call

**Step 1** In the Call List, select the call that you want to disconnect.



Status	Origin	Destination	Type	Caller ID	Caller name	Timer	Comment
offering	internal	internal		1004	Robin Wayne	00:02	

**Step 2** If the call is on hold, take it off hold (click Unhold or press F10).

**Step 3** Click the Hang Up button (or press F2, or right-click on the call and choose Hang Up).



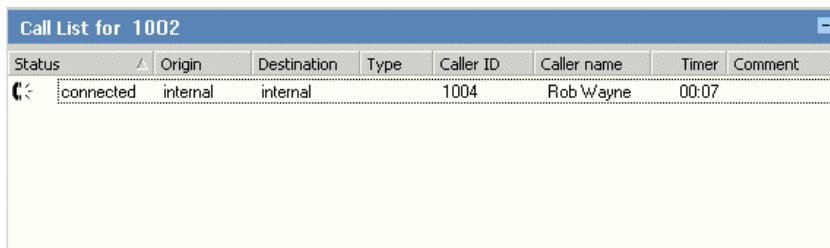
**Note:** If you are using an analog phone, you cannot use the Hang Up button.

**Note:** You cannot "hang up" a trunk in the Call List. If you are using Console Companion in unfiltered mode (enabled in Console > Show Calls for All Extensions) you may see trunk lines included in the Call List, if your administrator has configured your system to monitor trunks. Look for a name such as "Trunk1" in the Caller Name column (ask your administrator for the actual trunk names in your system).

## Holding Calls

### To place a call on hold

**Step 1** In the Call List, select the call you want to hold, if it is not already selected. To select a call, click on it or use the Up Arrow or Down Arrow key.



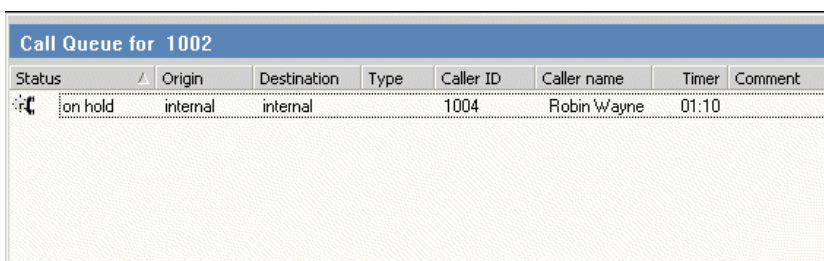
Status	Origin	Destination	Type	Caller ID	Caller name	Timer	Comment
connected	internal	internal		1004	Rob Wayne	00:07	

A connected call in the Call List

**Step 2** Click the Hold button, or press F9.



The call is put on hold.



Status	Origin	Destination	Type	Caller ID	Caller name	Timer	Comment
on hold	internal	internal		1004	Robin Wayne	01:10	

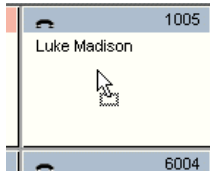
A call on hold in the Call List

To take the call off hold, click the Unhold button. (You can also double-click on the call in the Call List, click the Answer button, or press F10.)

## Transferring Calls

### To transfer a call to another extension using the mouse

- Step 1** Make sure the Extension you want to transfer to is visible in the Extension Status Area.
- Step 2** Drag the call from the Call List, and drop it onto the Extension Cell of the extension you want to transfer to.



Dragging and dropping a call to transfer it

**Note:** To cancel the transfer at this point (before the person answers), click the "Cancel Transfer" button.

- Step 3** If you would like to introduce the caller, remain on the line (this is a "supervised transfer"). If not, hang up now (this is a "blind transfer"). In either case, when you hang up the call is connected to the destination.

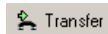
### To transfer a call to another extension using the keyboard

- Step 1** In the Call List, select the call you want to transfer, if it is not already selected. To select a call, use the Up Arrow or Down Arrow key.
- Step 2** In the Call Box, enter the number where you want to transfer the call. Type using the numeric keypad, and the number will be entered in the Call Box.



**Note:** If you mistakenly enter the wrong number in the Call Box, use the Backspace key to edit the number.

- Step 3** Click the Transfer button, or press F6. The call is placed on "Consultation" hold, and the destination extension is rung.



**Note:** To cancel the transfer at this point (before the person answers), press F7.

- Step 4** If you would like to introduce the caller, remain on the line (this is a "supervised transfer"). If not, hang up now (this is a "blind transfer"). In either case, when you hang up the call is connected to the destination.

## Conference Calls

### Creating a Conference

#### To create a conference call

- Step 1** If you are not already connected to the first person who will be in the conference, call that person now. Tell the person you will be putting them into a conference call.

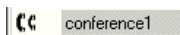
Call List for 3202					
Status	Origin	Destination	Type	Caller ID	Caller name
connected	internal			3201	Evan Marks

Connected to a call

- Step 2** Click the Create Conference button on the main toolbar. (You can also right click on the call in the Call List, and choose Create Conference Call.)



The person is added to the Conference Box, which is located to the right of the Call List. You are now in a conference call with this person.



Conference head

Call List for 3202							
Status	Origin	Destination	Type	Caller ID	Caller name	Timer	Comment
conference1				3202	George Joh...		

Conference 1	
Add	Conference
3201	Evan Marks
3202	George Johnston

In a conference call with one other person

**Note:** Click the Cancel button in the Conference Box to cancel a conference.

- Step 3** Add a second person to the conference:

Click on the person's extension in the Extension Status List. (You can also enter the number in the Call Box and then click the Add button in the Conference Box. For internal calls, you can also simply drag the person's Extension Cell into the Conference Box.)



The person's extension will now ring. The person's extension will appear in the Conference Box, but they are not yet connected into the conference call.

**Call List for 1002**

Status	Origin	Destination	Type	Caller ID	Caller name	Timer	Comment
conference1				3202	George Joh...		
offering	internal	internal	confe...	3202	George Joh...	00:02	

**Conference 1**

- Steve Jones 3200
- Evan Marks 3201
- George Johnston 3202

**Extensions for Show\_3300**

(All groups) (23) --Search results-- (0) Show_3300 (5)	<b>Steve Jones</b> 3200	Evan Marks 3201	George Johnston 3202	James Wong 3250	Paul Alexander 3251
--	-------------------------	-----------------	----------------------	-----------------	---------------------

Ringling a second person

**Step 4** When the person answers, tell the person you will be adding them into a conference call. Then click the Conference button in the Conference Box.



The person is added into the conference, along with you and the first person.

**Call List for 1002**

Status	Origin	Destination	Type	Caller ID	Caller name	Timer	Comment
conference1				3202	George Joh...		

**Conference 1**

- Steve Jones 3200
- Evan Marks 3201
- George Johnston 3202

**Extensions for Show\_3300**

(All groups) (23) --Search results-- (0) Show_3300 (5)	<b>Steve Jones</b> 3200	Evan Marks 3201	George Johnston 3202	James Wong 3250	Paul Alexander 3251
--	-------------------------	-----------------	----------------------	-----------------	---------------------

The second person added into the conference call

**Step 5** To see all the members in the conference, double-click the conference header in the Call List.

**Call List for 1002**

Status	Origin	Destination	Type	Caller ID	Caller name	Timer	Comment
conference1				3202	George Joh...		
conferenced	internal	internal	confe...	3201	Evan Marks	03:34	
conferenced	internal	internal	confe...	3200	Steve Jones	00:21	

**Step 6** To add additional people into the conference, repeat the previous steps using the Add and the Conference buttons.

**Note:** To reduce the height of the Extension Cells as shown in the Conference Box, right-click in an empty part of the box, choose View, and uncheck Show Dept. and Show Note.

**Note:** If you have a multi-line phone, the Conference Box may not accurately display the status of your calls. For example, if you are in a conference on a

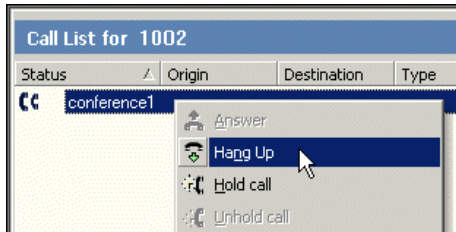
first line and also have a second line on hold, the Conference Box may incorrectly show your first line as being on hold.

**Note:** The Call List may not always show complete information about a member of a conference if the member's extension is not on the PBX where the conference was created. For example, if a member on a different PBX leaves the conference, that member may still display as connected. (This is due to a PBX limitation.)

## Ending a Conference Call

### To end a conference call

- Step 1** Right-click on the conference head in the Call List.
- Step 2** Choose Hang Up from the menu that appears. The conference is deleted.



## Stepping out of a Conference

You can temporarily step out of a conference, and then rejoin it later.

### To step out of a conference

- Step 1** Select the conference head in the Call List.
- Step 2** Click the Hold button, or press F9. You are now temporarily out of the conference.
- Step 3** To rejoin the conference, select the conference in the Call List and click the Unhold or Answer button, or press F10.

## Sending to Voicemail

### To send a call to voicemail

- Step 1** You must be connected to a call.
- Step 2** Make sure the call you will send to voicemail is selected in the Call List. To select a call, click on it or use the Up Arrow or Down Arrow key. If you just answered an incoming call it will already be selected automatically.
- Step 3** In the Call Box, enter the voicemail box number where you want to send the call. You can do this by clicking on the extension in the Extension Status Area, or by typing the number directly into the Call Box using the numeric keypad.

**Note:** If you mistakenly enter the wrong number in the Call Box, you can use the Backspace key to edit the number.

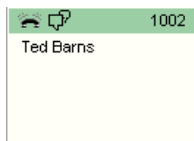
- Step 4** Click the Send to Voicemail button, or press F8. The call is immediately sent to voicemail. There is no need to hang up the call.

## Call Pickup

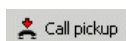
Call Pickup allows you to answer a call that is ringing on another extension. Besides being used on offering (ringing) calls, Call Pickup may also be performed on calls that are offered to extensions that are not monitored by VistaPoint Enterprise (extensions that do not have an Extension Cell). Call Pickup may not be available on your system, if your PBX does not support it.

### To perform Call Pickup

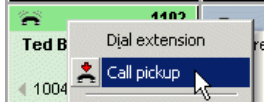
- Step 1** When you hear a call ringing at an extension other than your own, look for the Extension Cell for the number that is ringing.



- Step 2** Click on the Extension Cell. This will enter that extension's number into the Call Box. You can also enter the number directly in the Call Box using the keyboard.
- Step 3** Click the Call Pickup button, or press Ctrl+F4. You will be connected to the call.



Another way to pick up a call is to simply right-click on the extension that is ringing and choose Call Pickup.



**Note:** If you do not have a Call Pickup button, contact your system administrator. The Call Pickup feature must be turned on by your administrator.

**Note:** If Call Pickup is performed on a call that has a comment attached, the comment will be lost.

## Call Park

The Call Park feature in VistaPoint Enterprise allows you to put a call on hold and place it where it may be retrieved by another extension.

Call Park is available only with the Cisco CallManager and Avaya IP Office phone systems. Ask your system administrator if you are using one of these systems. The steps to park and unpark also differ depending on which of these two systems you are using.

### To park a call (within a Cisco CallManager phone system)

Calls may be parked in a "park zone," which is a range of numbers that have been set aside for this purpose. When you park a call it takes up a parking location in the system. You enter the number of the parking location to retrieve the parked call.

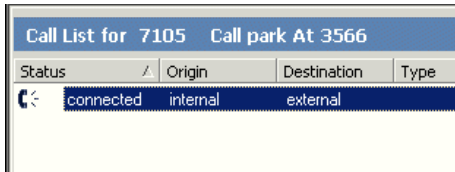
**Note:** This feature requires that at least one Park Zone has already been set up in the Cisco CallManager phone system.

**Step 1** You must first be connected to a call.

**Step 2** Click the Park button in the main tool bar. (You can also press Ctrl+F9, or choose Calls > Park from the main menu.)



The call will be parked in the next available parking location. The number where the call is parked will briefly display in the title bar of the Call List. If you are using Console Companion, the parked call will appear in the Call List.



*Example: The user of extension 7105 has parked a call on 3566*

### To park a call (within an Avaya IP Office phone system)

**Step 1** You must first be connected to a call.

**Step 2** Type a number in the Call Box. Any number may be used.

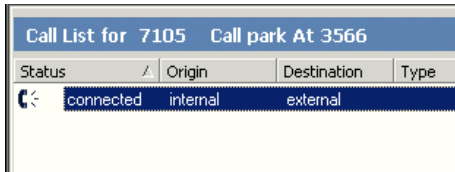


*The Call Box*

**Step 3** Click the Park button in the main tool bar. (You can also press Ctrl+F9, or choose Calls > Park from the main menu.)



The call will be parked, and the number where the call is parked will display briefly in the title bar of the Call List.



*Example: The user of extension 7105 has parked a call on 3566*

### To retrieve a parked call (within a Cisco CallManager phone system)

**Step 1** In the Call Box, enter the number where the call was parked.



*The Call Box*

**Step 2** Click the Unpark button in the main toolbar. (You can also press Ctrl+F10, or choose Calls > Unpark from the main menu.)



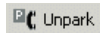
### To retrieve a parked call (within an Avaya IP Office phone system)

**Step 1** In the Call Box, enter the number where the call was parked.

Number to call

The Call Box

**Step 2** Click the Unpark button in the main tool bar. (You can also press Ctrl+F10, or choose Calls > Unpark from the main menu.)



## Call Queuing

The Call Queuing feature allows you to monitor special extensions called Call Queues. Calls that come into the queues can be answered by anyone who is logged into the queue. This feature works as a simple automatic call distribution (ACD) system. Call Queuing requires Console Companion. It is not available with all telephone systems.

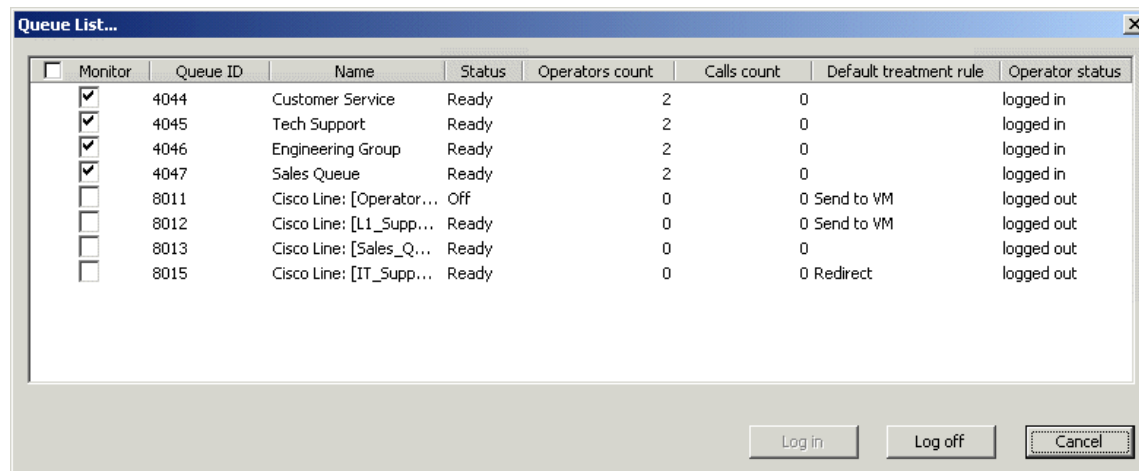
**Note:** In earlier versions of Console Companion, the Call List was named the Call Queue. Do not be confused by this.

## Logging into the Call Queue

### To log in to the Call Queue

**Step 1** Make sure Call Queuing is available in your system. Contact your system administrator for information.

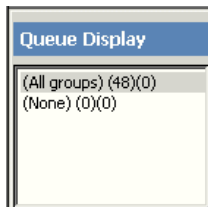
**Step 2** Log in to the Call Queues you need. In Console Companion, choose Console > Queue from the main menu bar. The Queue List dialog box appears.



Check the box next to each queue that you want this Console Companion to access, and then click the Log In button. You will be logged in and the Queue List dialog box will close.

**Important:** You must log in to the Call Queues each time Console Companion is started. If you do not log in, you will not be able to answer calls in the queues.

**Step 3** Make sure the Queue Display is showing. To do this, choose View > Queue Display.



The Queue Display shows all the Extension Groups that contain at least one queue. The All Groups shows all queues. All Groups and None always appear by default. Any other groups that appear have been set up by your system administrator.

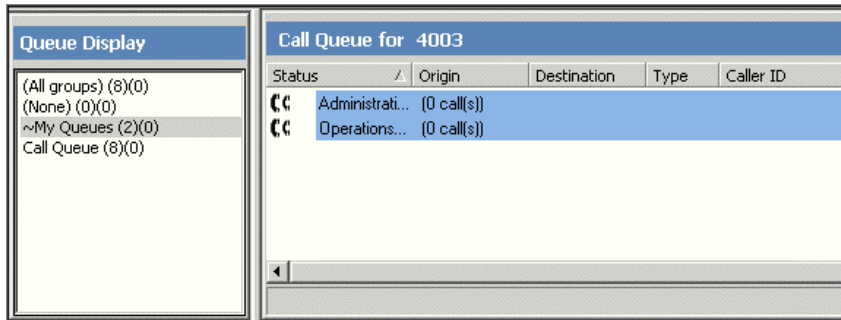
When you click on an Extension Group in the Queue Display, all the Call Queues in that group will be displayed in the Call List. If you want to see only the regular, non-queue calls in the Call List, click on the None group in the Queue Display.

## Answering Calls in the Call Queue

### To answer a call in the Call Queue

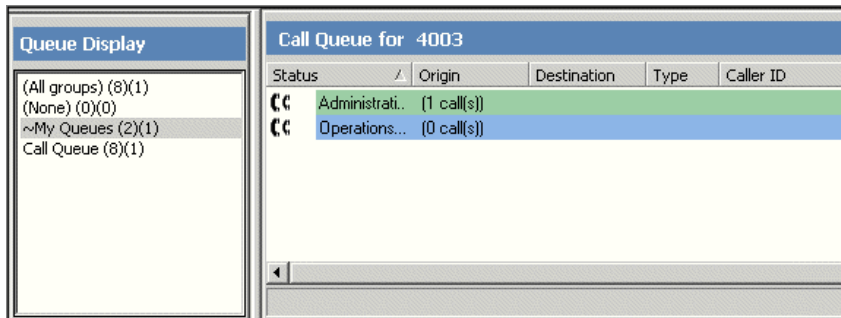
**Step 1** You must be logged in to the Call Queue before you will see calls in the queue. See [Logging into the Call Queue](#).

**Step 2** In the Queue Display panel, click on an Extension Group that includes the queues you want to monitor. The queues will display in the Call List.



Idle queues

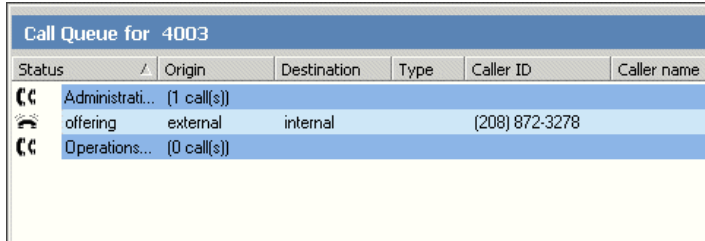
When a call comes into one of the queues, in the Call List you will see the number of calls increase (for example, from "0 Call(s)" to "1 Call(s)"). In addition, if the queue header is not already expanded in the Call List, the heading color will change green to indicate that a new call is in that queue.



Queue with incoming call

- Step 3** To Answer the call, click on the queue heading in the Call List, and press F4 or click the Answer button. Or double click on a group name in the Queue Display, or double click on a queue heading in the Call List. If there is more than one call in the queue, you will receive the oldest call in the queue. If you double-click on the group named "All groups" you will answer the oldest call in all the queues you are logged into.

If you want to answer a specific call, double-click on the queue heading in the Call List. This will display all the calls in the queue. Then click on the call you want, and press F4 or click the Answer button.



Queue header expanded to show individual call in queue

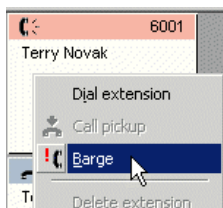
To transfer the call instead of answering it, select the individual call and press F6 (or click the Transfer button, or drag the call from the Call List and drop it on the destination Extension Cell.) This will perform a Blind Transfer.

## Barging

The Barge feature in Console Companion allows you to connect to an extension when it is off-hook, even when it is connected to another call.

### To connect to an extension that is off-hook

- Step 1** In the Extension Status Area, find the extension you want to connect to. The extension must be off-hook for Barge to work.
- Step 2** Right-click on the extension and choose Barge from the menu.



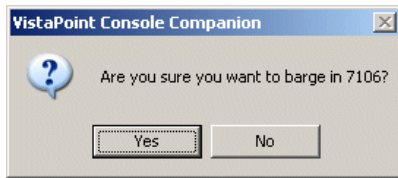
You can also select the call and then click the Barge button, or choose Calls > Barge, or press Ctrl+B. Or you can enter the number in the Call Box and choose Barge.





If you select an extension and the Barge button remains grayed out, then the extension is not in a state that permits barging.

**Step 3** Answer Yes in the message box that appears.



**Step 4** If the extension was connected to another call, a conference call is created that includes you and the original participants in the call. If the extension was off-hook but not connected to another call, you will be connected but no conference will be created. The target extension and any other parties connected to it will hear a ringing sound when the barge occurs.

You are now connected to the extension and may speak to the person at that extension.

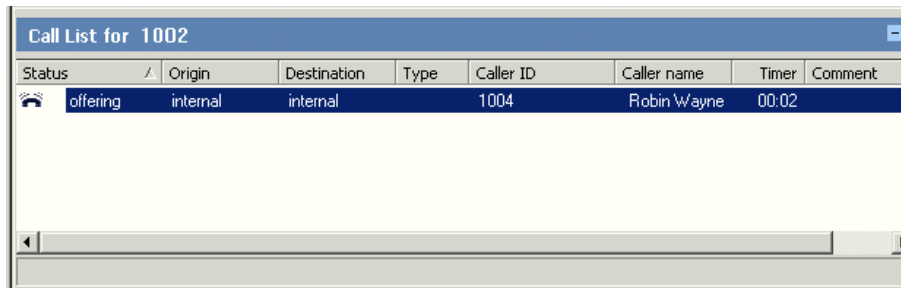
**Note:** The Barge feature is only available in Console Companion.

**Note:** Barge does not work for all PBX types. You can only barge on extensions that are on a PBX for which Barge is supported by VistaPoint.

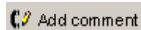
## Attaching a Comment

To add a comment to a call

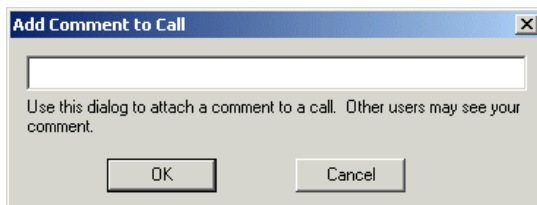
**Step 1** Select the call in the Call List. To select a call, click on it or use the Up Arrow or Down Arrow key.



**Step 2** Click the Add Comment button, or press Ctrl+M.

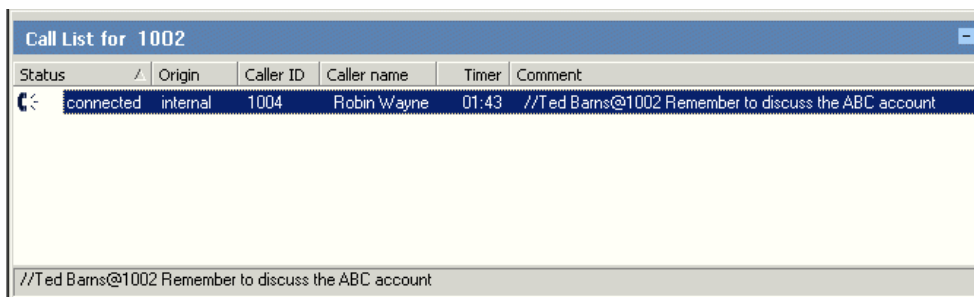


**Step 3** The Add Comment to Call dialog box comes up.



**Step 4** Enter the comment.

**Step 5** Click OK. The comment appears in the Call List, both in the Comment column and in the Status Bar.



**Note:** The Add Comment feature may not be available through your phone system.

**Note:** If a call is transferred to you and it already has a comment attached, do not attach another comment to the call.

## Call Filtering

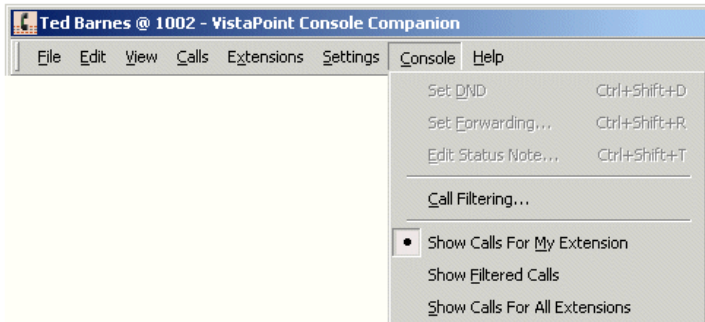
### Overview of Call Filtering

Console Companion allows you to set which types of calls will appear in your Call List. This is useful for when there are a lot of calls in the system. These call filtering options are not available in the Desktop Companion version.

Each call consists of two "legs," i.e. two persons (or devices) participating in the conversation. When you use Console Companion in the Show Calls for All Extensions mode, you see both legs for all conversations. For external calls, (an external incoming call to your company, or someone from your company making an external outgoing call), you see one only leg. No leg is shown for the remote party, since VistaPoint does not monitor the remote party.


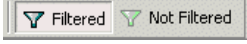

Call filtering options are accessed through the Console menu. The filter mode is also reflected in the Calling Toolbar (see [Calling Tool Bar and Call Box](#)).

### Call Filter Modes



The Call Filtering option in the Console menu opens the Call Filtering dialog box (see the next section, [Custom Call Filter Rules](#)).

The three filtering settings at the bottom of the Console menu are described in the table below.

Setting in Console Menu	Tool Bar Shows ...	What It Does
Show Calls for My Extension (the default setting)	Neither the "Filtered" button nor the "Not Filtered" button is pressed. 	The Call List displays only the calls that are connected to your extension. Calls that do not involve your extension are filtered out.
Show Filtered Calls	The "Filtered" button is pressed. 	Your custom filtering rules are used. The Call List displays only calls that meet the criteria set in the Call Filtering dialog box. See <a href="#">Custom Call Filter Rules</a> .
Show Calls for All Extensions	The "Not Filtered" button is pressed. 	No filtering at all is used. The Call List displays all calls throughout the system (all calls that are monitored by VistaPoint Enterprise). This also allows you to view and manipulate these calls.

**Warning:** Use the Show Calls for All Extensions setting with caution. You can accidentally disconnect or re-route another user's call.

The default setting in the Console menu is Show Calls for My Extension, which means neither of the filtering buttons are pressed down on the toolbar. In this default state, no special filtering is used. All calls connected to your extension will appear in your Call List. Other calls in the system in which your extension is not involved are not shown.

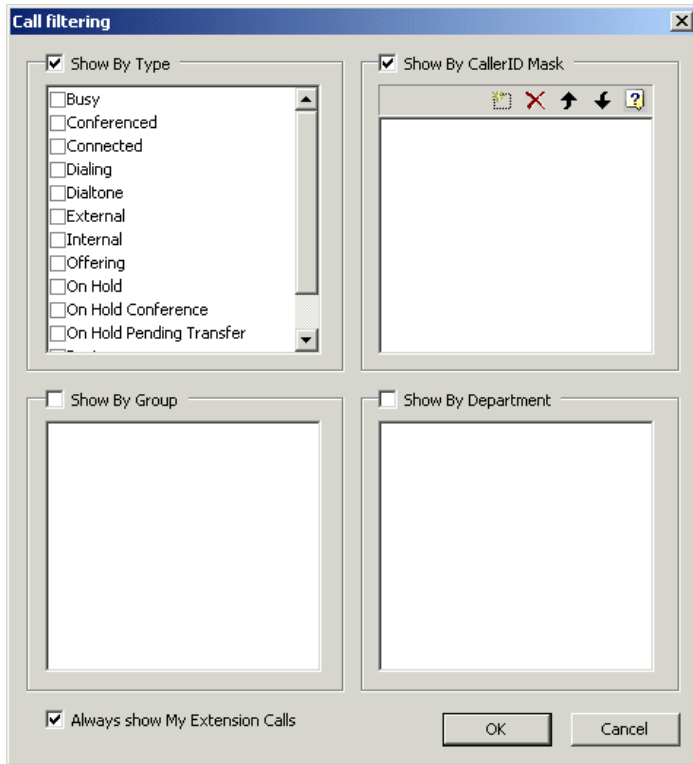
### Custom Call Filter Rules

When the Filtered button in the toolbar is in the "pressed down" state, the settings in the Call Filtering dialog box will be used to determine which calls appear in the Call List.



The filter buttons in the Calling Toolbar

To bring up the Call Filtering dialog box, choose Console > Call Filtering from the main menu.



The Call Filtering dialog box

### THE "ALWAYS SHOW MY EXTENSIONS CALLS" SETTING

The check box labeled "Always Show My Extension Calls" is located at the bottom of the Call Filtering dialog box. If you want to be able to see all the calls on your extension number, make sure this box is checked.

By default, "Always Show My Extension Calls" is checked and nothing else is checked. When the dialog box is in this default state, it is the same as if Show Calls for My Extensions were set in the Console menu-no special filtering is used.

### THE FOUR MAIN CATEGORIES FOR FILTERING

The Call Filtering dialog box contains four major categories: Show By Type, Show By Caller ID Mask, Show By Group, and Show By Department.

To enable the settings in a category, the main checkbox above that category must also be checked. For example, to show internal calls you would check the "Internal" checkbox, which is located in the "Show By Type" category. But you also must make sure that the main "Show By Type" checkbox is checked.

If none of the main categories is enabled, and "Always Show My Extension Calls" is also not checked, no calls will ever appear in the Call List while the Filtered button is pressed down. If you try to set this dialog box this way, you will get a message warning you that the current filter setting will hide all calls in your Call List.

### FILTERING SETTINGS ARE INCLUSIVE

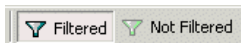
The call filtering criteria in the Call Filtering dialog box are inclusive. If a call matches any of the criteria specified in the this dialog box, then the call is shown in the Call List. In other words, the feature uses "OR logic"-if either this or that condition is met, then the call will be shown.

## Setting up Call Filtering

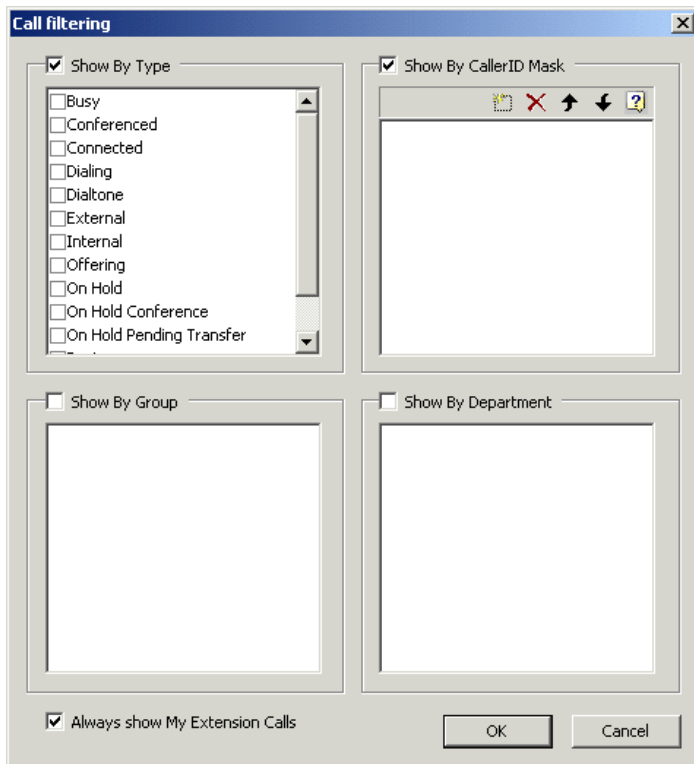
This section shows the steps to set specific call filtering criteria. (For more general information about Call Filtering, see the previous sections.)

### To use specific call filtering criteria

**Step 1** Go to the main toolbars, and click on the Filter button to set it to the "pressed down" state (or choose Console > Show Filtered Calls from the main menu).

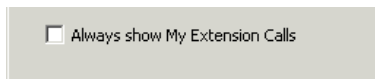


**Step 2** From the main menu, choose Console > Call Filtering. The Call Filtering Dialog box appears.



The Call Filtering dialog box

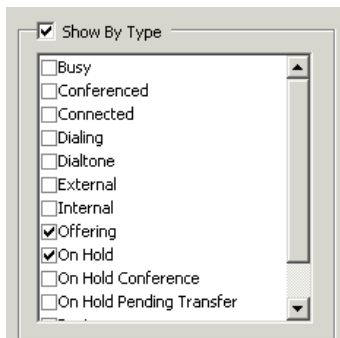
- Step 3** If you want to see all the calls on your extension, regardless of what other criteria may be set in the Call Filter dialog box, make sure the "Always Show My Extension Calls" check box is checked.



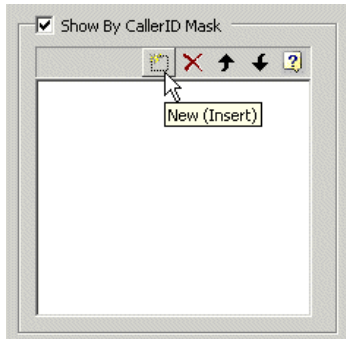
- Step 4** There are four main categories or areas in the Call Filtering dialog box. You can set criteria in one or more of the categories. Only one of the criteria needs to be met for a call to appear in the Call List.

Set one or more criteria in the four categories:

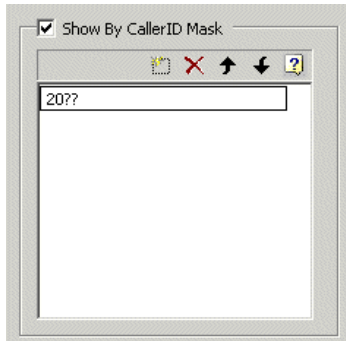
**Show By Type** - Check the main Show By Type checkbox. Then check one or more criteria. For example, to show only calls that are ringing or on hold, check "On Hold" and "Offering."



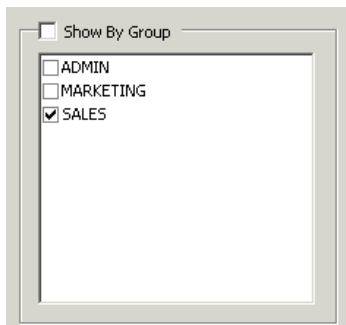
**Show By Caller ID Mask** - Check the main Show By Caller ID Mask checkbox. Then click the New button at the top of the category.



A new blank field will appear. Now enter the Caller ID pattern you want to match. Use question marks to indicate "wildcard" digits. For example, to show only calls that come from four-digit extensions and that begin with "20", you would enter "20??".



**Show By Group** - Check the Show By Group check box. Then check off one or more Extension Groups in the list. For example, to see only calls that involve extensions in the Extension Group named "Sales," you would check that check box.



**Show By Department** - Check the main Show By Department checkbox. Then check a department from the list. (The department entries come from the "Department (or Comment)" setting in Extension Cells. If no departments are listed in the Show By Department area, then nothing for this field is currently set in any Extension Cells.)

**Step 5** Click OK.

Call Filtering is now set on your extension. Now only those calls that match at least one of the filter criteria you have set will appear in your Call List.

If you ever need to go back to the un-filtered view, use the filter buttons on the tool bar. See [Call Filter Modes](#).

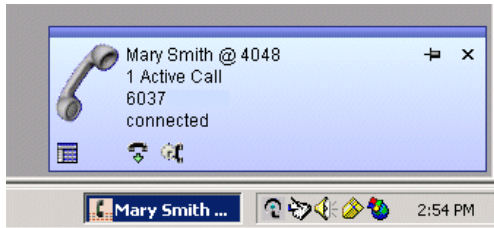
## Working with the Notification Window

### Overview of the Notification Window

The Notification Window provides a convenient way to do basic call control when you do not want to have the full VistaPoint Companion main window open.

#### INFORMATION DISPLAYED IN THE NOTIFICATION WINDOW

The Notification Window shows your name and extension information, as they are set in the Options for VistaPoint Companion.



Depending on the state of your extension and calls, icons and buttons will appear in the Notification Window to indicate the following: dial tone/off hook, voicemail, conferenced, ring-back, or busy. Call control buttons will appear that allow you to answer, hold, unhold, hang up, or cancel transfer. To find out what a button or icon does, hold the mouse cursor over it until the ToolTip appears.

Depending on the state of calls, other information may also be displayed, including the number of active calls, call state, and Caller ID.

## Displaying the Notification Window

### ENABLING THE NOTIFICATION WINDOW

The Notification Window feature is enabled by default. See [Enabling Tray Icon Mode](#) for information about enabling and disabling it.

### SHOWING THE NOTIFICATION WINDOW

If the Notification Window feature is enabled but the Notification Window is not currently displayed, you can show it by double-clicking the System Tray icon. Or you can right-click on the VistaPoint Companion icon in the Windows System Tray and choose Notification Window.

If the notification window is not enabled, double-clicking the tray icon will restore the application window.

### KEEPING THE NOTIFICATION WINDOW OPEN

You can "pin" the Notification Window to set it permanently in "always on top" mode. To do this click on the pin icon until it points down. The icon toggles between "pinned" and "unpinned" when you click on it repeatedly.



*Pinned Open*



*Unpinned*

## Controlling Calls Using the Notification Window

You can use buttons that appear in the Notification Window to control calls. If a function is available for the call state you are in, a button will appear for it, such as to hang up, hold the call, etc.

The buttons work the same way as the call control buttons in the main toolbar.

## Overview of Working with Extensions

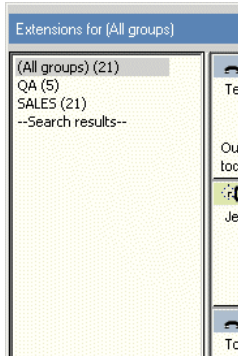
You work with extensions in the Extensions Panel. See Extensions Panel for a description of the parts of the Extensions Panel.



The Extensions Panel

## Creating Personal Extension Groups

The system administrator sets up system-wide (global) groups of Extensions. These system-wide Extension Groups automatically show up in the Extensions Group List, found in the Extensions Panel.



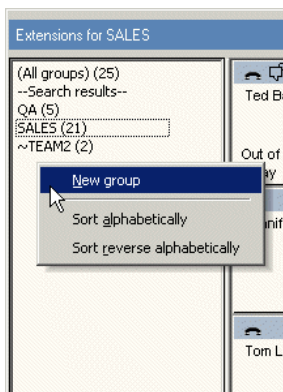
The Extension Groups List

You can also create your own personal Extension Groups, and then add Extension cells to them. The personal Extension Groups and Extension Cells that you create are visible on your computer only.

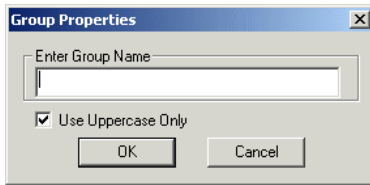
### To create a personal Extension Group

**Step 1** Right-click in the Extension Groups area.

**Step 2** Choose New Group from the menu that appears.



**Step 3** The Group Properties dialog box appears.



**Step 4** Enter a name for the new group, and click OK.

**Step 5** The new group appears in the Extension Groups area.

You can now add personal extensions to the group you created. See the next section for more information.

## Creating Personal Extension Cells

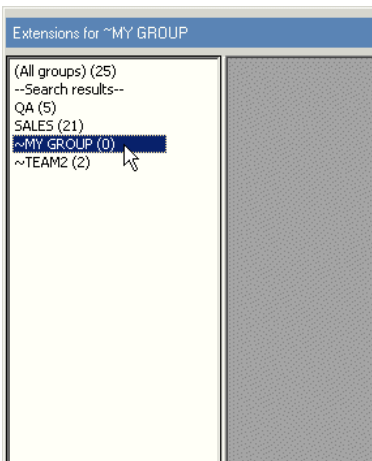
The Extension Cells that you create are visible on your computer only. You can create a new Extension Cell only in a personal Extension Group that you have created. (See [Creating Personal Extension Groups.](#))

You cannot create new Extension Cells in the Extension Groups that already existed when you opened VistaPoint Companion for the first time. These are system-wide Extension Groups that were set up by your system administrator.

The Extensions you create can also serve as speed dial buttons, since whenever you double-click on an Extension it is automatically dialed.

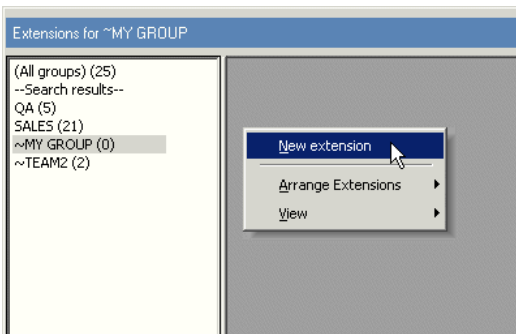
### To create a personal Extension Cell

**Step 1** In the Extension Groups area, click on the Extension Group where you want to add a new Extension Cell. This selects the Extension Group and displays any Extension Cells that are already in the group.



**Note:** You can create a new Extension Cell only in an Extension Group that you have created. See [Creating Personal Extension Groups.](#)

**Step 2** Right-click on the blank (gray) area in the Extensions area, and choose New Extension.



**Step 3** The Add Extension dialog box appears.



Fill in the Add Extension dialog box as follows:

**Extension #** - Enter a number for the new Extension, up to nine digits.

This does not need to be a valid extension number; however, it must be a number you have not already used in any other Extension Cell you have created.

**First Name** - Enter the first name, as you want it to be displayed in the Extension Cell.

**Last Name** - Enter the last name, as you want it to be displayed in the Extension Cell.

**Department (or a Comment)** - (Optional) Enter a department name, company name, or other information you want to display in this cell. This will be displayed in the cell below the first and last name. A maximum of 12 characters is allowed.

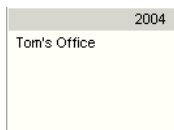
**Dialable Address** - Enter a valid telephone or extension number. Enter digits only (no characters, spaces, hyphens, or parentheses). For outside numbers include the digits required to dial out, such as "9" and "1" and an area code; for example "916175551212." (Your system may use a number other than 9.)

When you click this Extension Cell once, the number you enter here will be placed in the Call Box, and you can then click Make Call to call the number. When you double-click this Extension Cell, the number you enter for Dialable Address will be dialed automatically.

**Step 4** Click OK in the Add Extension dialog box. The new personal Extension Cell has now been added to your personal Extension Group.

## Creating Speed Dial Buttons

When you add an extension to a personal Extension Group you have created, this Extension Cell can function as a speed dial button. You can double-click on the cell to quickly call a pre-set number.



Example of a speed button

The numbers used for speed dial buttons can be either internal or external telephone numbers. Extension numbers used in speed dial buttons do not need to be monitored by VistaPoint Enterprise. In other words, you can create a speed dial button to dial an extension, even if the Extension does not appear in the system-wide All Groups extension group.

Speed dial extension cells are gray (unless you have changed the default color).

The steps to create a speed dial button are the same as the steps to create a new extension cell. See [Creating Personal Extension Cells](#).

## Deleting Personal Extension Cells

You can only delete personal Extensions that you have created. You cannot delete the system-wide Extensions set up by your system administrator.

### To delete a personal Extension

**Step 1** Click on the Extension Group that contains the Extension you want to delete.

**Step 2** Right-click on the Extension you want to delete, and choose Delete Extension.

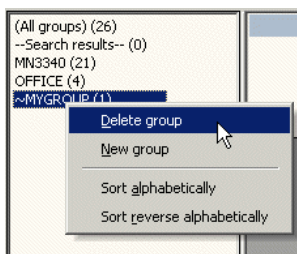
**Step 3** Answer Yes in the confirmation box that comes up.

## Deleting Personal Extension Groups

### To delete an Extension Group

**Step 1** Right-click on the group in the Extension Groups that you want to delete.

**Step 2** Choose "Delete Group."












**Step 3** Click Yes in the message box that appears, to confirm that you want to delete the group.












**Note:** You can only delete personal groups that you have created, not system-wide groups. You also cannot delete the group that results from a search.

## Changing Extension Views

Extensions can be displayed in either Icon View or List View. Icon View is the default.

 1002 Ted Barns	 1004 Robin Wayne	 1005 Luke Madison
 1007 Jim Gandy	 6002 Jennifer Vasquez	 6003 Sue Thomas
 6005 Rob Leidig	 6006 Drew Johnson	 6007 Tony Genova

Extension Status Area displayed in Icon View

	First name	Last name	Department	Extension	Caller ID	Caller name	Status note
	Ted	Barns		1002	1005	Luke Mad...	Out of office
	Tyler	Brooks		6015			
	Ludwig	Chapman		1006			
	Jim	Gandy		1007	6016	Greg Me...	
	Tony	Genova		6007			
	Spencer	Hopkins		6014			
	Drew	Johnson		6006			
	Tom	Lashinsky		6008			
	Sean	Lee		6013			
	Rob	Leidig		6005			
	Luke	Madison		1005	1002	Ted Barns	

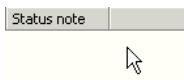
Extension Status Area displayed in List View

### To change extension views

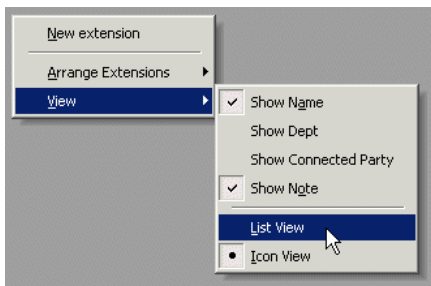
**Step 1** If starting in Icon View, right-click in an empty (gray) part of the Extension Status Area.



If starting in List View, right-click in the right-most part of the Extension Status Area, to the right of the Status Note column. Reduce the size of the Status Note column if needed.



**Step 2** In the menu that appears, choose either View > List View or View > Icon View. The display will change accordingly.



## Searching for an Extension

You can search for an extension by using the first or last name that is associated with that extension.

### To search extensions

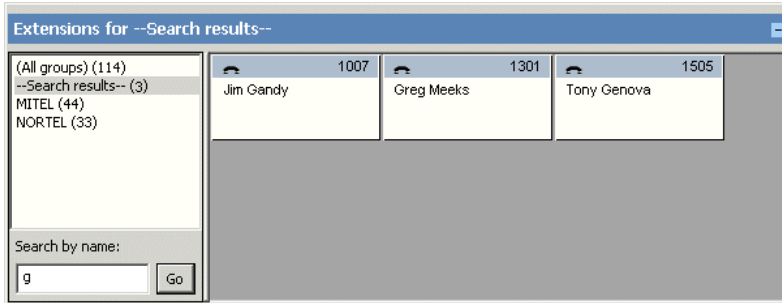
**Step 1** Go to the Search By Name box, found at the bottom of the Extension Groups area.

Search by name:



**Step 2** In the Search By Name box, enter one or more letters from the name (case does not matter).

**Step 3** The search finds all names (both first and last names) that begin with those letters, across all Extension Groups. The results are displayed in the Extension Status Area.



## Sorting Extension Groups

### To sort the list of Extension Groups

**Step 1** Right-click anywhere in the Extensions Group area.

**Step 2** Choose Sort Alphabetically or Sort Reverse Alphabetically from the menu that appears.

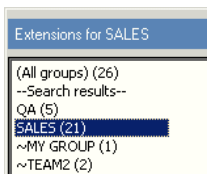


**Step 3** The list of Extension Groups is sorted accordingly.

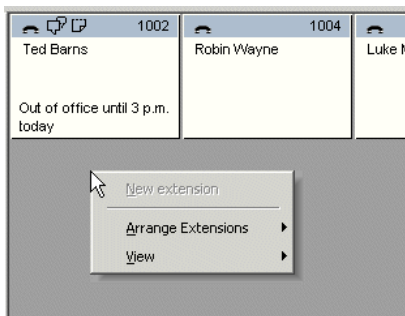
## Sorting Extensions

### To sort extensions while in Icon View

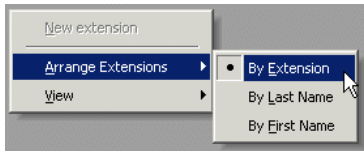
**Step 1** Click on the Extension Group that contains the extensions you want to sort.



**Step 2** Right-click in the Extension Status Area, in a gray area (not on an Extension Cell).



**Step 3** In the menu that appears, move the mouse cursor to Arrange Extensions. A submenu appears. Choose a sort option from the submenu.



**Step 4** The extensions are sorted accordingly.

#### To sort extensions while in List View

**Step 1** With the Extension Status Area set to List View, click on a column head, for example First Name.

	First name	Last name	Department	Extension
☺	Steve Jones			3200
☺	Evan Marks			3201
☺	George Joh...			3202
☺	James Wong			3250
☺	Paul Alexa...			3251

**Step 2** Extensions will be sorted in descending order. If you click the heading again, it will sort in ascending order.

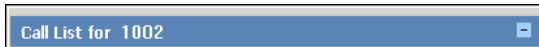
	First name	Last name	Department	Extension
☺	Steve Jones			3200
☺	George Joh...			3202
☺	Evan Marks			3201
☺	Paul Alexa...			3251
☺	James Wong			3250

## Expanding the Extensions Panel

You can choose to expand the Extensions Panel by hiding the Call List and the CPS panel (if it is open).

#### To expand the Extensions Panel

**Step 1** Go to the Call List title bar and click the Minimize button on the right end. This hides the Call List Panel.



The Call List title bar, with the Minimize button



Minimize button

**Step 2** To show the Call List Panel again, click the Maximize button on the end of the Call List title bar.


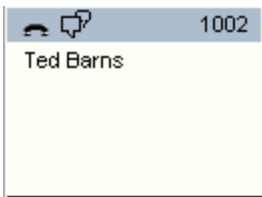




Maximize button

## Overview of Instant Messaging

It is possible to use two types of Instant Messaging within VistaPoint, either Windows Messenger or VistaPoint Instant Messaging. Both types cannot be enabled at the same time. Your administrator decides which type will be enabled in the entire system.

You can tell which type of IM has been enabled by looking at extension cells in the Extension Status Area:

Type of Instant Messaging	Icon	Icon As Seen in Extension Cell
VistaPoint Instant Messaging		
Integrated with Windows Messenger		

For more information:

See [Using Windows Messenger](#).

See [Using VistaPoint Instant Messaging](#).

## Using Windows Messenger

### Overview of Windows Messenger Integration

VistaPoint Enterprise can integrate with Microsoft Windows Messenger. This is a system-wide option that must be enabled by your administrator.

Windows Messenger integration provides the following features:

- ⌘ Permits users to send an instant message from a VistaPoint client, using Windows Messenger.
- ⌘ Shows that a user is present, as indicated by the Windows Messenger icon in that person's VistaPoint Enterprise extension cell.
- ⌘ Shows the state of an extension. The Windows Messenger icon changes according to whether the extension is idle, ringing, or off-hook.

**Note:** *When using Windows Messenger, it may take a moment for the IM icon to update and show a user's change in status (on the phone, busy, etc.).*

### REQUIREMENTS

- ⌘ You must be running Windows XP or Windows 2000.
- ⌘ Windows Messenger version 5.0 or later is required.
- ⌘ VistaPoint Enterprise supports all three Microsoft messaging servers: Exchange 2000 IM Server, Office Live Communication Server (LCS), and MSN Server.

## ABOUT MSN MESSENGER

You should not have Microsoft MSN Messenger running on your PC. Only Microsoft Windows Messenger can integrate with VistaPoint Enterprise. However, you can sign in to your MSN Messenger account using Windows Messenger - see the next section, Working with Multiple Instant Messaging Servers.

Due to similarities between Windows Messenger and MSN Messenger, they are frequently confused. To determine which you are running, check the Help > About box, or look at the Windows Title Bar at the top of the application. It will say either "MSN Messenger" or "Windows Messenger."

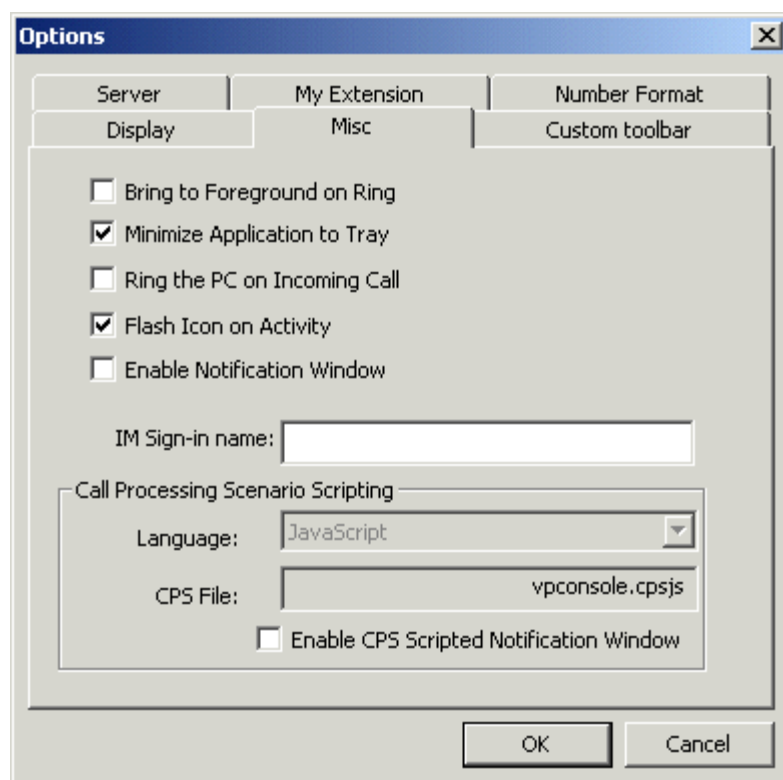
## Working with Multiple Instant Messaging Servers

The IM Sign-in Name is used if you are integrating VistaPoint with Microsoft Windows Messenger, and you want to connect with several instant messaging servers at the same time.

### To configure the sign-in name for Windows Messenger integration, using Console Companion or Desktop Companion

**Step 1** From the menu bar, select Settings > Options. The Options dialog box will appear.

**Step 2** Click the Misc tab.



**Step 3** Go to the IM Sign-in Name box and enter the sign-in name you wish to use in the VistaPoint system. This sign-in name will allow you to connect Windows Messenger to multiple Microsoft instant messaging servers (Exchange, LCS, and MSN) at the same time.

Make sure your VistaPoint IM Sign-in Name matches the name you use to sign-in to your corporate Instant Messaging service. If you are already signed-in to MSN, the VistaPoint IM Sign-in Name will default to your MSN sign-in name.

**Step 4** If you are signed in to more than one server, make sure that all other VistaPoint user sign-in names have been added to your Windows Messenger Contact List or you will not be able to send messages to those users.

**Step 5** Click the Close button.

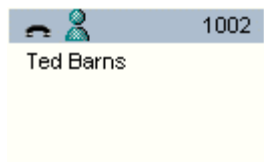
**Note:** Windows Messenger integration may not be available on your system. See your administrator for more

information.

## Sending a Message

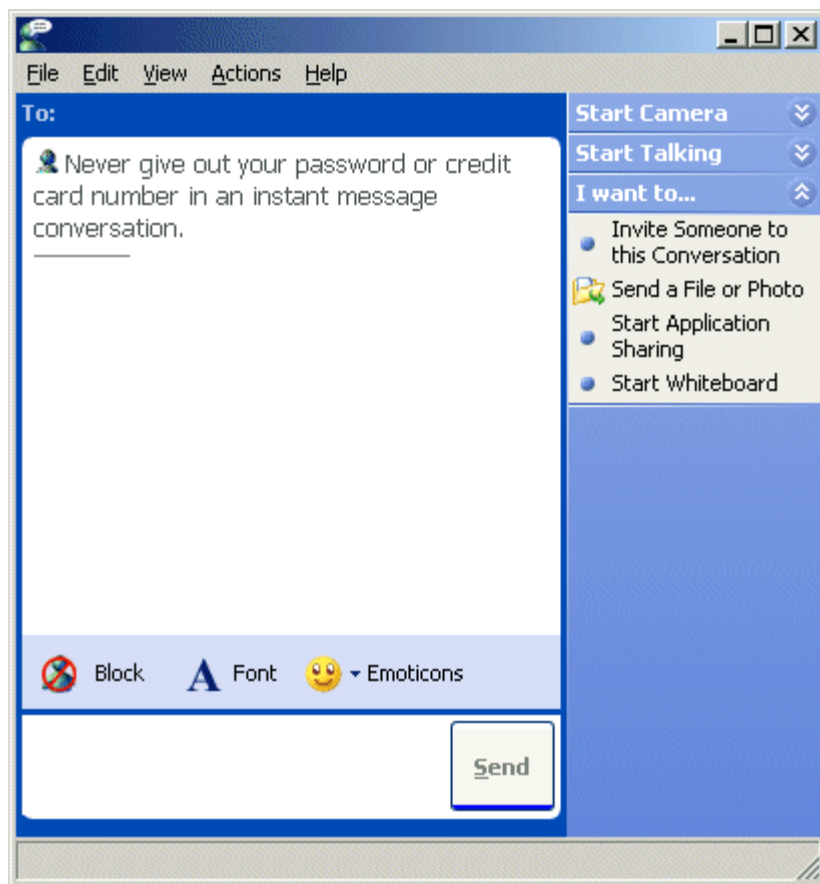
### To send a message through Windows Messenger

- Step 1** Make sure Windows Messaging integration is enabled in your system. See [Overview of Instant Messaging](#).
- Step 2** Verify that the recipient is able to receive Windows Messenger messages. To do this, go to the Extension Status Area. The recipient's extension cell must show the Windows Messenger icon. If there is no icon, then the person is not currently running Windows Messenger and cannot receive an instant message.



*Windows Messenger icon in an extension cell*

- Step 3** To start the message, right-click on the Extension Cell for the extension where you want to send the message, and choose Send IM.
- Step 4** The Conversation window appears. This window is part of the Windows Messenger application.



- Step 5** Type a text message in the lower part of the Conversation window.
- Step 6** Click the Send button. When the person replies, the text will appear in this same window.

## Using VistaPoint Instant Messaging

### Overview of VistaPoint Instant Messaging

VistaPoint Instant Messaging provides an easy way to send and receive text messages from within VistaPoint clients.

### Sending an Instant Message

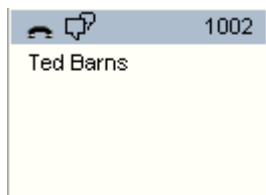
#### To send a message using VistaPoint Instant Messaging

**Step 1** Make sure VistaPoint Instant Messaging is enabled in your system. See [Overview of Instant Messaging](#).

**Step 2** Before you send the instant message, check that the VistaPoint "IM" icon appears at the top of the recipient's Extension Cell.



*VistaPoint Instant Messenger icon*



*VistaPoint Instant Messenger icon in an Extension Cell*

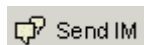
The IM icon shows that the person has launched a VistaPoint Companion program and is able to receive VistaPoint instant messages.

If no IM icon appears, you can still send the IM, but the user will not receive it until they start up VistaPoint Companion. This is called a Sticky Note.

**Step 3** To begin an instant message, right-click on an Extension Cell and choose Send IM.

Or you can enter the Extension number in the Call Box, and then do any one of the following:

- Click the Send IM button.

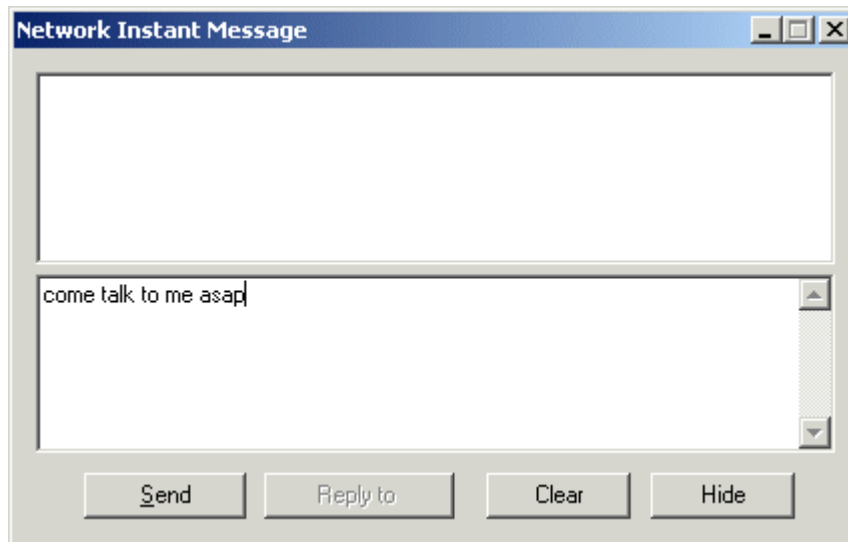


- Press Ctrl + I.
- Choose Calls > Send IM.

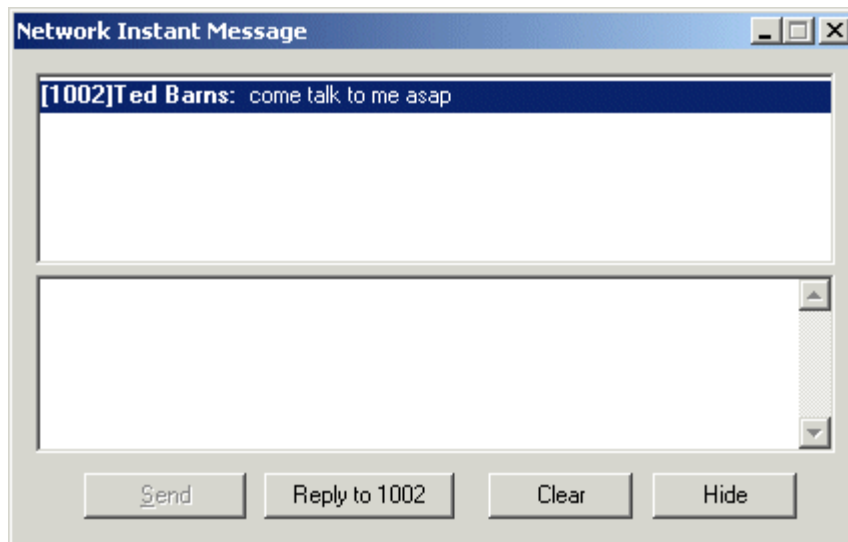
**Note:** You can send a single instant message to more than one person. First select all the recipients by holding down the Ctrl or Shift keys while selecting their extensions. Use Shift+click to select a group of consecutive extensions. Use Ctrl+click to pick out individual (non-consecutive) extensions. To send the instant message click the Send IM button, or use one of the other methods described above.

**Step 4** When the Network Instant Message window appears, type your message in the lower portion of the window. Then click the Send button.



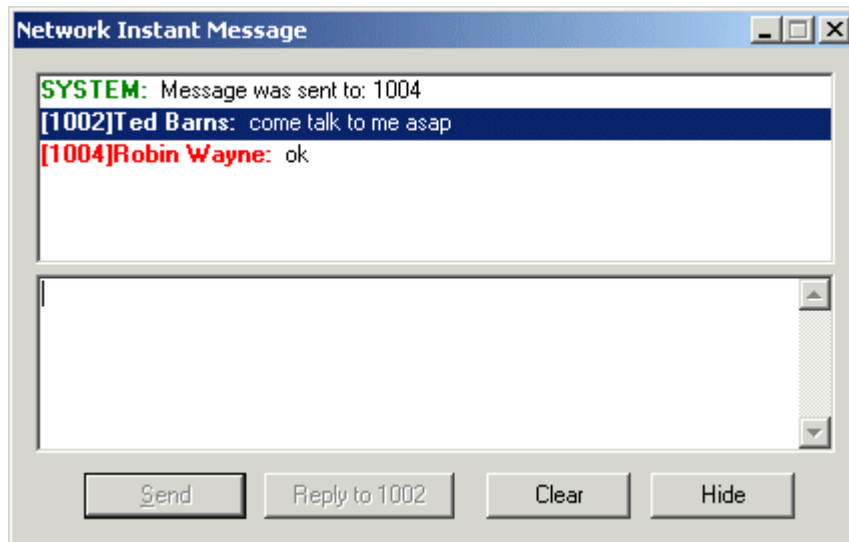


**Step 5** The message is instantly popped onto the recipient's screen (if they are logged on), allowing them to respond. The following example shows how the recipient will see your instant message:



**Note:** *Instant Messages should be less than 255 characters. Otherwise only the first line of the message will be sent.*

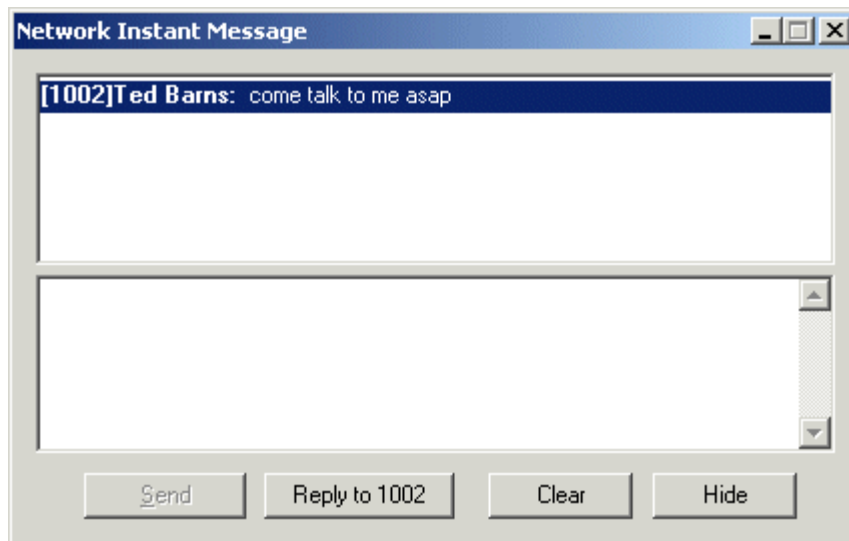
**Step 6** If the person replies to you, the Network Instant Message window will pop up again. The example below shows how a reply will appear on your computer. You can now type a response and click Send again, if you wish.



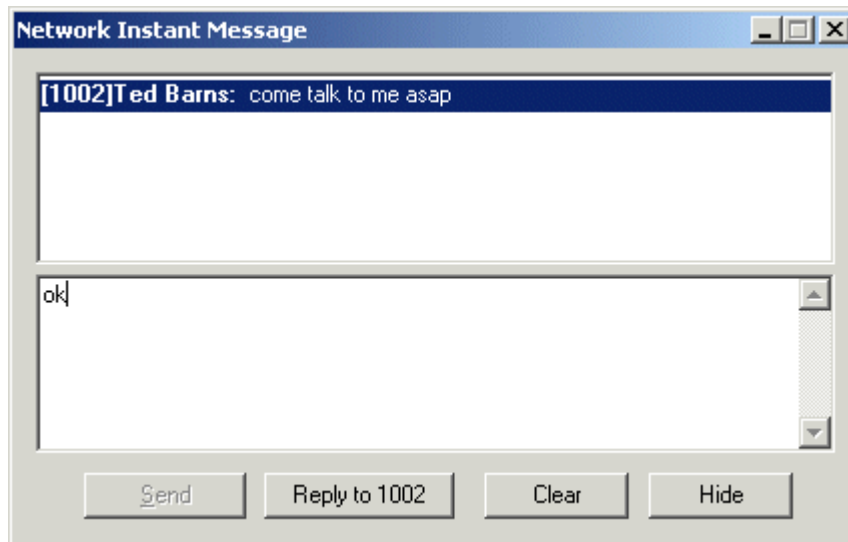
## Replying to a Message

### To reply to a message sent through VistaPoint Instant Messenger

**Step 1** When you receive an instant message, the Network Instant Message window will appear.



**Step 2** Type a reply in the bottom pane of the Network Instant Message box.



**Step 3** If more than one person ("sender") appears in the top part of the window, select the person you want to reply to.

**Step 4** Click the Reply button. (The Reply button will not become active until you type some text.)

## Clearing the History

### To clear the IM history

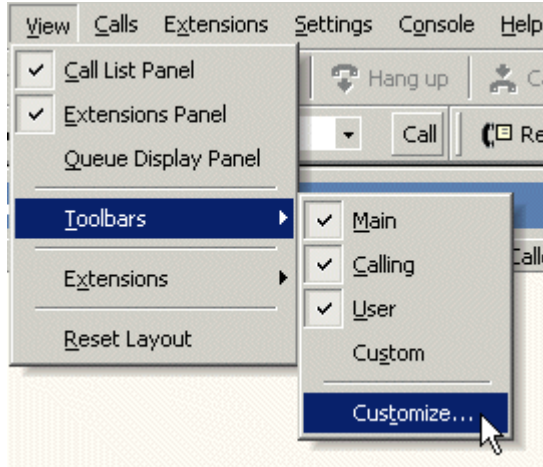
To delete past messages from the Network Instant Message window, click the Clear button at the bottom of the window.

## Sticky Notes

If you send an Instant Message to someone who is not logged into VistaPoint Companion, your message will immediately pop up the next time they log in. This is called a Sticky Note. Sticky Notes are a good way to make sure someone gets a message when they begin work for the day or when they return to their computer.

## Overview of Customization

You can customize the toolbar and keyboard commands. Customization options are accessed through selecting View > Toolbars > Customize.

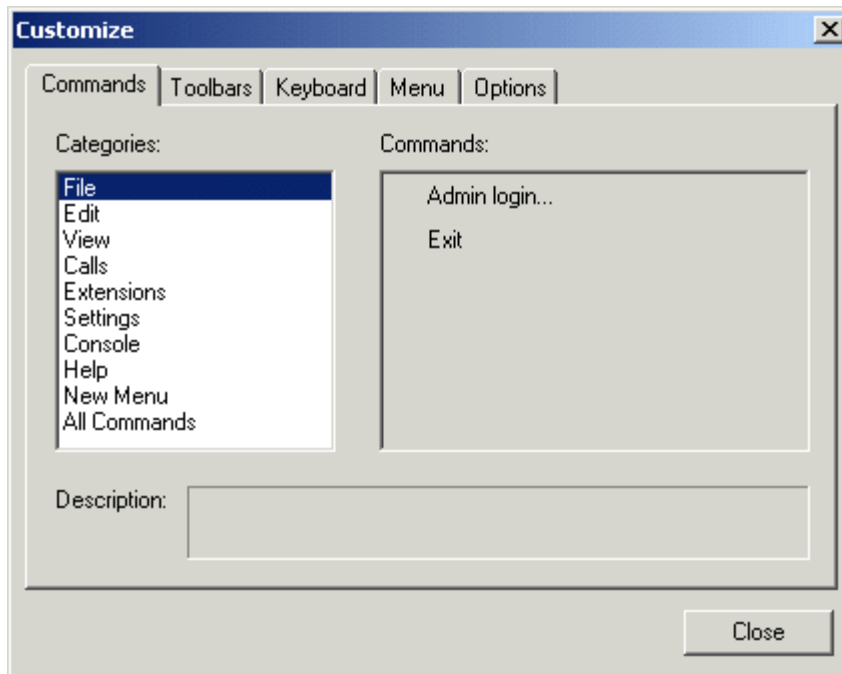


## Customizing Tool Bars

### Changing Buttons

#### To add buttons to the toolbar

**Step 1** Choose View > Toolbars > Customize > Commands tab.



**Step 2** Click on a category of commands in the Categories area. These categories correspond to the standard menus.

**Step 3** In the commands area, click and drag a command to a toolbar, and release the mouse. A new button appears on the

toolbar for that command.

**Step 4** Click the Close button.

### To move or remove buttons from the toolbar

**Step 1** Choose View > Toolbars > Customize > Commands tab.

**Step 2** As long as the Customize dialog box remains open, you can freely move and remove buttons.

To move a button, drag it to a new location on the toolbars.

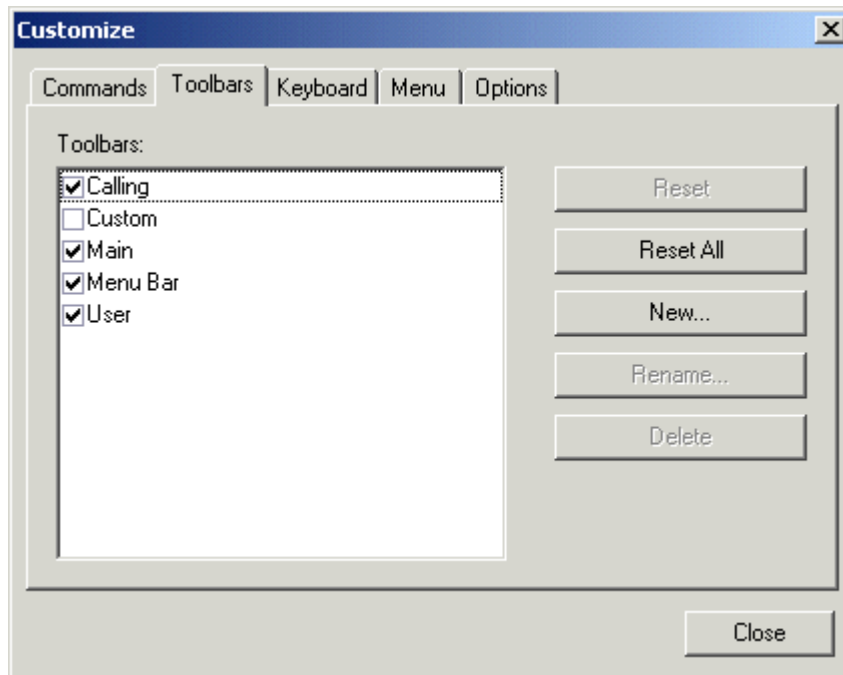
To remove a button, drag it over the Customize dialog box and release the button. The button disappears.

**Step 3** When you are finished, click the Close button.

## Changing Tool Bars

### To hide a toolbar

**Step 1** Choose View > Toolbars > Customize > Toolbars tab.



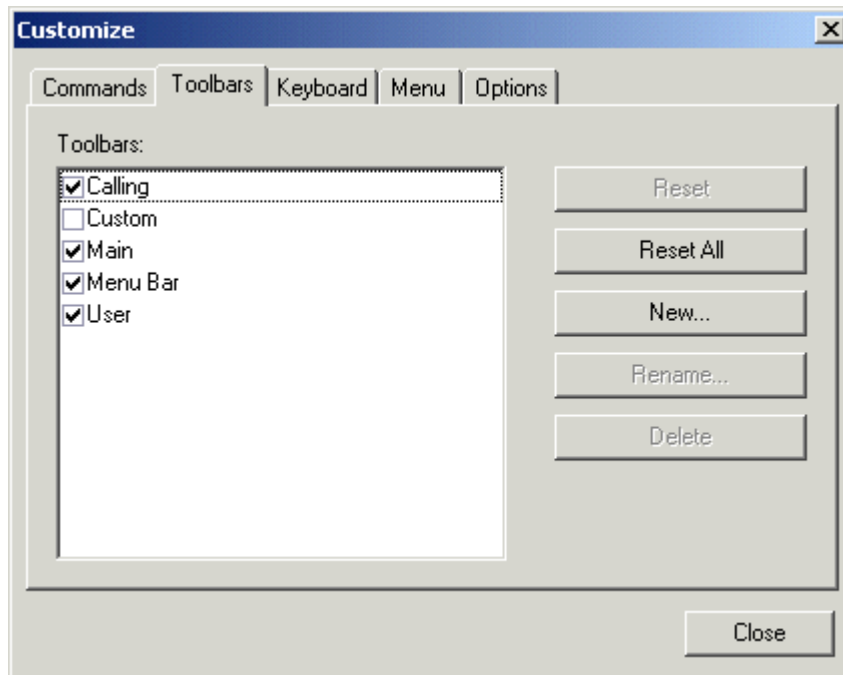
**Step 2** Uncheck the box next to the toolbar you want to hide. The toolbar disappears from the main window.

**Step 3** Click Close.

**Note:** You cannot hide the Menu Bar toolbar.

### To create a new toolbar

**Step 1** Choose View > Toolbars > Customize > Toolbars tab.



- Step 2** Click the New button. The Toolbar Name dialog box appears.
- Step 3** Type a name for the toolbar, and click OK. An empty, truncated toolbar appears.
- Step 4** Drag the new toolbar to a position with the other toolbars.
- Step 5** Click Close.
- Step 6** Add buttons to the toolbar, as desired. See [Changing Buttons](#).

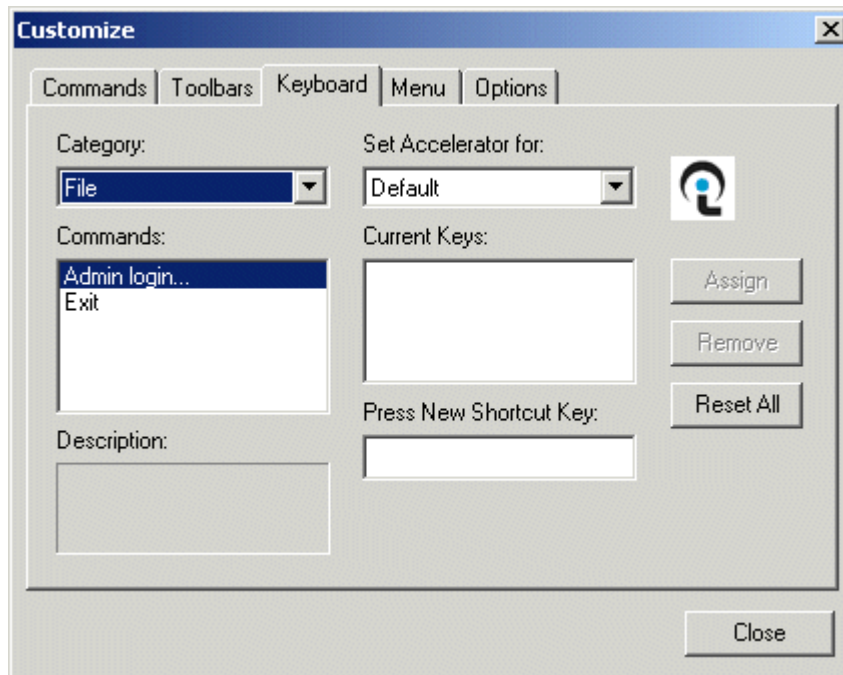
## Tips

- ⌘ To add a spacer between buttons, open the Customize dialog box and drag the button slightly away from its neighbor. To remove the spacer, hold down the Alt key while dragging slightly toward the neighbor button.
- ⌘ To copy a button, hold down Ctrl while dragging the button slightly to the left or right.
- ⌘ Use the Rename and Delete buttons in the Customize dialog box to rename and delete toolbars.

## Customizing Key Assignments

### To change the keystrokes for a command

- Step 1** Choose View > Toolbars > Customize > Keyboard tab.



**Step 2** Choose a category from the Category list. These categories correspond to the standard menus, and contain all the commands in that menu.

**Step 3** Choose a command from the Commands list. This is the command for which you will change the keystrokes. If there is currently a keystroke set to invoke that command, it will appear in the Current Keys box on the right in the dialog box.

To assign new (additional) keystrokes to this key, click in the Press New Shortcut Key box. Then press the key or combination of keys you want to use to invoke that command. Click the Assign button. (If the keys are already assigned to another command, the name of that command will be displayed below. You cannot use those keystrokes until you remove them from the command that is already using them.)

To unassign keystrokes for that command, select the command in the Current Keys box and click the Remove button.

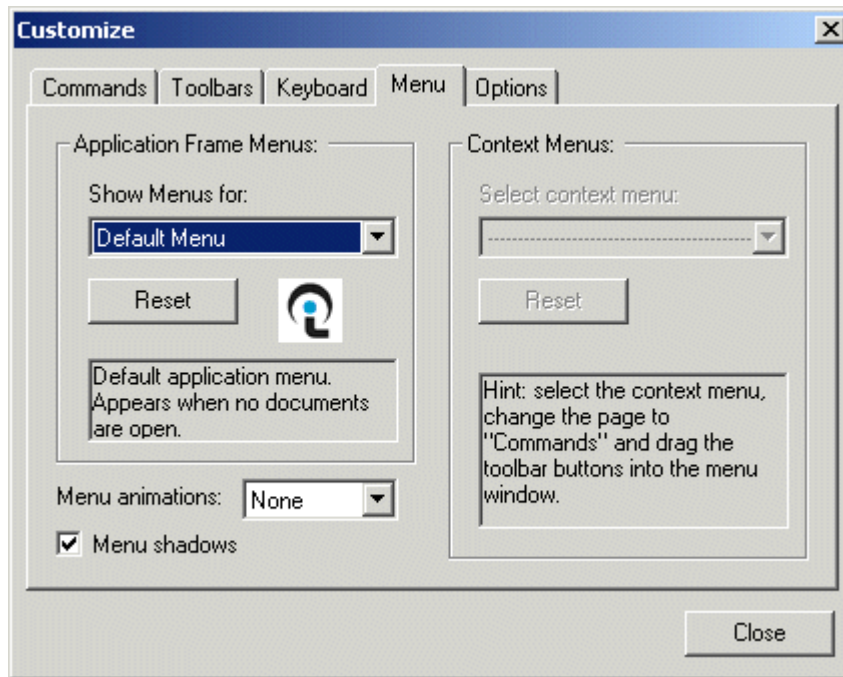
To reset all key assignments back to the original defaults, click the Reset All button.

**Step 4** When you are finished, click the Close button.

## Customizing Menus

### To customize the menus

**Step 1** Choose View > Toolbars > Customize > Menu tab.



**Step 2** Many of the features in this dialog box are not currently available. However you can do the following:

Use the Reset button to set menus back to defaults.

Use the Menu Animations list to change menu animations.

Use the Menu Shadows check box to enable/disable display of shadows behind menus when they are displayed.

You can add, move, or delete the commands that appear in menus. To do this, switch to the Commands tab, open a menu, and change drag commands to and from the Command tab.

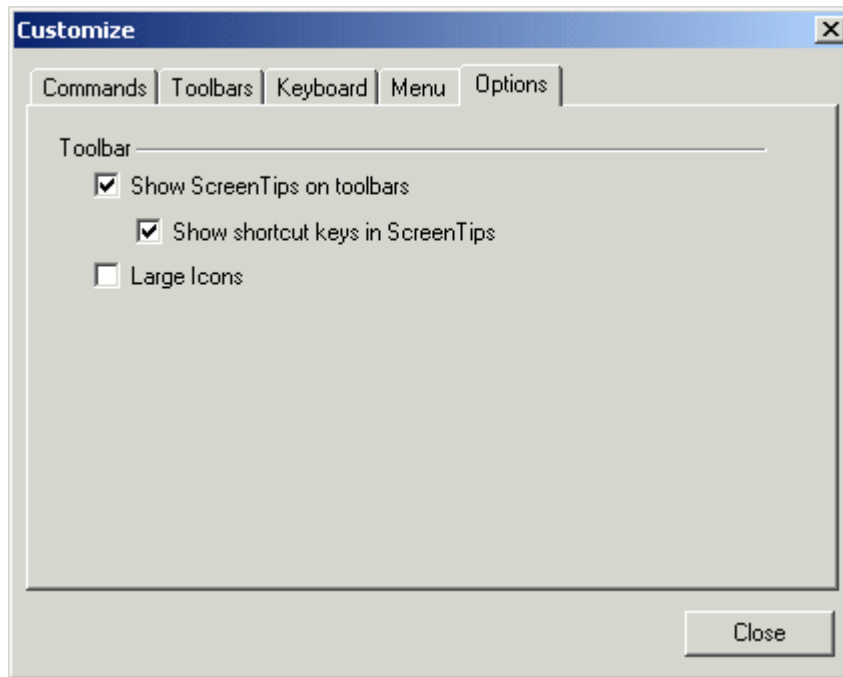
**Warning:** *While the Customize dialog box is open, you can remove entire menus. However, this is not recommended. Never remove the View menu, which would prevent you from accessing the Customize dialog box and prevent you from resetting back to the defaults.*

## Customizing Misc. Options

### To change options

**Step 1** Choose View > Toolbars > Customize > Options tab.





**Step 2** Check or uncheck the following options in this dialog box:

- ⌘ **Show ScreenTips on Toolbars** - Shows tool tips over a button, when the mouse is left to hover over the button.
- ⌘ **Show Shortcut Keys in ScreenTips** - Includes the key assignment for a command as part of button tool tips.
- ⌘ **Large Icons** - Displays larger buttons in the toolbars.

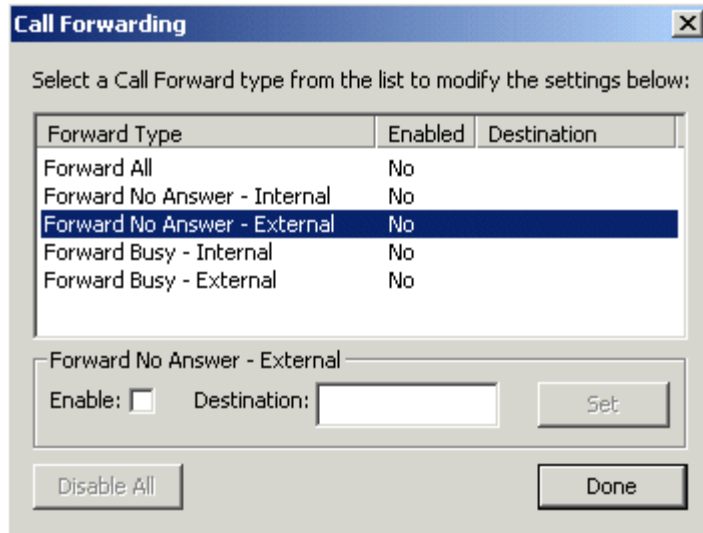
**Step 3** Click Close when you are finished.

## Configuring Call Forwarding

### To set call forwarding rules

**Step 1** From the menu bar, choose Settings > Forward Calls.

**Step 2** The Forward Calls dialog box appears.



*Example of forwarding options that you may see*

Your phone system determines which call forwarding options are available. The following are examples of some forwarding settings that may be available to you in the Call Forwarding dialog box:

**Forward All** - Forward all calls.

**Forward No Answer - Internal** - Forwarding for internal calls that are not answered.

**Forward No Answer - External** - Forwarding for external calls that are not answered.

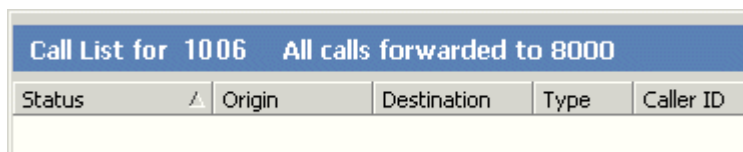
**Forward Busy - Internal** - Forwarding for internal calls when your extension is busy.

**Forward Busy - External** - Forwarding for external calls when your extension is busy.

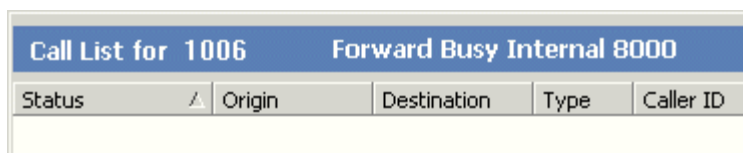
**Step 3** Set each forwarding option that you want. Select a forwarding option, check the Enable box, and enter the extension to where calls should be forwarded.

**Note:** *If you do not set a forwarding option for a type of forwarding, forwarding will be handled according to the default settings in your phone system.*

**Step 4** Click Done. The forwarding setting you have enabled will now be indicated in the Call List title bar.



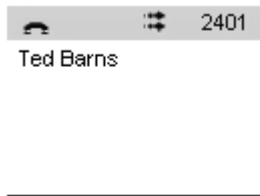
*Example: "Forward All Calls" enabled*



*Example: "Forward, Busy, Internal" setting enabled*

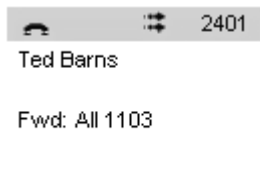
In addition to the toolbar messages, the Extension Cell will also change to indicate that forwarding is set. The cell will

turn gray and the forwarding icon (double arrows) will be displayed.



*Extension Cell (gray) set to forward, with forwarding icon displayed*

In addition, if Show Forward Info is enabled, an extra line for call forwarding information will also appear in the Extension Cell. (To enable forwarding info, choose View > Extensions > Show Forward Info.)



*Example: Forwarding info indicates all calls will forward to extension 1103*

If you have more than one type of forwarding set up at the same time, the title bar will indicate "Multiple Forwarding..." To see all the forwarding types that are set, hold the mouse cursor over the text in the title bar. A text "tool tip" will appear.

**Note:** Call Forwarding may not be available with your phone system. Check with your system administrator.

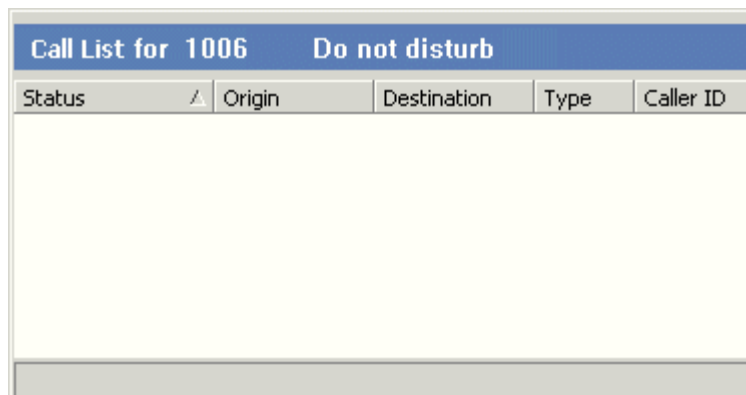
**Note:** Changes to Forwarding settings that are made through the telephone handset may not be displayed in VistaPoint. Some phone systems do not permit this feature.

## Configuring Do Not Disturb

### To set Do Not Disturb

**Step 1** From the menu bar, choose Settings > Do No Disturb, or press Ctrl+D.

**Step 2** The label "Do Not Disturb" appears in your Call List Title Bar. All calls are now forwarded, according to your "forward - busy" settings (see [Configuring Call Forwarding](#)).



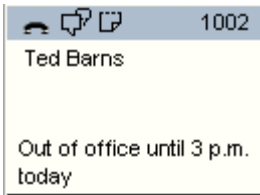
*Do Not Disturb mode*

**Step 3** To take your extension off Do Not Disturb, choose Settings > Do Not Disturb again.

**Note:** Do Not Disturb may not be available with your phone system. Check with your system administrator.

## Setting a Status Note

You can insert a text Status Note into your Extension Cell that will be visible to all VistaPoint Enterprise users.



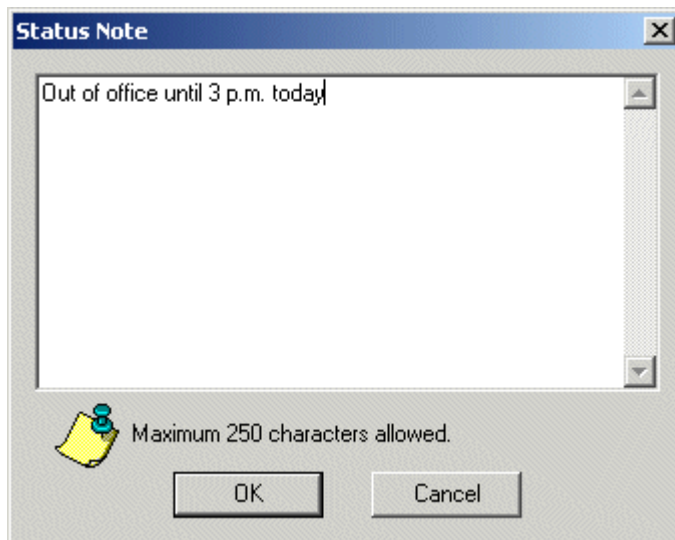
*Example of a Status Note in an Extension Cell*

### To set a Status Note

**Step 1** In the Main Window, do one of the following:

- ⌘ Choose Settings > Set My Status Note from the menu bar.
- ⌘ Right-click on the Extension Cell and choose Edit Status Note
- ⌘ Press Ctrl+T

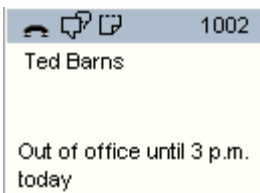
The Status Note window appears.



**Step 2** Type a short text message (up to 250 characters).

You can add a time stamp to the message by pressing Ctrl + T.

**Step 3** Click OK. The Status Note has now been added to your Extension Cell, and will be visible to all users in the system.



An icon will also appear in your Extension Cell, indicating that you have a Status Note.



*Status Note icon*

**Step 4** To change or delete your Status Note, bring up the Status Note window again, and change or delete the text.

## Paging

**Note:** *Paging may not be available in your phone system. Check with your system administrator.*

Two types of paging are available using Console Companion:

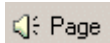
- ⌵ **Overhead paging** allows you to use Console Companion to announce a page over the office loudspeaker system.
- ⌵ **Station-to-station paging** allows you to announce a message through the speaker of an extension's speaker phone.

Only one type can be set up in a VistaPoint Enterprise system at a time. Ask your system administrator which type has been set up for your system.

Paging is available in Console Companion, but not in Desktop Companion.

### To make an overhead page

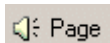
- Step 1** Make sure your system administrator has set up Paging in Console Companion. This is done by choosing Console > Paging Setup. The settings are determined by your phone system.
- Step 2** Office loudspeaker systems are often divided into zone numbers. Find out the number for the paging zone where you want your page to be heard.
- Step 3** Click on your own Extension Cell. This selects the cell.
- Step 4** Pick up your telephone handset (do not talk through a speakerphone).
- Step 5** Click the Page button, or press F11.



- Step 6** Using the telephone keypad, press the number for the page zone you want to use.
- Step 7** Speak your paging message into the telephone handset. It will be heard from the office overhead speaker system in the page zone you chose.

### To make a station-to-station page

- Step 1** Make sure your system administrator has set up Paging in Console Companion. This is done by choosing Console > Paging Setup. The settings are determined by your phone system.
- Step 2** Click the Page button, or press F11.



**Note:** *Alternatively, you can enter a number in the Call Box (use the keyboard or click on an Extension in the Extension Status Area). Then choose Calls > Page, or press F11.*

- Step 3** Wait for the extension to ring once.
- Step 4** Speak your paging message into the telephone handset. It will be heard out of the handset at the extension you are paging.

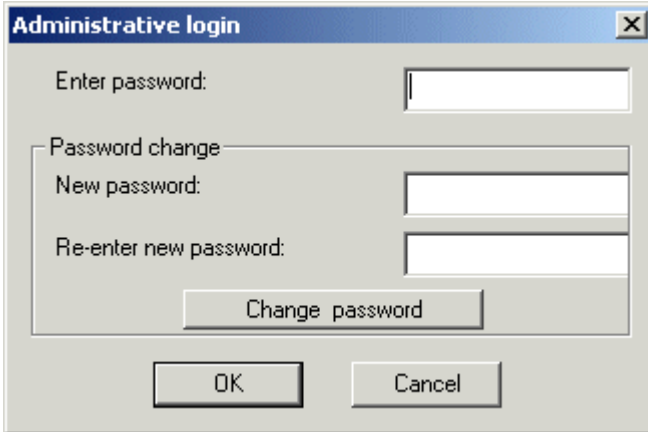
## Logging in as Administrator

Logging in as the administrator provides access to restricted features, such as changing your extension number, as well as paging setup, global extension administration, and server connection options.

### To log in as administrator

- Step 1** On the menu bar, choose File > Admin Login. (If "Admin Login" is grayed out, you are already logged in as administrator.)

This will display the Administrative Login dialog box.

A screenshot of the 'Administrative login' dialog box. It has a title bar with a close button. The dialog contains three input fields: 'Enter password:', 'New password:', and 'Re-enter new password:'. Below the 'New password' and 'Re-enter new password' fields is a 'Change password' button. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

**Step 2** Enter the Server password in the Enter Password box. If you do not know the administrative password, contact your system administrator.

### To change the Administrative Password

**Step 1** From the menu bar, choose File > Admin Login.

**Step 2** Enter the current administrative password in the Enter Password box. This is the password that was created when the VistaPoint Enterprise Server (PCE server) was installed.

**Step 3** Enter a password in the New Password box. Then re-enter the same password in the Re-Enter Password box.

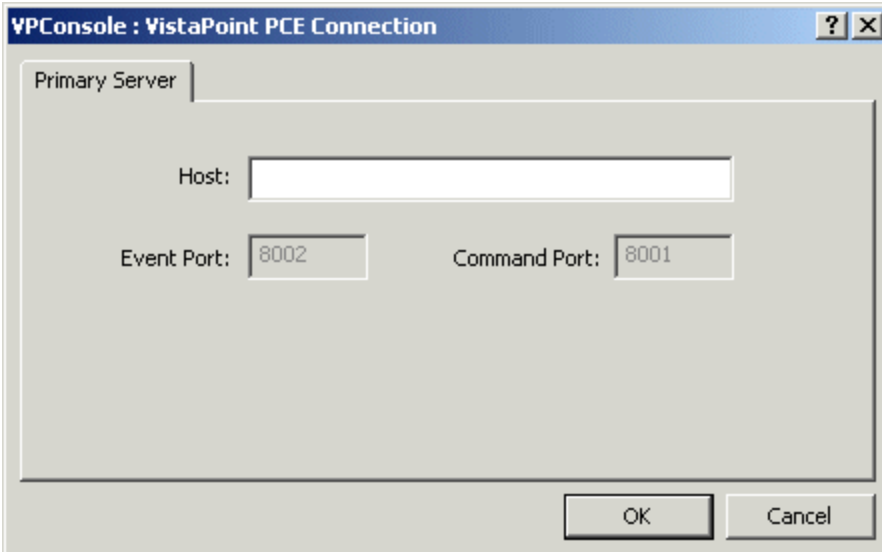
**Step 4** Click the Change Password button. Then click OK in the confirmation box that appears.

### Logging Out as Administrator

To log out as administrator, simply close the program. To do this, choose File > Exit.

## Connecting to the VistaPoint Enterprise Server

When your VistaPoint Enterprise client is started for the first time, the VistaPoint PCE Connection dialog box will appear, where you must identify the name of the VistaPoint Enterprise server. If you see this screen, contact your system administrator.

A screenshot of the 'VPCOnsole : VistaPoint PCE Connection' dialog box. It has a title bar with a help button and a close button. The dialog has a tab labeled 'Primary Server'. Below the tab is a 'Host:' label followed by an empty text input field. Below that are two input fields: 'Event Port:' with the value '8002' and 'Command Port:' with the value '8001'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

**Host** - Enter the IP address of the main VistaPoint Enterprise server.

**Note:** If you mistakenly enter a wrong IP address, just close and restart the program. The VistaPoint PCE Connection dialog box will appear again, where you can retype the address.

## Setting Your Password

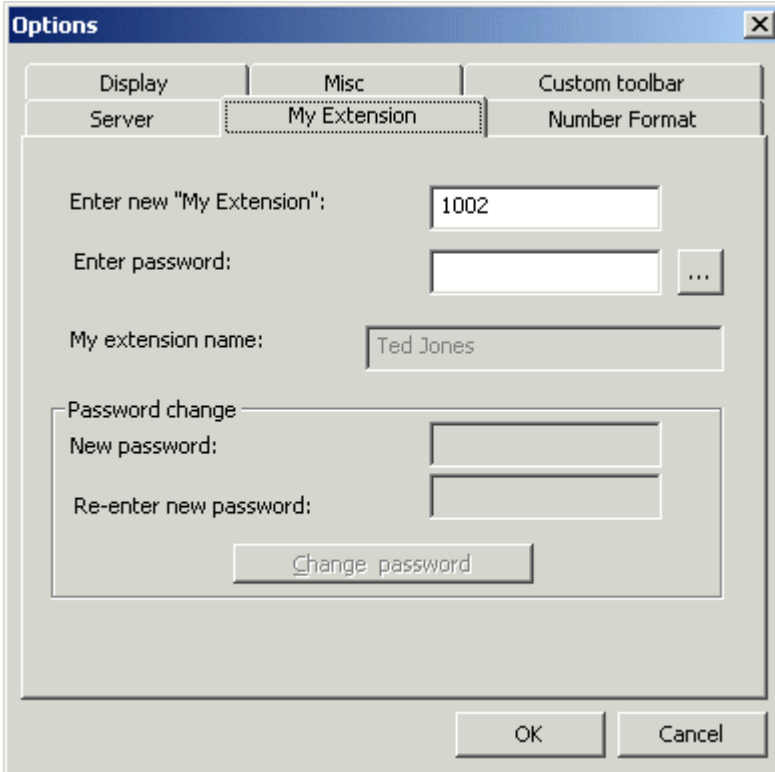
### Creating Your Personal Password

The first time you start VistaPoint Companion, you should create a personal password. Setting a personal password is not required, but it is recommended. It prevents another person from controlling your extension number.

**Note:** The personal password is not the same thing as the system administrator password, which is explained in [Logging in as Administrator](#).

#### To create your personal password

- Step 1** From the menu bar, select Settings > Options.
- Step 2** The Options dialog box will appear. Click the My Extensions tab.)



The screenshot shows the 'Options' dialog box with the 'My Extension' tab selected. The dialog has a title bar with a close button. Below the title bar are three tabs: 'Display', 'Misc', and 'Custom toolbar'. Under 'Misc', there are three sub-tabs: 'Server', 'My Extension', and 'Number Format'. The 'My Extension' sub-tab is active. The main area contains the following fields and controls:

- 'Enter new "My Extension":' with a text box containing '1002'.
- 'Enter password:' with a text box and a password icon button (three dots).
- 'My extension name:' with a text box containing 'Ted Jones'.
- A 'Password change' section containing:
  - 'New password:' with a text box.
  - 'Re-enter new password:' with a text box.
  - A 'Change password' button.
- 'OK' and 'Cancel' buttons at the bottom.

(If you are logged in as administrator, none of the fields will be grayed out in the My Extension tab.)

- Step 3** Click the "..." button next to the Enter Password box. The text boxes at the bottom of the dialog box will no longer be grayed out.
- Step 4** In the New Password box, enter a password.  
Then type the new password again in the Re-enter Password box.
- Step 5** Click the Change Password button.
- Step 6** Click the OK button to save the settings.

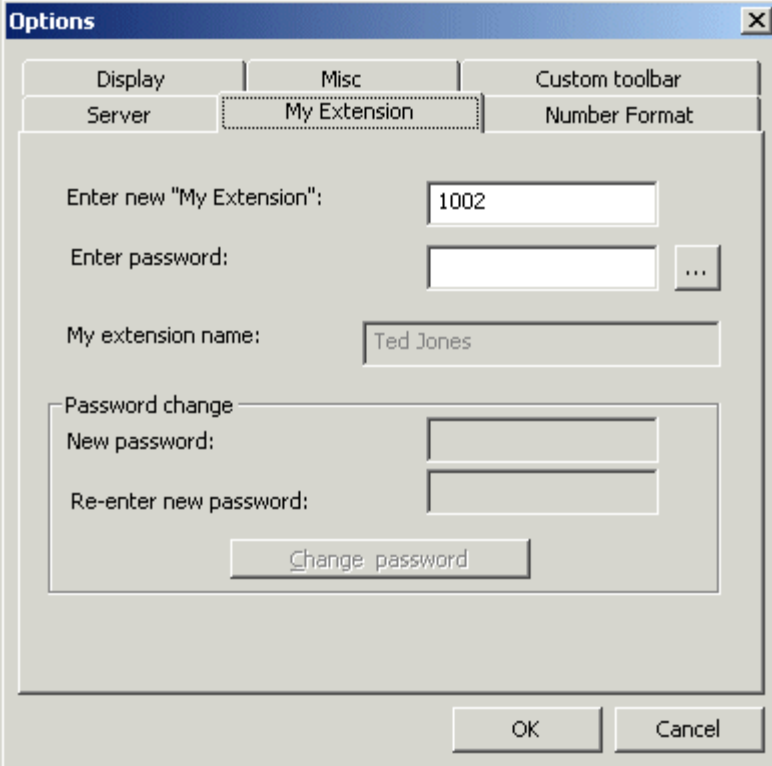
## Changing Your Personal Password

### To change your personal password

**Step 1** From the menu bar, select Settings > Options.

**Step 2** The Options dialog box will appear. Click the My Extensions tab. )

If you are not logged in as administrator, you will see a dialog box like the one below. You can gain access to the grayed out settings by entering your personal password in the New Password field and the Re-Enter New Password field.



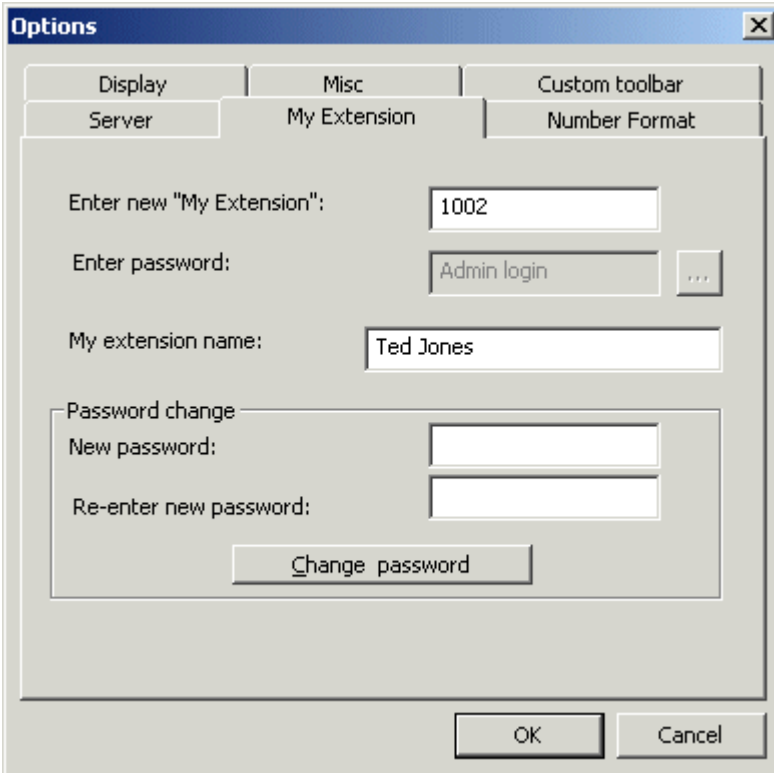
The screenshot shows the 'Options' dialog box with the 'My Extension' tab selected. The dialog has a title bar with a close button. Below the title bar are three tabs: 'Display', 'Misc', and 'Custom toolbar'. Under 'Misc', there are two sub-tabs: 'My Extension' (which is active and highlighted with a dotted border) and 'Number Format'. The 'My Extension' sub-tab contains the following fields and controls:

- 'Enter new "My Extension":' with a text box containing '1002'.
- 'Enter password:' with a text box and a small button with three dots to its right.
- 'My extension name:' with a text box containing 'Ted Jones'.
- A section titled 'Password change' containing:
  - 'New password:' with a text box.
  - 'Re-enter new password:' with a text box.
  - A 'Change password' button.

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

If you are logged in as administrator, you will see a dialog box like the one below:





The screenshot shows a dialog box titled "Options" with a close button (X) in the top right corner. The dialog has a tabbed interface with three tabs: "Display", "Misc", and "Custom toolbar". The "Misc" tab is selected, and within it, the "My Extension" sub-tab is active. The "Number Format" sub-tab is also visible. The main area contains the following fields and controls:

- "Enter new 'My Extension':" A text box containing "1002".
- "Enter password:" A text box containing "Admin login" and a button with three dots "...".
- "My extension name:" A text box containing "Ted Jones".
- A section titled "Password change" containing:
  - "New password:" An empty text box.
  - "Re-enter new password:" An empty text box.
  - A button labeled "Change password".

At the bottom of the dialog are "OK" and "Cancel" buttons.

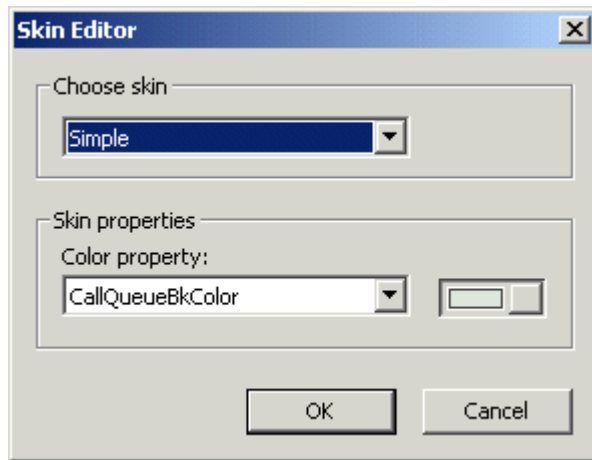
- Step 3** Enter your personal password in the Enter Password field, and then click the "." button. If you are logged in as Administrator, you are already logged in here automatically.
- Step 4** Enter a new password in the New Password box.  
Then type the new password again in the Re-enter Password box.
- Step 5** Click the Change Password button.
- Step 6** Click the OK button to save the settings.

## Changing Interface Colors

You can customize the colors used in VistaPoint Console. The color scheme used is called a "skin."

### To change interface colors

- Step 1** In the VistaPoint Console menu, choose Settings > Skins. The Skin Editor dialog box appears.



**Step 2** If you want to use a pre-configured skin, go to the Choose Skin drop-down list and choose a scheme other than Default. Click OK to close the Skin Editor and apply the new scheme.

If you want to make general changes to the colors of extension cells only, go to Choose Skin and choose Standard. Click OK to close the Skin Editor. Then choose Help > Color Legend. In the Color Legend, double-click on the cells to change their colors. Click OK to close the Color Legend and apply the new cell colors.

If you want to use your own custom colors, and you want to change individual component colors throughout the window, choose a skin other than Default (the Standard scheme is recommended). Select each part of the interface in turn in the Color Property drop-down list. Then click the button to the right, to change the color of that property. (See [Overview of the Main Window](#) for a description of various parts of the window.) Within the names of the color properties, "Bk" means background color. For example, CallQueueBkColor is the background of the Call List. Some of the non-default skins also have different icons from the Default icons. Click OK to set your changes.

**Note:** To reset all colors back to default, choose Settings > Skins, and then set the Choose Skin to Default.

## Minimizing the Program to the System Tray

### To minimize the program

**Step 1** Click the Minimize button in the top, right part of the Title Bar.

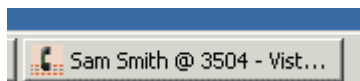


**Step 2** If the Minimize Application to Tray option is enabled, the program is minimized to the System Tray. (The Minimize Application to Tray setting is set in Settings > Options > Misc. tab.) To maximize the program again, double-click on the VistaPoint Companion icon, or right-click on it and select Open VistaPoint Console.



*VistaPoint Companion icon in the Windows System Tray*

If the Minimize Application to Tray option is not enabled, the program is minimized to the Task Bar. To maximize the program, click once on it in the Task Bar.

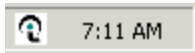


*Minimized to the Windows Task Bar*

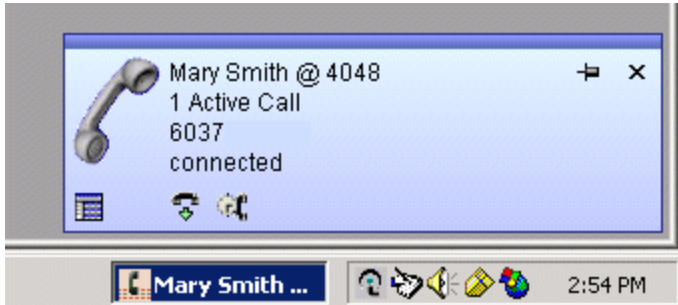
## Running in Tray Icon Mode

## Overview of Tray Icon Mode

If you want to use the minimum desktop space for Console Companion you can run in Tray Icon mode. In this mode, the program will appear as an icon in the System Tray. When call activity occurs on your extension, it will be displayed as small notification popup window that appears from the System Tray.



Tray Icon

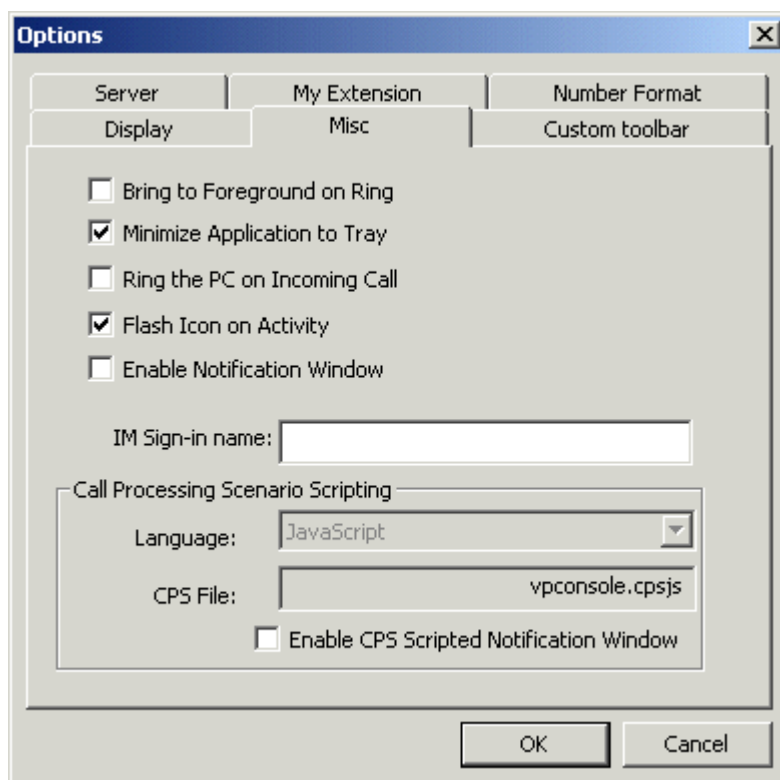


Notification Popup Window

## Enabling Tray Icon Mode

### To enable Tray Icon mode

- Step 1** In Console Companion, choose Settings > Options. The Options dialog box appears.
- Step 2** Click on the Misc tab.



- Step 3** Check the box labeled Run Application as Tray Icon Only. When you do this, the check box labeled Enable Notification Window will also be automatically checked.

**Step 4** Click OK. Tray Icon mode is now enabled.

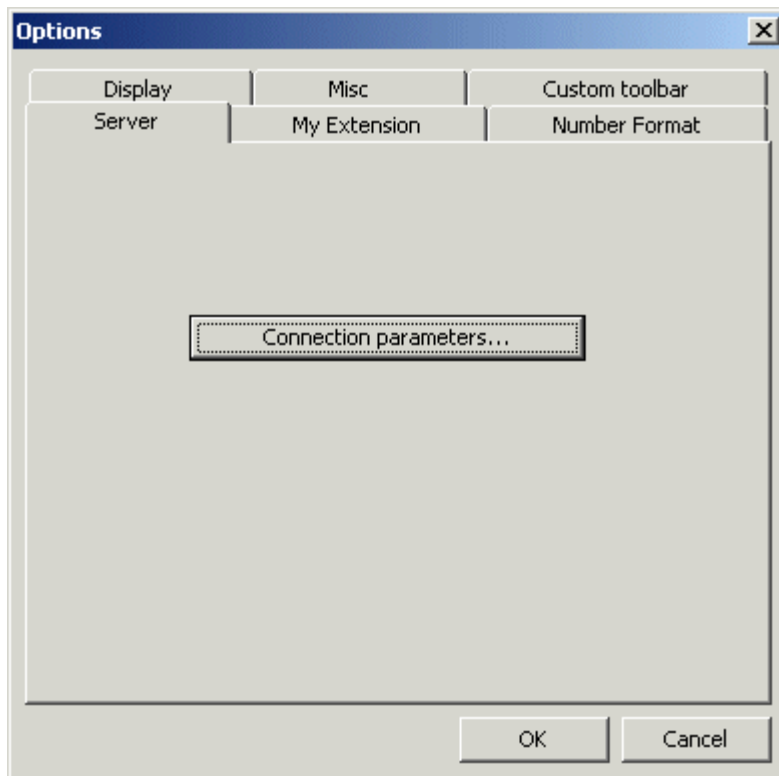
Whenever you want to disable Tray Icon mode, open the Options dialog box again and uncheck Run Application as Tray Icon Only and Enable Notification Window.

## Setting Options

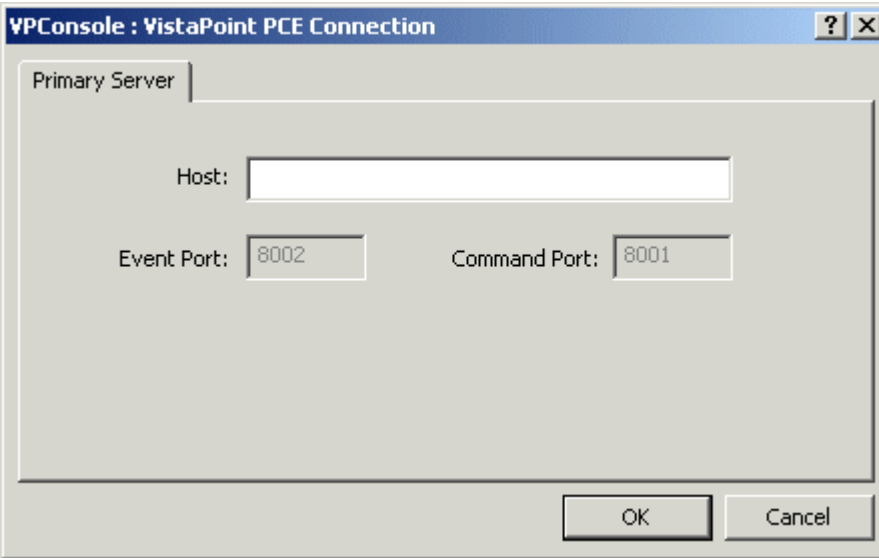
### Server Options

#### To set server connection options

**Step 1** From the menu bar, select Settings > Options. The Options dialog box will appear.



**Step 2** In the Server tab, click the Connection Parameters button. The VistaPoint PCE Connection dialog box appears.



**Host** - Enter the IP address of the VistaPoint Enterprise server. Ask your system administrator for this information.

**Step 3** Click the OK button to save the settings.

## My Extension Options

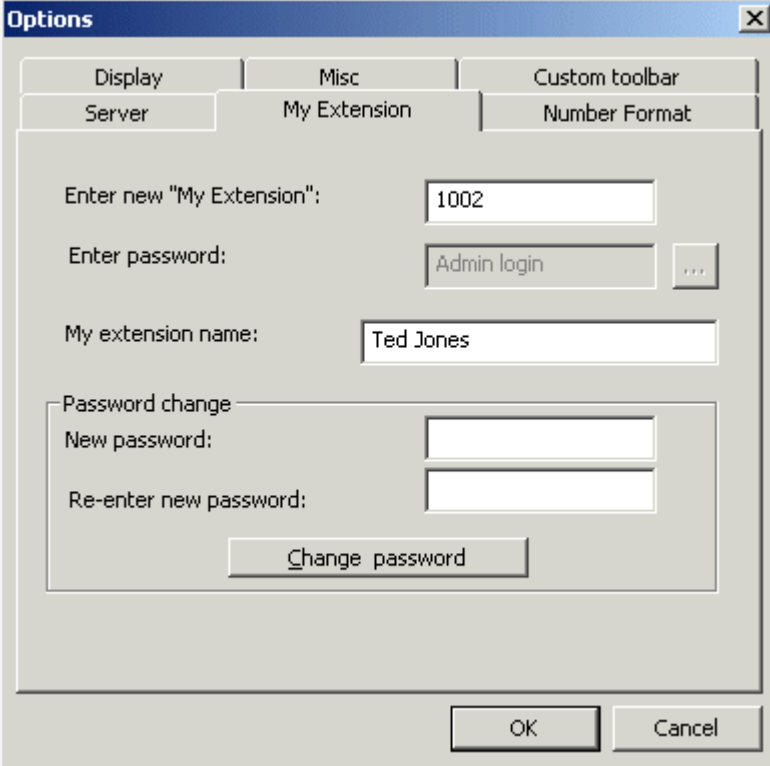
The My Extension tab allows you to set the name and extension number you will use in the VistaPoint Enterprise system. You can also set a personal password, to restrict changes to your name and extension number settings.

### To set My Extension options

**Step 1** From the menu bar, select Settings > Options.

**Step 2** The Options dialog box will appear. Click the My Extensions tab. (See [Logging in as Administrator.](#))

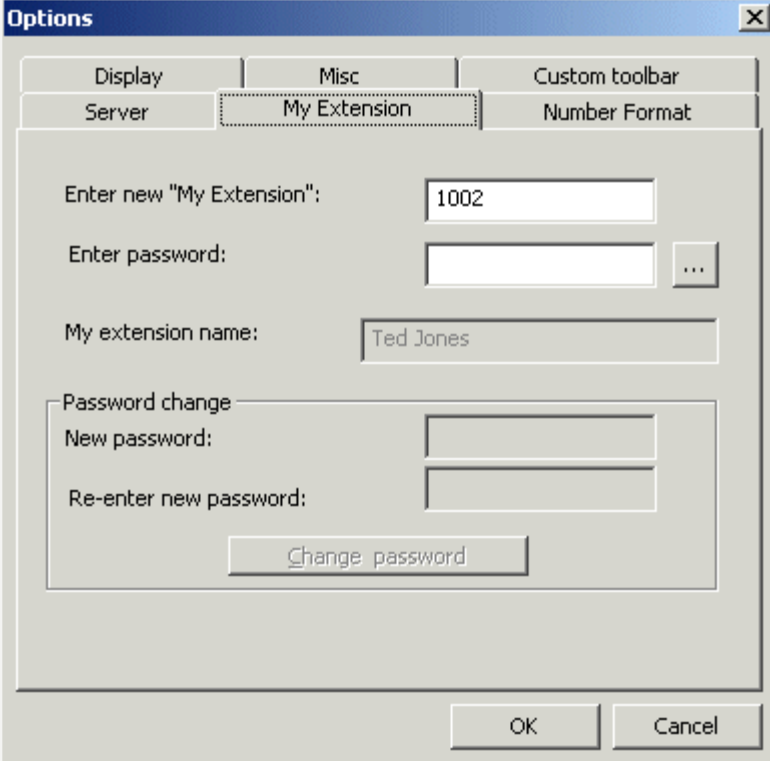
If you are logged in as administrator, you will see a dialog box like the one below:



The image shows a dialog box titled "Options" with a close button (X) in the top right corner. It has three tabs: "Display", "Misc", and "Custom toolbar". The "Misc" tab is selected, and it contains three sub-tabs: "Server", "My Extension", and "Number Format". The "My Extension" sub-tab is active. The dialog contains the following fields and controls:

- "Enter new 'My Extension':" text box with the value "1002".
- "Enter password:" text box with the value "Admin login" and a small "..." button to its right.
- "My extension name:" text box with the value "Ted Jones".
- A "Password change" section containing:
  - "New password:" text box.
  - "Re-enter new password:" text box.
  - A "Change password" button.
- "OK" and "Cancel" buttons at the bottom.

If you are not logged in as administrator, you will see a dialog box like the one below. You can gain access to the grayed out settings by entering your personal password in the New Password field and the Re-Enter New Password field.



The image shows the same "Options" dialog box as above, but with the "My Extension" sub-tab selected. The "Enter password:" field is empty, and the "New password:" and "Re-enter new password:" fields are grayed out. The "Change password" button is also grayed out. The "Enter new 'My Extension':" field still contains "1002" and the "My extension name:" field still contains "Ted Jones". The "OK" and "Cancel" buttons are still visible at the bottom.

**Step 3** Configure the settings in this tab, as desired:

**Enter New "My Extension"** - Enter the extension number that you will access on this computer. This number will be displayed in your Main Title Bar. This is the only setting in the My Extension tab that does not require a personal

password.

If the extension number you enter is protected by a personal password, you must enter that password in the Enter Password box.

**Enter Password** - Enter your personal password in this field and click the "..." button. If you are logged in as Administrator, you are already logged in here automatically.

If you have not yet set a personal password on this computer, leave the Enter Password box blank and just click the "..." button.

**My Extension Name** - Enter a new first and last name in this box. This is the name that will identify you to other users, such as when you send an Instant Message. However, this does not set the name that appears in your Extension Cell; that is set up by your system administrator.

**Step 4** If you have not yet created a personal password, you may do so in the My Extensions tab. This will prevent another user from using your extension number or name. To set a new personal password, do the following:

To change your personal password, first enter a new password in the **New Password** box. Then type the new password again in the **Re-enter Password** box. Then click the **Change Password** button.

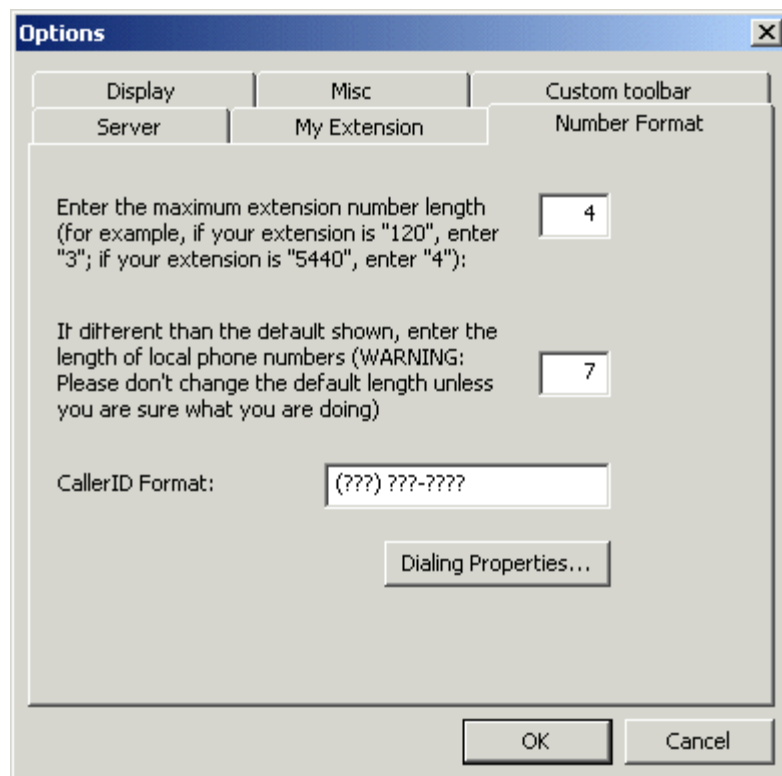
**Step 5** Click the OK button to save the settings.

## Number Format Options

### To set Number Format options

**Step 1** From the menu bar, select Settings > Options.

**Step 2** The Options dialog box will appear. Click the Number Format tab.



**Step 3** Configure the settings in this tab, as desired:

In the first box in this tab, enter the number of digits used for extensions in your phone system.

In the second box, enter the number of digits required to dial a local phone number, not including trunk prefixes such as 9.

In the **CallerID Format** field, use the default setting of "(???) ???-????" for most systems.

Click the **Dialing Properties** button to bring up a Windows dialog box that allows you to set your local dialing options.

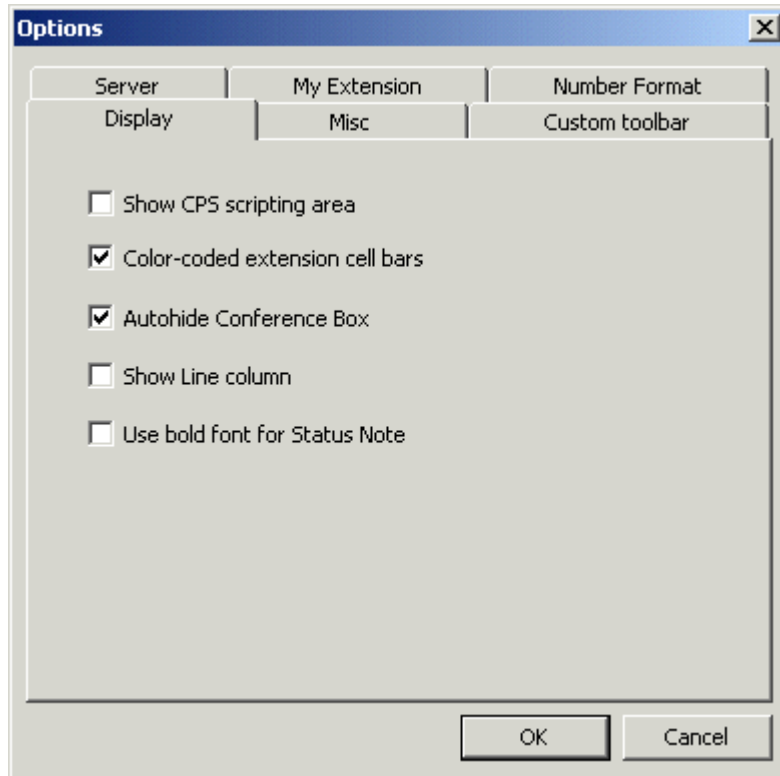
**Step 4** Click the OK button to save the settings.

## Display Options

### To set Display options

**Step 1** From the menu bar, select Settings > Options.

**Step 2** The Options dialog box will appear. Click the Display tab.



**Step 3** Configure the settings in this tab, as desired:

**Show CPS Scripting Area** - Check this option to show the CPS Scripting panel above the Call List. This option is disabled by default, and should remain unchecked unless CPS scripts are being used. See your administrator for more information.

**Color Coded Extension Cell Bars** - When this option is checked, call activity on extensions (and trunks) is indicated in the Extension Status Area by color changes in the Extension Cells. See [Extension Status Area](#). This option is checked by default.

Uncheck this option to make Extension Cells always remain the default color. The default color is blue, when using the default "skin." See [Changing Interface Colors](#).

After you change this setting, you must change to a different Extension Group or restart the program before the change will take effect.

**Autohide Conference Box** - If this option is checked, the Conference Box will remain hidden until you create a conference. See [Conference Calls](#). If this option is not checked, the Conference Box will always be displayed in the main window.

**Show Line Column** - Displays the Line column in the Call List. The Line column shows which line a call came in on.

**Use Bold Font for Status Note** - Enable this option to make all Status Note text bold, as it displays on your computer.

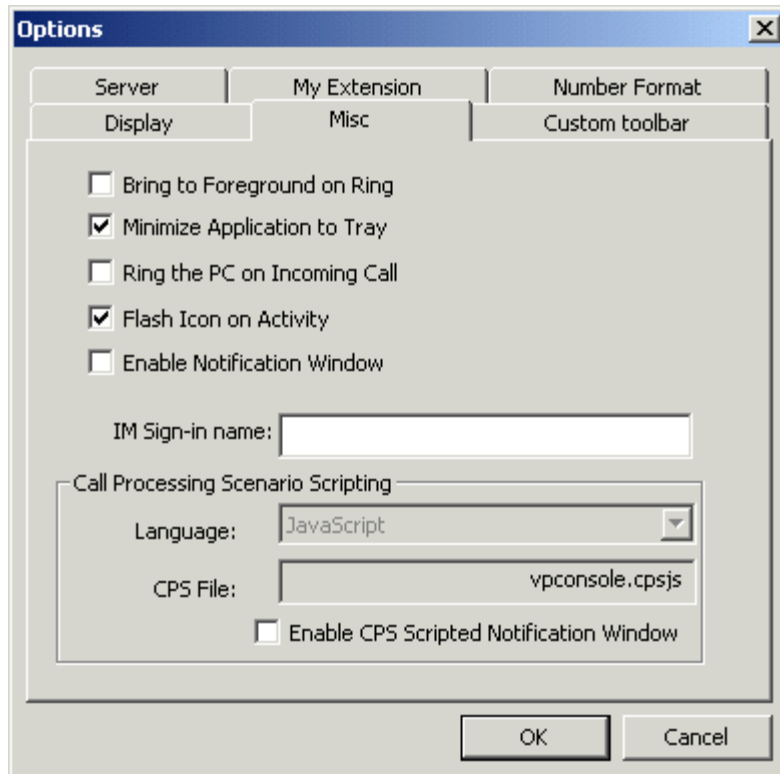
**Step 4** Click the OK button to save the settings.



## Misc. Options

### To set Miscellaneous options

- Step 1** From the menu bar, select Settings > Options.
- Step 2** The Options dialog box will appear. Click the Misc tab.



- Step 3** Configure the settings in this tab, as desired:

**Bring to Foreground on Ring** - Check this option to make the Main Window come to the front of all other programs when your extension rings.

**Minimize Application to Tray** - Check this option to make VistaPoint Companion go to the Windows System Tray when you minimize it. To restore the program, double-click the icon in the System Tray.



*VistaPoint Companion icon in the System Tray*

If this option is not checked, minimizing the program will cause it to appear in the Windows Task Bar rather than in the System Tray.

**Ring the PC on Incoming Call** - Check this option to make your PC speakers ring when a call comes into your extension. This requires that your PC has speakers and a sound card installed.

**Flash Icon on Activity** - When this is enabled, the VistaPoint Companion will flash when it is minimized to the system tray, if there is activity in VistaPoint Companion.

**Enable Notification Window** - Shows a small popup window from the System Tray whenever call activity occurs on your extension.

**IM Sign-in Name** - This setting is used if you are integrating VistaPoint with Microsoft Windows Messenger. Enter a sign-in name. This sign-in name will allow you to connect Windows Messenger to multiple Microsoft instant messaging servers (Exchange, LCS, and MSN) at the same time. See [Working with Multiple Instant Messaging Servers](#) for more information.)

**Call Processing Scenario Scripting** - For use in creating CPS scripts.

**Step 4** Click the OK button to save the settings.

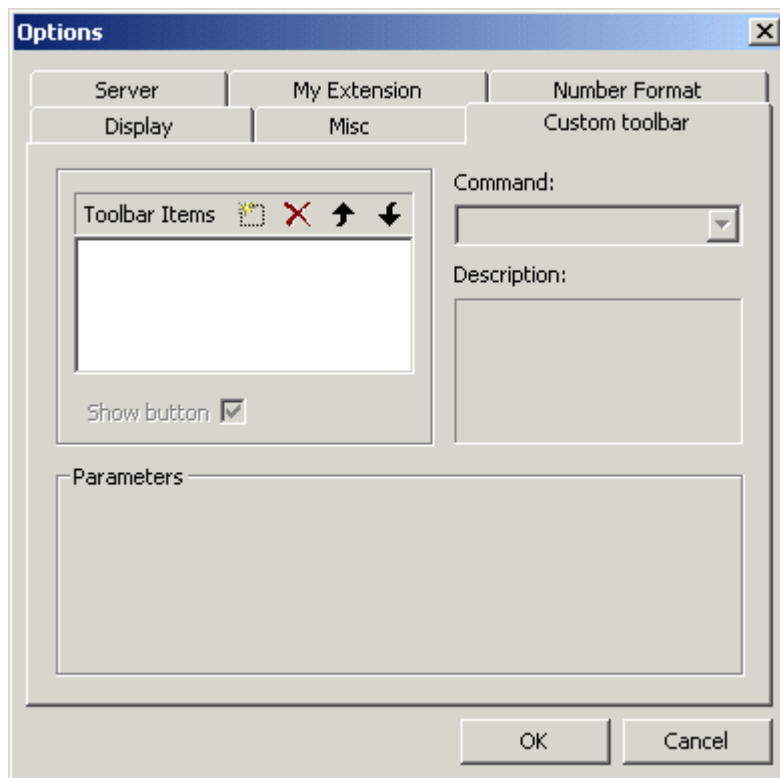
## Custom Toolbar

You can add custom "smart buttons" to the main toolbar. You can configure these buttons to launch programs or perform some other programmatic task.

### To create a custom button to launch an external program

**Step 1** Make sure the Custom toolbar is displayed. Enable it by choosing View > Toolbars > Custom from the menu bar.

**Step 2** From the menu bar, choose Settings > Options > Custom Toolbar tab.



**Step 3** Click the New (Insert) button.



*New button (shown circled)*

**Step 4** Enter a name for the custom button, and press the Enter key. An entry for the custom button appears in the Toolbar Items box.

**Step 5** While the new entry is selected, make sure the Command drop-down list is set to External Program.

**Step 6** In the Parameters area at the bottom of the dialog box, click the "..." button next to the Command box. Browse and select an executable file.

**Step 7** Enter settings in the Argument field as needed. Arguments are additional parameters that must be included with the initial command to execute the program.

**Step 8** Enter settings in the Working Directory field as needed. The Working Directory is the location where the program will look to find any related files it needs.

**Step 9** Click OK to close the Options dialog box. The new custom button will now appear in the Custom toolbar in the main window.

