

SmartOperator

User Guide

OAK-OPS-03
SmartOperator - Oak

SmartOperator - Oak

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Section One

Documentation

SmartOperator User Documentation

Introducing SmartOperator

SmartOperator is the Windows Operator Console (or WOC) of the SmartPhone Suite of software products by Oak Telecom. SmartOperator helps telephone operators and receptionists in medium-to-large companies to better answer incoming calls and handle call queues. Because everything is graphical, unlike other Operator Consoles, SmartOperator is very easy to use and learn, and requires almost no training.

Some of the features you can expect to use in SmartOperator are:

- **Call queues** – quickly answer any call from any queue.
- **Extension lists** – see at a glance which extensions are on the phone and whom they are talking to.
- **Search** – quickly find any contact or extension by typing their name or number, and quickly view the mobile/assistant telephone numbers of extensions.
- **Dial** – dial using your keyboard, just type a name or number and press enter.
- **Call Appearance** – at-a-glance information of which call is currently active.
- **Multiple tabs** – so that you can see “pages” of information, and switch between them by simply pressing a key.
- **Fully keyboard operated** – everything can be done at great speed by using the specially designed keyboard shortcuts, or if you prefer, you can still use your mouse.

This document is split into the following parts:

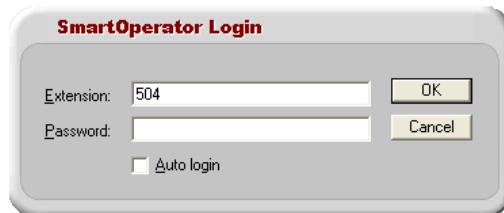
- **Starting SmartOperator** shows you how to load up SmartOperator.
- **The SmartOperator Menu** shows you what each of the items on the main menu does.
- **Configuring SmartOperator** guides you through advanced configuration of SmartOperator.
- **Using SmartOperator** explains how to do everything like control calls, search for contacts, etc.

There is also a document available containing Frequently Asked Questions and answers on SmartOperator. To obtain this document, please visit www.oak.co.uk or contact your dealer.

Starting SmartOperator

To begin using SmartOperator, click the **Start** button to bring up the **Start Menu**. From here, point to **Programs**, then **SmartOperator**, and then click the **SmartOperator** icon. The SmartOperator splash screen will appear.

If this is the first time you have started SmartOperator, you may be prompted for login details. Enter your extension number in the **Extension** box and your password in the **Password** box (you will probably not have a password set up. If you are unsure, contact your System Administrator). You may optionally place a checkmark in the **Auto login** box to stop SmartOperator from asking you for an extension number next time you log in. Finally, click **OK** and SmartOperator will load.



The image shows a dialog box titled "SmartOperator Login". It has a light gray background and rounded corners. At the top, the title "SmartOperator Login" is written in a bold, dark red font. Below the title, there are two text input fields. The first is labeled "Extension:" and contains the number "504". The second is labeled "Password:" and is empty. To the right of the "Extension:" field is a small "OK" button. To the right of the "Password:" field is a small "Cancel" button. Below these fields, there is a checkbox labeled "Auto login" which is currently unchecked.

If you receive an error message saying "**Those details are not correct. Please try again**", make sure that you are entering the correct extension number (and password) and if you still have problems, contact your System Administrator. You may be experiencing network problems.

If you receive an error message saying "**Number of licenses exceeded**", it means that too many people are already using SmartOperator. You will need to either purchase more SmartOperator licenses from Oak Telecom or have another user close the SmartOperator software before you try again.

When you have logged in, you will see a circle icon appear in the notification area near your system clock (by default at the bottom-right of the screen). This icon will be green if your phone is available, red if your phone is busy (i.e. you are on a call), flashing red if your phone is ringing, or yellow if your phone is in Forward All Calls mode (not available on all PBX platforms). If this icon is gray, it means you are not logged in. Try reloading the software, and if there is still a problem, contact your System Administrator.



By clicking on the circle icon, you bring up a menu that is described in the following section.

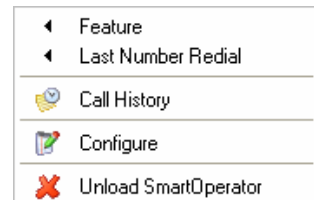
SmartOperator also displays a large window that takes up most of the space on your desktop (depending on your desktop screen resolution) and is known as your “workspace”.

To unload SmartOperator, either click **Cancel** on the **Login** window if it is visible, or click the **X** in the top-right hand corner of the main SmartOperator workspace. Alternatively, click the circle icon and select **Unload** from the menu that pops up.

The SmartOperator Menu

When you click the circle icon that is in the notification area of your taskbar, a menu will pop up with the following options available:

- **Feature**
- **Last Number Redial**
- **Call History**
- **Configure**
- **Unload SmartOperator**



Feature Codes

Pointing your mouse at the **Feature** menu will cause a new menu to appear which contains a number of different features of your telephone system like Do Not Disturb, Door Answer, Forward All Calls, and Suppress Caller Id. To use one of these features, instead of having to try and remember a long complicated feature code and dial it on your telephone, you can just click on the desired feature in the list (the feature codes for your phone system need to have been entered into SmartServer Configuration).

Last Number Redial

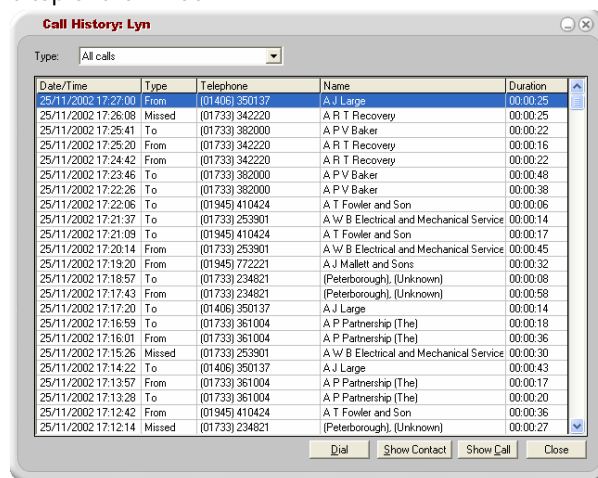
In the **Last Number Redial** menu, the names and numbers of the last 10 people that you were in contact with is displayed. Both calls that you made and calls that you received are included in this list. To call one of the contacts back, just click on them in the list.

Call History

Clicking this will bring up a new window which shows a recent call history for your extension. In the grid you can see the date and time that the call started the type of call (To, From, Missed, or No Answer), the telephone number of the other party, the name of the other party, and the duration of the call.

To call somebody from this window, just highlight the relevant row in the grid and click **Dial**. To bring up a contact's record card to see extra details such as their address and other telephone numbers, highlight them and click **Show Contact**. If you wish to see more detailed information about the call, such as when it was put on hold, how long it rang for, who it was transferred to, etc you can do so by highlighting the relevant call and clicking **Show Call**.

You can resize this window so that you can see more or less information, and you can also resize the column widths if you need to. You can also filter the information that you are viewing so that you can see the last 50 internal calls, external calls, or missed calls. To do this, select the desired call type from the **Type** dropdown list at the top of the window.



If you have the ability to view other extensions' call histories, this is the screen that you will see. The name of the person whose call history you are currently viewing is displayed in the colored caption bar at the very top of the window (after "**Call History:**").

Configure

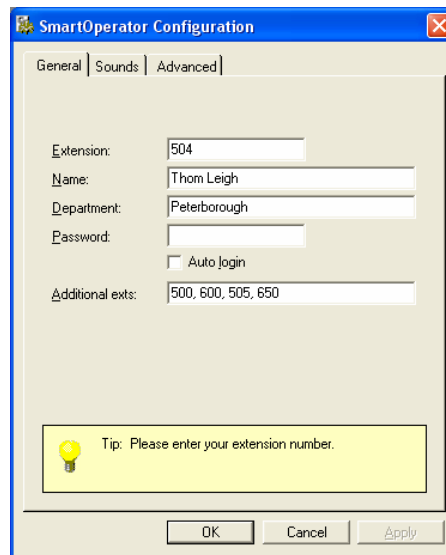
Clicking this displays the **SmartOperator Configuration** window. For information on what you can configure in SmartOperator, see the next section in this document.

Configuring SmartOperator

The **SmartOperator Configuration** window can be opened by clicking the circle icon and selecting **Configure**, or by clicking the **File** menu on the SmartOperator workspace and clicking **Configuration**.

SmartOperator configuration is split into 2 parts:

- **General** – set up basic things like the extension you log in as.
- **Sounds** – you can make SmartOperator play sounds to alert you to ringing calls.
- **Advanced** – these settings should never need changing.



The image shows a screenshot of the 'SmartOperator Configuration' dialog box. The window has a blue title bar with the text 'SmartOperator Configuration' and a close button. Below the title bar are three tabs: 'General', 'Sounds', and 'Advanced', with 'General' selected. The main area contains several input fields: 'Extension:' with the value '504', 'Name:' with 'Thom Leigh', 'Department:' with 'Peterborough', 'Password:' (empty), and 'Additional exts:' with '500, 600, 505, 650'. There is also an unchecked checkbox for 'Auto login'. At the bottom, there are 'OK', 'Cancel', and 'Apply' buttons. A yellow tip box at the bottom left contains a lightbulb icon and the text 'Tip: Please enter your extension number.'

General

On the **General** tab of the **SmartOperator Configuration** window, you can change your login details.

Enter the extension number you wish to log in as in the **Extension** box. If you change the number in this box, all the other options will become read-only until you restart SmartOperator and log in using the new details.

You can change the name and department that SmartOperator associates with your extension number by editing the relevant details in the **Name** and **Department** boxes. It is recommended that you leave these settings as they are; if the details need changing get your System Administrator to do it for you.

If you wish to use a password so that only you can log in to SmartOperator using your extension number, or if you wish to change a password that you have already assigned, you may do so by editing the text in the **Password** box. For security reasons, your password will appear as asterisks (e.g. *****) instead of the actual text. If you cannot remember your password, you must get your Systems Administrator to change it for you.

The **Auto login** checkbox changes the way SmartOperator logs you in when you load the software. If the checkbox has a tick in it, it means that SmartOperator will not ask you for your extension number every time you start the software. Under normal circumstances, you would have **Auto login** turned on because usually there would only be one telephone next to your computer that you would use. However, under some circumstances, the **Auto login** option should be left turned off (un-ticked), meaning you will need to enter your extension number every time you start the software.

In the **Additional exts** text box, enter a comma-separated list of extensions to monitor in addition to your own local extension.

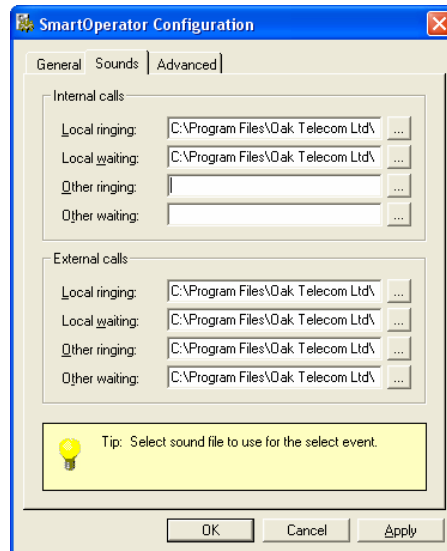
Sounds

On the sounds tab, you can configure wave files to play during certain types of call alerts. You can tell SmartOperator to play a different sound for each of the following events:

- Local extension is ringing due to an internal call
- Local extension has an internal call waiting to be answered (but local extension is already on a call)
- An internal call is ringing one of the additional extensions that are being monitored
- An internal call is waiting at one of the additional extensions that are being monitored
- Local extension is ringing due to an external call
- Local extension has an external call waiting to be answered (but local extension is already on a call)
- An external call is ringing one of the additional extensions that are being monitored
- An external call is waiting at one of the additional extensions that are being monitored

NB In order for sounds to be played, your computer must have a soundcard and speakers installed.

To configure a sound file to play, click the ... button next to the relevant textbox then browse to the .wav file. Sample sounds are included with the default SmartOperator install. They are installed into the Sounds subdirectory of the SmartOperator program directory.



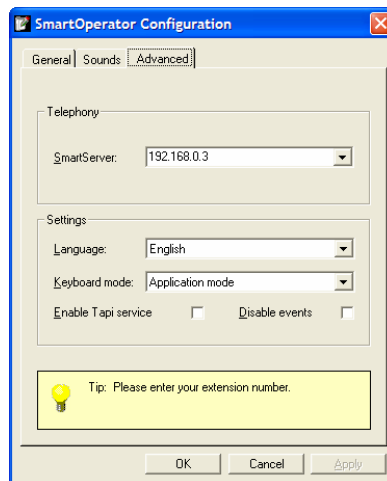
Advanced

On the **Advanced** tab of the **SmartOperator Configuration** window you will find advanced settings that never normally need to be changed.

In the **Smart Server** box, you can enter the IP address or NetBIOS machine name of the SmartServer computer you wish to connect to. This would normally be left as **(Find server automatically)** unless you are connecting to SmartServer over a WAN (such as the Internet) or VPN, or have more than one network device on your machine (such as a modem).

Place a checkmark in the **Enable TAPI Service** checkbox to install and enable the SmartPhone TSP. This enables you to make calls from TAPI-enabled applications by simply clicking the **Dial** button in the application. After you enable or disable the TSP you may need to restart your machine for changes to take effect.

If you tick the **Disable events** box, scripts that normally run when events happen will not run. You should always leave this box un-ticked unless advised otherwise by your system administrator.



From the **Keyboard mode** dropdown list, select **Always active** so that whenever you press any of the keys on the numeric keypad, SmartOperator will do what you typed – even if SmartOperator isn't the active window. If you select **Application mode**, SmartOperator will only respond to key presses on the numeric keypad when SmartOperator is the active window.

From the **Language** dropdown list, you can change the language that SmartOperator is displayed in, from the list of languages that are currently installed.

Using SmartOperator

This section of the document will show you around the SmartOperator workspace, and explain how you can use the keyboard to perform the most important SmartOperator actions. Using the keyboard to transfer calls etc can be much quicker than using your mouse.

The SmartOperator Workspace

The Workspace is the name given to the entire SmartOperator window and all the controls it contains. The workspace is made up of 11 areas. These areas are as follows:

SmartOperator control buttons – Control the behavior of SmartOperator

Call control buttons – Perform call control

Incoming call queue – Ringing calls for any extension being monitored

Operator calls queue – Ringing calls for the local extension

Held calls queue – Calls that have been held

Call appearance – Active call(s)

Extensions list – Searchable list of extensions with their status

Contacts directory – Searchable address book

Auto-display – Automatic display of active contact

Message folders – Read SmartPhone text messages

Search panel – For dialing/searching with your keyboard

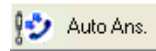
SmartOperator control buttons

These are the four buttons located at the top of the SmartOperator workspace above the two call queues.

The **DND** button toggles the Do Not Disturb mode of your telephone. While your telephone is in Do Not Disturb mode, it will not ring. Also, your status will be yellow (unavailable) on SmartPhone's **Extension Status**. When **DND** is turned on, the button will appear in the "pushed down" state.



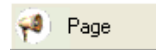
The **Auto Ans.** button toggles automatic answering of your telephone. When it is turned off, you will need to manually answer a call by using SmartOperator or your telephone handset. When Auto Answer is on, your telephone will be taken off hook automatically when a call rings in. When Auto Answer is turned on, the button will appear in the "pushed down" state.



Pressing the **Keys** button brings up a help window to remind you which keys you use on your numeric keypad to perform which actions in SmartOperator (see later in this document for more information).



Pressing the **Page** button will enable you to use your phone system's "page" mode (normally this would be used to make an announcement over a PA system for everyone to hear). This feature needs to have been set up on SmartServer before use.



Call control buttons

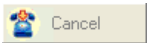
These four buttons are located near the bottom of your SmartOperator workspace underneath the call appearance panels.

The **Release** button is used to hang up the active call (the person you are talking to). This button is only enabled when there is an active call.



The **Hold** button is used to put the active call on hold (for example to set up an announced or consulted transfer). This button is only enabled when you have a connected call.

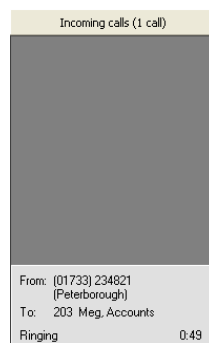
The **Transfer** button is used to complete an announced or consulted transfer. Use the **Hold** button to set up a transfer, and use this button to connect the original call and the second call. This button is available only when you have a call at your extension that is on hold pending transfer and an active consultation call.



The **Cancel** button is used to cancel a transfer and return you to the original call. This button is available when you have a call on hold pending transfer.

Incoming call queue

The incoming call queue is the long darker colored area on the left of your workspace headed **Incoming calls**. When a new call starts ringing your extension, the call will appear at the top of this queue and slide down until it reaches the end of the queue. This way calls will stack up from the bottom of the queue towards the top. When you answer a call, it will be removed from the queue and the calls above it will slide down to fill up the gap left. When you perform the Answer action, the call that has been waiting longest (i.e. the call at the bottom of the queue) is answered.

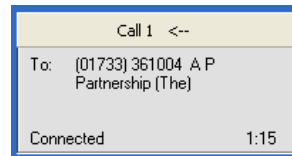


Held calls queue

This queue is next to the **Incoming calls** queue. It contains all the calls that have been answered and then put on hold. To retrieve a held call, either click on the call in the queue or use the **Cycle Calls** key (see the next section for more information).

Call appearance

The two rectangles just above the **Call control** buttons. Here is where the currently active call and the current call that is on hold pending transfer will appear. When a call is answered it will move from the **Incoming calls** queue into the left hand call appearance (**Call 1**). When you put a call on hold pending transfer and start a consultation call, the consultation call will appear in the right hand call appearance (**Call 2**).



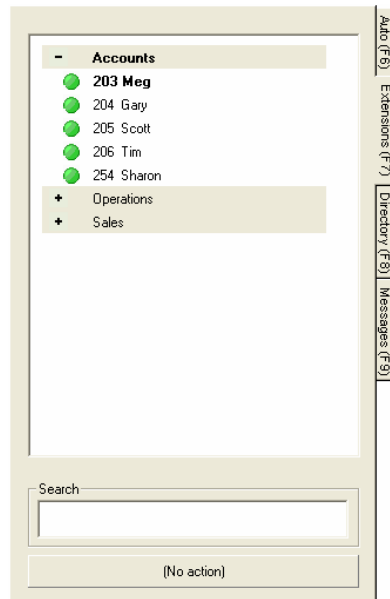
Extensions list

This is the second page of the tabulated area on the right of your workspace. The list is made up of departments which you can collapse/expand by clicking the department name, and extensions.

Each extension shows the number of the extension, the name of the extension, and their status (a green lamp means on hook, red means off hook, flashing red means ringing, and yellow means unavailable). If the extension number and name is in **bold** text, it means the extension is running a SmartServer client such as SmartPhone or SmartOperator.

You can click an extension in the list to bring up a context menu that enables you to perform different actions depending on the status of your own extension:

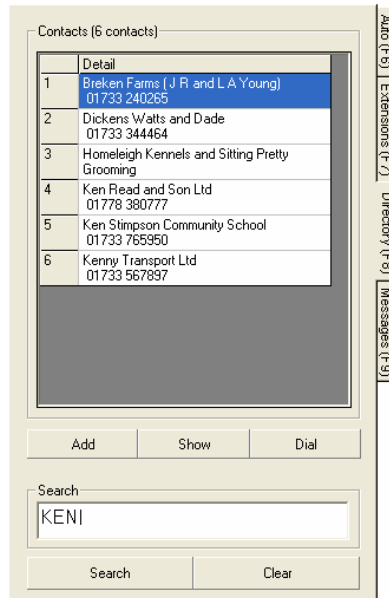
If you are on a call you can perform an announced or blind transfer to the extension. If you are not on a call, you can ring the extension. You can also view an extension's call history, send them a SmartPhone text message, set a SmartPhone call back on them, or edit their details whether you are on a call or not (these features are only available for users with the relevant security settings).



You can quickly access the **Extensions list** by pressing the **F7** key on your keyboard.

Contacts directory

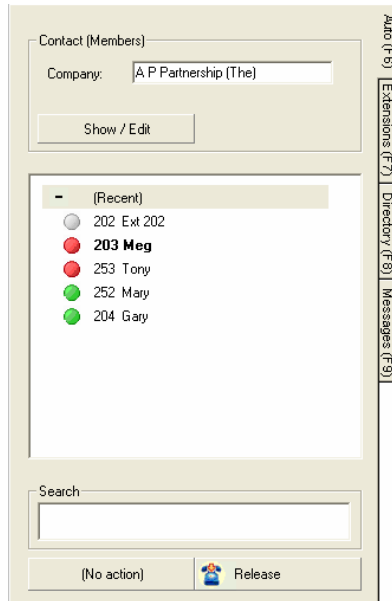
This area can be accessed from the third page of the tabulated area on the right of the workspace. From it you can view and dial contacts from address books in SmartServer. You can access this area by pressing **F8** on your keyboard.



To add a contact, click the **Add** button. To view extra details about a contact, such as their address and call history, highlight them and click the **Show** button. To delete a contact, first show them using the **Show** button and then click the **Delete** button. To ring a contact, highlight them and then click the **Dial** button. For information on searching for contacts, see below under the heading **Search panel**.

Auto-display

When you are on a call to an extension or contact, the first page of the tabulated area on the right of your workspace will display further useful information about the contact such as their full name and company, notes, and the statuses of the five extensions they last spoke to. Get to the **Auto** page by pressing the **F6** key on your keyboard.



Message folders

Use the third page of the tabulated area on the right of the workspace to view SmartPhone text messages and Callbacks. Press **F9** on your keyboard to access this area.

Select a folder from the **Folder** dropdown list to display the items in that folder. **Inbox** contains SmartPhone text messages that you have received. **Outbox** contains SmartPhone text messages that you have sent but have not yet been received (usually because the extension you sent them to has not logged in to SmartServer since you sent the message). The **Sent items** folder contains SmartPhone text messages that have been sent from you and received by the person you sent them to. The **Callbacks** table contains the internal SmartPhone callbacks that you have set on extensions. The **External callbacks** table contains the External Callbacks that you have set on contacts.

To view a message or callback, select it from the grid and click **Show**. To delete a message or callback, click the **Delete** button. You can also reply to the sender of a message by clicking the **Reply** button.

When you receive a new SmartPhone text message with SmartOperator running, you will be automatically taken to the Messages page and the message will be shown.

Search panel

This area appears at the bottom of the tabulated area to the right of your workspace. Any numbers you enter on your numeric keypad will be entered into this area even if SmartOperator is minimized.

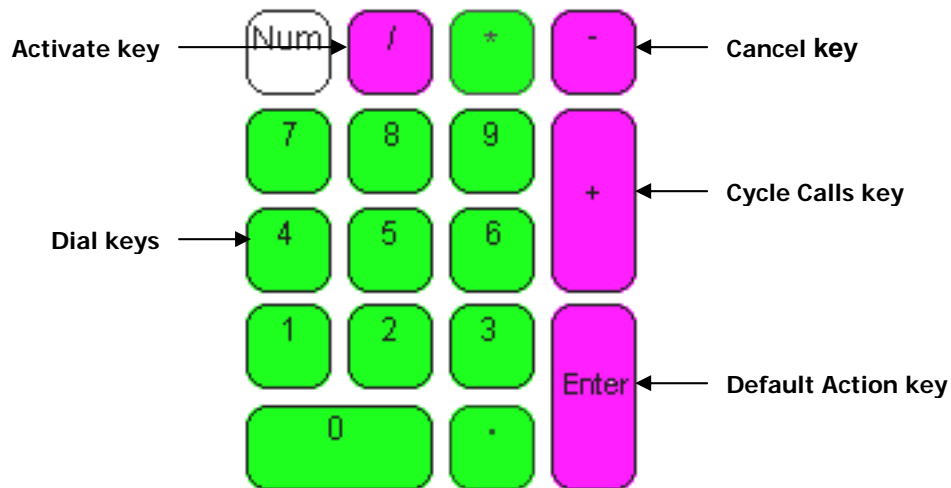
To dial a phone number, enter it and it will appear in the text box. The action button underneath the text box will change to Dial and clicking the button or pressing the default action key (see the next section) will dial that number (putting the active call on hold if necessary).

When you start to enter a number, the **Extensions list** and **Contacts directory** are automatically searched. So if you enter **20**, the Extensions list will display all extensions that contain the number **20** in them. For example **200**, **201**, **520**, **7920**, etc. The **Contacts directory** will also update to show all contacts that have **20** in any of their details, for example their telephone number, their name, their address, etc.

You can also enter **M** or **A** after an extension number to call that extension's Mobile or Assistant.

Controlling SmartOperator with Your Keyboard

Most of the keys you will use to make SmartOperator perform actions are found on the numeric keypad, which is the bunch of keys located to the right of your keyboard. The diagram below shows what each key does.



The Activate key

When you have a queue panel on your workspace that is configured to pop on an incoming call, whenever a call comes into that queue, SmartOperator will maximize and become the foreground window so that you can see who is calling and take the call if necessary. If SmartOperator is minimized and you want it to pop up, rather than waiting for a call to come in or using your mouse, you can make it appear by pressing the / key on your numeric keypad.

To activate a minimized SmartOperator using your mouse, click on the **SmartOperator** item in your Windows Taskbar (the area between the **Start** button and the clock).

The Dial keys

You may call a telephone number by entering the number to be dialed using the dial keys on your numeric keypad and pressing **Enter**. SmartOperator will then dial the number entered. To dial a "#", use the "." key. If you are already on a call and you make a new one, SmartOperator will put the current call on hold before dialing.

There is no way to manually dial numbers using your mouse, however you can dial a contact from the **Address Book** panel or an extension from the **Extension List** panel with your mouse.

The Cancel key

When you press the - key, the current action will be cancelled. If you were transferring a call, the transfer will be cancelled and the original call returned to you. If you are speaking to somebody on a call, pressing - will end the call. If you had entered some text into the **Search** panel, pressing - will clear the text.

To cancel a call with your mouse, you would click the **Search** panel's **Cancel** button. You could also click this button to clear text in the **Search** panel text box with your mouse.

The Cycle Calls key

This key is used to cycle between all the calls in the queues that you have on your workspace so that you can quickly decide whom to speak to next. To cycle through calls, press + once and a number will appear in the bottom-right corner of every call in every queue. This number represents how many additional presses of the + key are required to connect that call to you, for instance if the call you wish to be connected to you has a 3 in the bottom-right corner, you need to press the + key three more times. With every press of the + key, the highlighting border around the active call will move to another call to show you which call is about to become active. You can use the highlighting border as a visual indicator instead of trying to remember how many times you have pressed the + key.

To use your mouse to change the active call, just click on the call while it is in the queue.

The Default Action key

Pressing this key will make SmartOperator perform whatever action is being displayed on the left hand button of the **Search** panel. For instance, if your phone is ringing, the **Search** button text will display **Answer** and pressing **Enter** will answer the call. The text may also say **Search** if you have entered text to search for in the text box, or **Dial** if you have entered a number in the text box.

Use your mouse to click the button on the **Search** panel if you don't want to use your keyboard.

To be reminded of which keys do what when you are using SmartOperator, click the **Keys** button at the top of the SmartOperator window.