

SmartOperator

Quick-Start Guide

OAK-OPQ-03
SmartOperator Quick-Start - Oak

SmartOperator Quick-Start Guide

This guide will show you quickly and simply how to get started using your new SmartOperator software. Even after you have read this guide, you might still want to keep it handy for future reference. For a more in depth review of the software, you should read the SmartOperator User Documentation.

Loading up SmartOperator

Your SmartOperator software will automatically load when you turn on your computer. If, for any reason you need to close SmartOperator or your administrator has disabled the auto-start feature; you can use the following steps to load it up:

- 1) Click the **Start** button at the bottom-left corner of your screen.
- 2) Point your mouse at the **Programs** item, which appears when you click **Start**.
- 3) Point your mouse at the **SmartOperator** item, which now appears.
- 4) Click on the **SmartOperator** item.



Logging In


If you have never used SmartOperator on this computer before, a screen may appear asking you to enter your telephone extension number (and password if supplied). If you check the box that says **Auto login**, you will not be prompted to give your extension number on this computer again.

 A screenshot of the 'SmartOperator Login' dialog box. It has a title bar with the text 'SmartOperator Login'. There are two input fields: 'Extension:' with the value '504' and 'Password:'. To the right of each field is a button: 'OK' for the extension field and 'Cancel' for the password field. Below the password field is a checkbox labeled 'Auto login' which is currently unchecked.

NB: If you ever forget your password, you will have to ask an administrator to change it before you can successfully log in.

The SmartOperator Status Indicator

When SmartOperator has loaded, an icon will appear in the system tray area (i.e. near the clock at the bottom-right of your screen). This icon is a circle and will be one of five colors depending on the state of your extension:

Green:	Your telephone is on the hook.	
Red:	Your telephone is off the hook.	
Flashing Red:	Your telephone is ringing.	
Yellow:	Your telephone is in Do Not Disturb or Forward All Calls mode.	
Grey:	Status unknown (This won't happen often. If it does, simply lift and replace the receiver of your telephone and the icon will go green.)	

The SmartOperator Workspace

Your SmartOperator window is made up of eleven areas:

SmartOperator Control Buttons – the four buttons along the top that control SmartOperator's behavior.

Call Control Buttons – the four buttons near the bottom that perform call control.

Incoming Calls Queue – the area showing all the incoming unanswered calls.

Operator Calls Queue – incoming unanswered calls that rang the operator direct.

Held Calls Queue – calls that have been answered and then put on hold.

Call Appearance – area underneath the two queues that shows your active call(s).

Extensions List – tab lists all the extensions in your company so you can see who is free.

Contacts Directory – a searchable Address Book tab.

Auto-display – this tab shows you details on the contact you are talking to, including whom they last spoke with.

Message Folders – to read SmartPhone text messages.

Search Panel – for dialing/searching for contacts/extensions.

Incoming Call Queue

Whenever an incoming call arrives, it will appear at the top of this queue showing the name and number of the caller (if known) as well as who they are calling. If you see a call in this queue that you wish to answer before you take any more calls, just click on the call when you have no active calls at your extension and the caller will be transferred directly to your phone so you may answer their call. If you just wish to answer the call that is next in the queue (i.e. at the bottom), just press the **Next Call** key on your keyboard and the call will be answered by your extension. Whenever a call leaves the queue (e.g. hangs up or is answered), all the calls above it will slide down to fill its place.



Extensions

This tab displays all of your companies extensions grouped into their relevant departments. You can see at a glance whether someone is free or busy by looking at the status of the little colored circle next to his or her extension number. If the lamp is green, it means they are free. If the lamp is red, it means they are on the phone (or their phone is ringing).



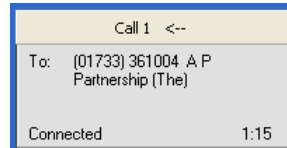
If your company also has SmartPhone users, you can see if someone is currently using SmartPhone or SmartOperator by whether or not their number/name appears in a **bold** font.

If you have a mouse, you can rest it over one of the extensions whose lamp is red and a ToolTip will appear telling you who they are on the phone to.

Clicking on a department header button will toggle the viewing of extensions in that department.

Call Appearance

This area is made up of two boxes representing the active calls at your extension. The left hand box (Call 1) displays information on the call that you answered/made, and the right hand box (Call 2) displays information on any consultation call that you have made.



The active call (the one you are speaking to) is represented by a colored border around the box.

When a call is active, you may dial digits by entering them with your keyboard's numeric keypad and pressing **Enter**.

Search

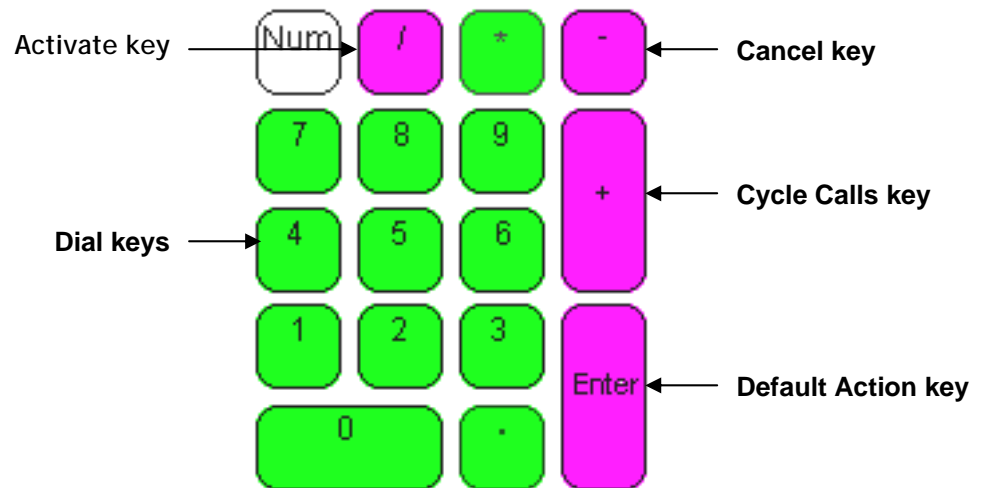
If somebody phones and wants to talk to, for example, Ann, you may type Ann at your keyboard and the Extensions area will change to only display those extensions whose name starts with "Ann" – for example: Anne, Anna, Annabelle, etc. But it will also show all extensions who contain the word "Ann" somewhere in their name – for example: Joanne, Joanna, Mary-Ann, Hannah, Suzanne, Mr. Mann, etc. Then you can quickly and easily find out which Ann it is that the customer wishes to speak with, and whether or not they are free.

As well as searching for names, you can also search for a number or part of a number.

You can also type a telephone number into the search box, and then press the **Enter** key, or click **Dial** to dial that number – this also works if you already have an active call and for instance need to dial a code such as a voicemail box number, or are choosing from a menu item on a phone call.

Shortcut Keys

When using SmartOperator, the numeric keypad on the right of your keyboard has a special use. The keys on it can be used to quickly perform some common SmartOperator tasks. These are detailed below:



Activate key

Whenever SmartOperator is loaded, even if it is not the active window, pressing this key will "pop" SmartOperator, bringing it to the foreground.

Dial keys

At any time, you may dial a telephone number using the dial keys and then hit **Enter** and SmartOperator will start a new call to the number you dialed. To dial a #, you press the "." key.

Cancel key

This key cancels whatever action is currently being performed by SmartOperator, for instance if you are transferring a call, pressing Cancel will quit the transfer and return you to the caller. If you are on a call, pressing Cancel will end the call. If there is text in the Search box, pressing Cancel will clear the text.

Cycle Calls key

When you have a number of calls held, you can use this key to cycle between them, talking to each person in turn. Pressing the key once brings up a number in the bottom right of each call appearance. The numbers represent the number of additional cycles required to make that call active. E.g. if the call you want to be active has a number 3, pressing the Cycle Calls key three times will activate that call.

Default Action key

Pressing this will make SmartOperator perform whatever verb is shown on the button underneath the Search box e.g. Dial, Answer, or Cancel etc.