

# OMNI PORTAL DRAG AND DROP

View an onscreen extension panel to monitor your phone network users, and use your mouse to dial, answer, and transfer calls.

## GET STARTED

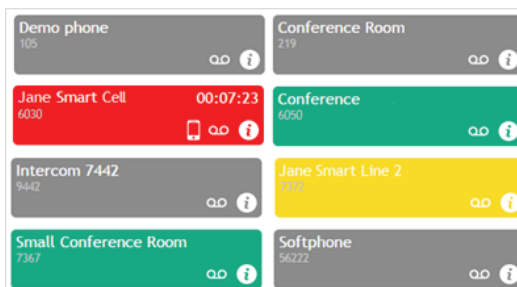
1. Log into the OMNI Panel using your username and password.
2. Click the **Manage Enterprises** link under the Enterprises header.
3. Type your enterprise name into the search bar, then click the arrow to access your panel when it appears.  
**NOTE:** Do not click an automatically populated enterprise name, as this will take you to the Edit Enterprise section of the OMNI Portal. When searching for your enterprise, click the **Search** key instead.
4. In the Enterprise Panel, click the **Extensions** link.
5. Type the name or number of the extension you would like to access into the Search text field, and click the arrow when it appears to access this extension's user panel.
6. Press the keypad icon to launch the console.

## Enterprise Information

Each extension in your enterprise network will appear in its own graphic, which displays:

- The extension number
- The user name
- The call status and any current call times
- A mobile phone icon if the extension is registered to a cellular phone
- Clickable information and voicemail icons.

Scroll through the screen to view your **Extensions**, **Groups**, **Queues**, and **Conference** options.



## By using your mouse, you can:

- Click the **phone** icon to dial an extension or a number typed into the search bar.
- End the call by clicking the **red** hang up arrow.
- Drag the call to another extension for a blind or attended **transfer**.\*
- Click the **information** icon to view extension details.
- Click the **calls** dropdown menu to view recent extension calls.
- Click the **gear** icon to customize console settings.

\* A blind transfer (**B**) automatically forwards the call to, while an attended transfer (**A**) requires you to announce the caller to the user receiving or denying the call.

## Understanding the EXTENSION COLORS:

**Green:** The extension is registered and available.

**Red:** This extension user is currently on a call.

**Yellow:** This extension phone is receiving an inbound call and ringing.

**Grey:** The extension is not registered, **or** the associated phone is not plugged in.

**NOTE:** Touch mode Drag and Drop can be used on freestanding touch screen monitors, computers and laptops with touch screens, and tablets.

## Omni Portal Drag and Drop

### To make a call:

- Type the name, extension, or external number into the search field and click the **phone** icon.  
**OR**
- Click the extension you'd like to call, then click the **phone** icon when the extension number appears in the search field.  
**OR**
- Click the **calls** dropdown to select an recent extension, then click the **phone**.

Answer your own phone when it rings. This sends the call to the contact you've selected.

### To transfer a call:

1. Use the Attended Transfer (A) icon to drag the current call to the extension you'd like to transfer to or type the name into the search field until the desired extension appears.
2. Speak with the user on the selected extension when the icon turns **red**. You will see 3 phone numbers.
3. If the call is accepted, hang up.

**OR**

1. Use the Blind Transfer (B) icon to automatically transfer.
2. Hang up when the user the call has been transferred to answers.

### To send a call to voicemail:

Press the **voicemail** icon on the desired extension to connect directly to the user's voicemail box.

**OR**

Press the **voicemail** icon on the desired extension during an existing call. When the extension appears with two stars (\*\*) in the search field, click the **blind transfer (B)** icon to send the call directly to the voicemail box.

Hang up when the extension number disappears from the search field. The call has been transferred.

### To view extension information:

Click the **information (i)** icon to open an interactive pane and view:

- Extension number & Name
- DID number
- Voicemail code
- Extension in Use
- Call Length

Click the **email** link to send a message to the user.

### To search for an enterprise extension:

Begin typing an extension number or username into the **search** field.

The field will automatically suggest a list of names and extension numbers in the network.

### To customize your panel and keep unneeded extensions out:

1. Select the **gear** icon to customize the displayed extensions.
2. Sort extensions by **Number, First Name, or Last Name**.
3. Select or deselect the box next to each contact on the **Extensions** list to choose which are displayed.