

Omni Portal Drag and Drop Manual

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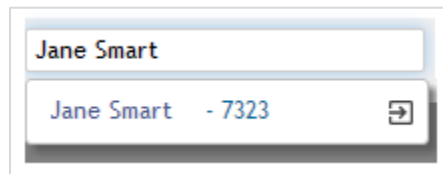
GETTING STARTED:

1. Log in to the panel with your username and password.



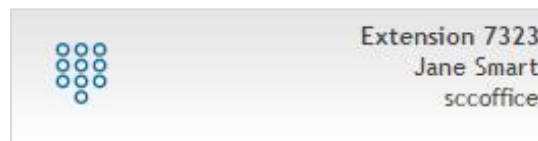
A login form with two input fields. The first field is labeled "Username *" and the second is labeled "Password *". Both fields are highlighted in yellow.

2. Search for your extension in the search field.
Press the right arrow square to launch the panel.



A search field containing the text "Jane Smart". Below the search field is a dropdown menu with one item: "Jane Smart - 7323" followed by a right arrow icon.

3. Press the keypad icon to launch the console.



A keypad icon consisting of a 3x3 grid of blue circles. To the right of the keypad icon, the text reads: "Extension 7323", "Jane Smart", and "sccoffice".

CONSOLE VIEW

Each extension icon on the console screen represents a registered network user. The name, number, call status and current call time are displayed. Scroll through the screen to view **Extensions, Groups, Queues and Conference** options.

📞
⬇️
🔄
🔄
calls ▾
⚙️

Extensions 1

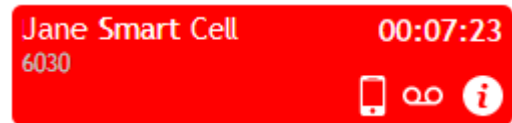
John Smart 7384 📞 ⓘ	Jane Smart 7341 📞 ⓘ	Demo phone 105 📞 ⓘ	Conference Room 219 📞 ⓘ
Intercom 7442 9442 📞 ⓘ	John Smart Cordless 7881 📞 ⓘ	Jane Smart Cell 6030 00:07:23 📞 ⓘ	Conference 6050 📞 ⓘ
John Smart Cell 6009 📞 ⓘ	Cordless 7385 📞 ⓘ	Intercom 7442 9442 📞 ⓘ	Jane Smart Line 2 7372 📞 ⓘ
Tech 7306 📞 ⓘ	test 99996 📞 ⓘ	Small Conference Room 7367 📞 ⓘ	Softphone 56222 📞 ⓘ

CALL STATUS GUIDE

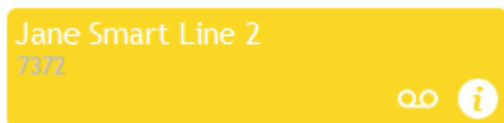
Green: The extension is registered and available.



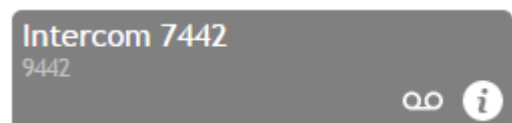
Red: The extension is on a call.



Yellow: The extension is currently ringing.



Grey: The extension is not registered or plugged in.



CONSOLE ICONS AND FUNCTIONS



CALL

Click to call an extension or external number.



HANG UP

Click to hang up a call.



BLIND TRANSFER

Drag for a **blind** transfer.



ATTENDED TRANSFER

Drag for an **attended** transfer.



GEAR

Click to customize console settings.



CALL PARK

Click the icon next to parked call you'd like to answer.

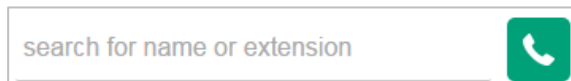


CALLS

Click to view a dropdown list of recent calls.

Search Field

Type to search for extensions or input external numbers. The field will also display extension and voicemail numbers when user icons are clicked.



Call Field

View the number you are calling.



USER EXTENSION ICONS



MOBILE PHONE

The extension is used by a mobile phone.



VOICEMAIL

Connect to a user's voicemail box.



INFORMATION

Open an onscreen pane for extended details and functions.

TOUCH SCREEN COMPATIBILITY

Drag and Drop is even faster on a touch screen. Instead of using a computer mouse, click or drag icons using your fingers. Compatible touch screen devices*, include:

- Freestanding touch screen monitors
- Computers and laptops with touch screens
- *Surface* and other tablets

**When using a touch screen, Drag and Drop functions work best in the Internet Explorer browser.*

CONSOLE CUSTOMIZATION

To keep the console screen free of unneeded extensions:

1. Select the GEAR icon to customize the displayed extensions.



2. Sort extensions by Number, First Name, or Last Name.

Sort by Number First Name Last Name

3. Select or deselect the box next to each contact on the “Extensions” list to choose which are displayed.


Display

Extensions

<input type="checkbox"/>	Intercom 9308
<input checked="" type="checkbox"/>	Intercom 7442 9442
<input type="checkbox"/>	Softphone 9887

SEARCH FOR AN 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.

Smart 

Jane Smart 7323

John Smart 7384

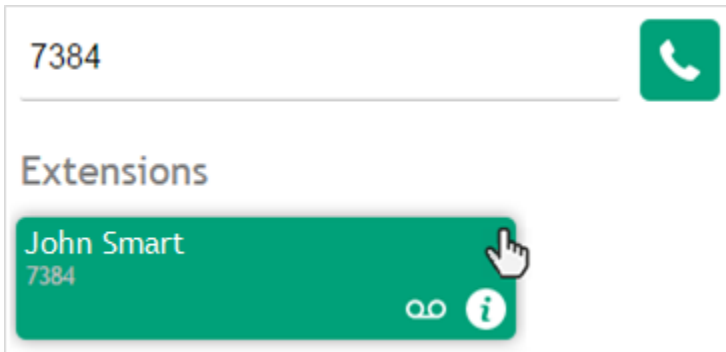
MAKE A CALL

1. Choose one of four simple ways to place a call:

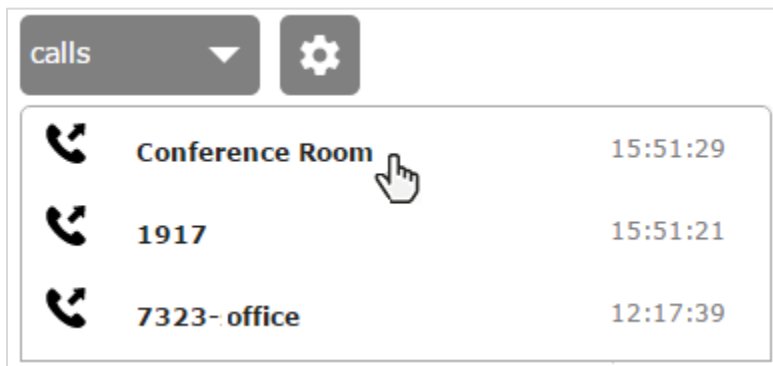
- Type the name, extension, or external number into the search field and click the **CALL** icon.



- Click the extension you'd like to call, then click the **CALL** icon when the extension number appears in the search field.



- Click the **CALLS** icon to see recent calls, and click on the preferred number.



- **On a Touch Screen:** Double tap an extension icon to start the call.

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

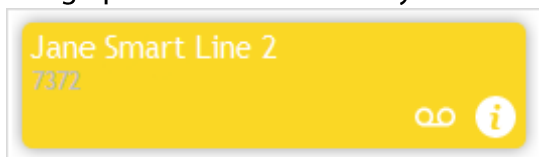
TRANSFER A CALL

BLIND TRANSFER (INSTANT TRANSFER):

1. Use the **BLIND TRANSFER** icon to drag the current call to the extension you'd like to transfer to.

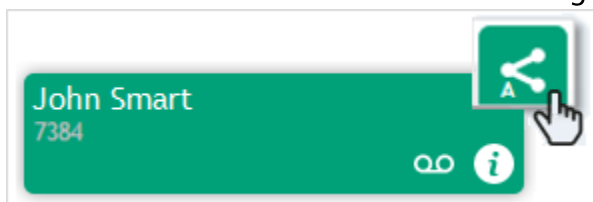


2. Hang up when the extension you've transferred to turns yellow.



ATTENDED TRANSFER:

1. Use the **ATTENDED TRANSFER** icon to drag the current call to the extension you'd like to transfer to.



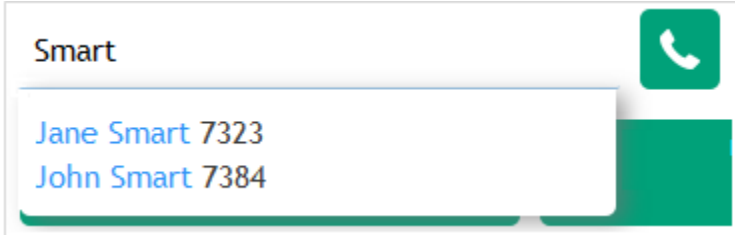
2. Speak with the user on the selected extension when the icon turns red. You will see 3 phone numbers.



3. If the call is accepted, hang up.

TRANSFER BY USERNAME

1. During a call, type into the search field until the preferred extension number appears.



2. Simply tap the **BLIND TRANSFER** icon for to transfer.



Or

Tap the **ATTENDED TRANSFER** icon. You will be put on hold, and may hang up when the new extension answers to complete the transfer.



STRAIGHT TO VOICEMAIL

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



TRANSFER AN EXISTING CALL TO VOICEMAIL:

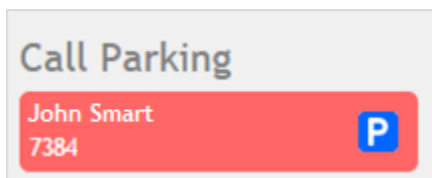
1. Press the **VOICEMAIL** icon on the preferred extension. When the extension appears with two stars (**) in the search field, click the **BLIND TRANSFER** icon to send the call directly to the voicemail box (*do not drag.*)



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

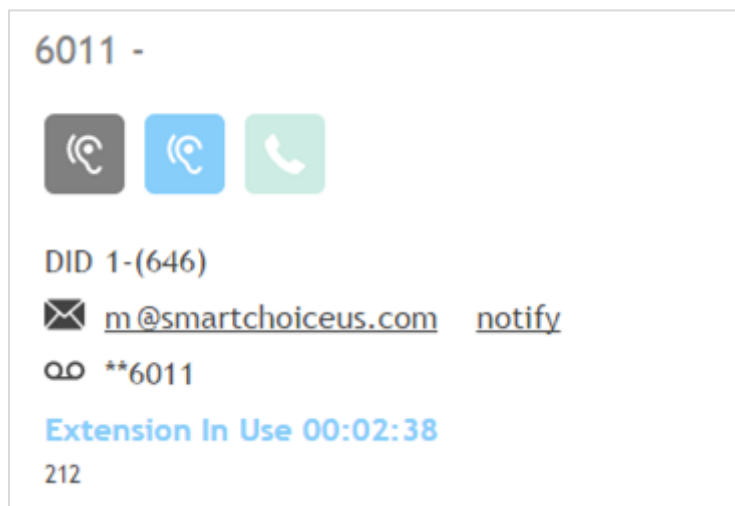
ANSWER A PARKED CALL

Click the **CALL PARK** icon next to the parked call you would like to answer.



INFORMATION PANE

Click an extension **INFORMATION** icon to open an interactive pane.



FUNCTIONS:

EMAIL hyperlink

Send a message the extension's user.

NOTIFY hyperlink

Inform the user of a missed call.

Listed information:

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

SPY AND WHISPER

System administrators may set "Spy" and "Whisper" capabilities.



To silently listen to a call (SPY):

1. Click the information icon on the active call.
2. Click the dark grey **SPY** icon.



To speak to another extension without disturbing the caller (WHISPER):

1. Click the information icon on the active call.
2. Click the blue **WHISPER** icon.