



AT&T Voice DNA Receptionist

User Guide



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About Receptionist

If you're a front-office receptionist or phone attendant for your organization, you can use the AT&T Voice DNA® Receptionist application to monitor and manage users' calls. Receptionist remotely controls your IP phone that uses AT&T Voice DNA.

Your Administrator controls your permission to use Receptionist.

Note: Receptionist calls company users "contacts."

To get started, you launch Receptionist from your AT&T Voice DNA User Dashboard. After you sign in, the Receptionist workspace appears. From the Receptionist workspace, you can:

- Monitor the line status of selected contacts.
- Answer calls for yourself and contacts.
- Hold calls.
- Drag and drop call transfers.
- Place calls directly or from contacts, call history, and speed dial codes.
- Search the company directory easily.
- Create and manage conference calls.
- And much more.



Start Receptionist

The first time you want to use Receptionist, you must start it from the AT&T Voice DNA User Dashboard. After you log in to Receptionist the first time, we recommend that you bookmark the login page. Then, whenever you want to start a Receptionist session, you can access the login page through the bookmark instead of the dashboard. You must log in to each new session.

Use Receptionist the First Time

1. Open the AT&T Voice DNA User Dashboard. Click **SETTINGS**, and then click **Misc.** immediately below.

The screenshot shows the AT&T Voice DNA User Dashboard. The navigation bar includes 'HOME', 'LOGS', 'DIRECTORY', 'SETTINGS', and 'PROFILE'. Below the navigation bar, there are links for 'Virtual Office', 'Locate Me', 'Voicemail', 'Schedules', 'Call Notify', 'Priority Alert', 'Hoteling', and 'Misc.'. The 'Miscellaneous Feature Settings' page is displayed, featuring an 'Edit' button and several settings: 'Account Codes - Mandatory' (checked), 'Anonymous Call Rejection' (checked), 'Call waiting:' (with options to disable call waiting, disable tone, and music on hold), and 'VDNA External Clients:' (with links for 'Launch Receptionist Application' and 'Download the Voice DNA Assistant Software').

2. Under **VDNA External Clients**, click **Launch Receptionist Application**. The Receptionist login page appears. Before you log in, there are a few more steps to complete.



User ID:

Password:

Stay signed in

[Bookmark this page](#)

- Return to the Voice DNA User Dashboard and click **PROFILE**. The Profile Information page appears.

HOME
LOGS
DIRECTORY
SETTINGS
PROFILE

Profile Information Edit

First Name:	Jane
Last Name:	Doe
Job Title:	<i>Not specified</i>
Phone Number:	330-555-1111
Extension:	55-1111
Caller ID:	My Phone Number
Voicemail Access Number:	330-555-1112
Wireless Number:	330-555-1113
Email Address:	jd@myemail.com Edit email address
External Client Application Credentials i	
User ID:	3305551111
Password:	<input type="password" value="....."/> Send password by email
Address:	123 Any Street Anytown, OH 34567
Location:	Location1
Time Zone:	US/Eastern

- Under **External Client Application Credentials**, click **Send password by email**. When you receive the email, note the password.
- Return to the Receptionist login page. In the **User ID** field, enter your AT&T Voice DNA phone number (without dashes).
- Enter the password from the email, and then click **Sign In**.



The Receptionist workspace appears.

As we mentioned earlier, we recommend that you bookmark the Receptionist login page so you can login directly, bypassing the AT&T Voice DNA User Dashboard. You must still log in to each Receptionist session.

To bookmark the login page, from the Voice DNA User Dashboard, launch the Receptionist application, as above. On the Receptionist login page, click **Bookmark this page**.

Change your external applications password

1. Open the AT&T Voice DNA User Dashboard.
2. Click **PROFILE**.
3. Click **Edit**. The Edit Profile Information page appears.

Edit Profile Information

First Name:	Jane
Last Name:	Doe
Job Title:	<i>Not specified</i>
Phone Number:	330-555-1111
Extension:	55-1111
Caller ID:	My Phone Number
Voicemail Access Number:	330-555-1112
Wireless Number:	<input type="text"/>
Email Address:	jd@myemail.com
External Client Application Credentials i	
User ID:	3305551111
Enter New Password:	<input type="password"/>
Enter Confirm Password:	<input type="password"/>
Address:	123 Any Street Anytown, OH 34567
Location:	Location1
Time Zone:	US/Pacific ▼

4. Enter the new password, and enter it again to confirm.



5. Click **Save**.

Your new password must follow these rules:

- Can't contain your login ID.
- Can't contain your old password.
- Can't be the reverse of the old password.
- Can't be the same as the last 4 passwords.
- Must contain at least 2 numbers, 1 upper case letter, 1 lower case letter, 1 non-alphanumeric character.
- Must be at least 8 characters long.

If your new password doesn't fit this format, you receive the message "This password is not valid. Check the password requirements and retry."

Use Receptionist After the First Time

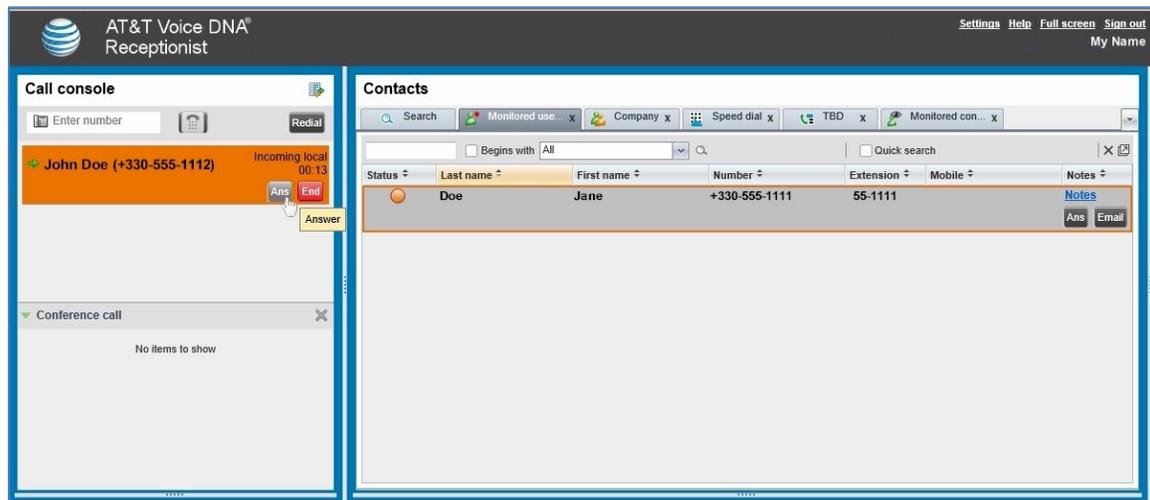
After your first Receptionist session, access the Receptionist workspace by following one of these steps:

- Use the browser bookmark to open the Receptionist login page, and then log in. The Receptionist workspace appears.
- Open the Voice DNA User Dashboard. Click **SETTINGS**, and then click **Misc.** immediately below. Under **VDNA External Clients**, launch the Receptionist application, as in **Use Receptionist the First Time**. Log in. The Receptionist workspace appears.



The Receptionist Workspace

You perform most call management and monitoring tasks on the main page of the Receptionist workspace. The workspace has several areas.



- **Logo area at top of page**—Contains links to other pages and Receptionist functions. Error, warning, and informational messages also appear here.
- **Call console**—Includes the Dialer, shows current calls, and displays any conference calls in the Conference call area.
- **Contacts pane**—Contains your contact directories, search function, and speed dial codes. Manage contacts' calls and monitor selected contacts here.
- **Settings**—Enables you to configure Receptionist. Access this page by clicking **Settings** at the top-right of the page.
- **Call History dialog box**—Enables you to view and return your past calls.

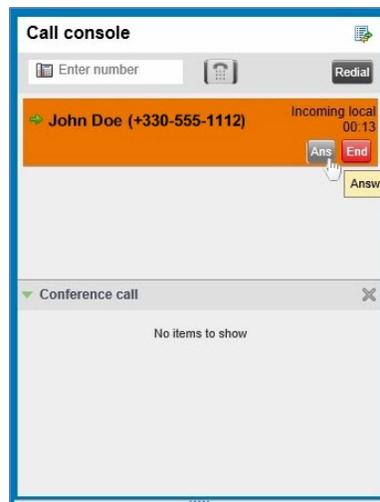


Manage Calls

You can manage calls for yourself and contacts, monitor calls, start and manage conference calls, and use call history.

Call Console

Use the Call console, at the left of the Receptionist workspace, to view and manage your current calls.



Dialer

The Dialer, at the top of the Call console, contains an **Enter Number** field and a Dial icon.



Use the Dialer to call a number by entering the number in the field instead of using a contact's entry in the Contacts pane. You can enter a full phone number or just the location prefix and extension (for example, 6-1234).

Current Calls

Current calls appear in the center of the Call console.

For each call, you can view the calling party's name and phone number (if available), the call state, and the duration of the call. You can also see how long a call has been on hold. If you're a hunt group member, you can view calls coming into the hunt group.



Conference Calls

The Conference call area, below the current calls area, shows conference calls in progress. After you start a conference call in the current calls area, the call moves to the Conference call area. See [Manage Conference Calls](#) on page 15.

Call Notification

When you have an incoming call, a pop-up message appears above the system tray in your screen's task bar (if this feature is enabled on your [Settings Plug-Ins](#) page). From this pop-up, you can answer or transfer the incoming call or send it to voicemail. See [Plug-Ins Tab](#) on page 26.

Call History

The Call history window shows missed, received, and placed calls. You can place a call from a call log number here.

Manage Current Calls

In the current calls area of the Call console, you can answer calls, put calls on and off hold, transfer calls, and more. You can call a contact from the Call console or the [Contacts](#) pane.

View Current Calls

Your current calls are always visible in the Call console.

You can view conference call details. In the Conference call area, click the Expand icon .

If the Call Notification feature is enabled, a notification window above your task bar's system tray shows the caller's name and number.

The call state of each call shown is indicated by an icon:



Incoming call



Active call



Held call



Outgoing call



Place, Hold, Resume, and End Calls

You can place a call from the Current Calls area or from the Contacts pane. You can hold, resume, and end calls from the Current Calls area.

Call a contact

1. In the Contacts pane, do one of the following:
 - Click **Monitored Users** or **Company**, and then locate your contact.
 - Click **Search** and search for your contact in both directories.
2. Click the contact's name to expand the entry.
3. Click **Call**.

For details, see Use the Contacts Pane on page [18](#).

Directly dial a number

1. On the Call console, enter the number or extension in the Dialer.
2. Click the Dial icon .

Call from call history

1. At the top-right of the Call console, click the Call History icon . The Call history dialog box appears, with a log of past calls.
2. From the **Show** list, select **Missed Calls**, **Received Calls**, or **Dialed Calls**. (By default, **Missed Calls** is selected.)
3. To find the number you want to call, scroll through the list that appears.
4. Click the entry to expand it, and then click **Call**.
5. To close the Call History dialog box, click **OK**.



Name	Number	Date/Time	Redirection num	Redirection type
	+13306661112	2014-09-22, 10:14:01	3306661133	Call forward always
	+13306661132	2014-09-16, 18:00:00	3306661133	Call forward always
	+13306661112	2014-09-21, 09:15:23	3306661133	Call forward always
	+13306661122	2014-09-22, 09:34:21	3306661133	Call forward always
	+13306661112	2014-09-22, 10:11:47	3306661133	Call forward always
	+13306661122	2014-09-22, 10:12:41	3306661133	Call forward always
	+13306661112	2014-09-22, 10:13:22	3306661133	Call forward always
	+13306661123	2014-10-02, 12:11:50	3306661143	Third party voice mail support
	+13306661123	2014-09-29, 10:05:16	3306661143	Third party voice mail support
	+13306661123	2014-10-06, 11:25:06	3306661143	Third party voice mail support

Answer a call

To answer a call, do one of these things:

- In the Call console, move your mouse over an incoming call, and then click **Ans.**
- In a Call Notification window, click anywhere in the text.
- To answer a call for a contact, see Other Call Console Functions on page 17.

Place a call on hold

- In the Call console, move your mouse over an incoming or active call, and then click **Hold.**

Note: The Hold function isn't available from a virtual office.

Resume a call

- In the Call console, move your mouse over the held call, and then click **Ans.**

Note: The Resume function isn't available from a virtual office.

End a call

- In the Call console, move your mouse over a call, and then click **End.**

Transfer Calls

The Call console offers three types of call transfers. Transfers vary according to the role you play in the call. You can also transfer calls directly to voicemail.



- Blind transfer—You transfer a call to another party silently. After you transfer, the call disappears from the Call console, but you can still monitor it in the Contacts pane.
- Supervised transfer—You transfer a call to a monitored user. As you monitor the call on the **Monitored Users** tab, if you see that the call isn't answered, you can reconnect to it.
- Transfer with consultation—You transfer a call, and when the transferred call is answered, you introduce it to the person who answers.

To learn how to transfer calls from the Contacts pane, see [Use the Contacts Pane](#) on page 18.

Blind Transfer

You can blind transfer active, held, or ringing calls. If a call is ringing, blind transfer redirects the call before you answer it. You can blind transfer a call to a number you enter in the Dialer or to a contact.

Blind transfer a call to a destination number

1. In the Call console, select a call to transfer.
2. In the Dialer, enter the destination number, and then click **Transfer**. The call is transferred and disappears from the Call console.

Blind transfer a call to a contact

1. In the Call console, select a call to transfer.
2. In the Contacts pane, locate the destination contact by doing one of the following:
 - Click **Monitored Users** or **Company**, and then locate the contact.
 - Click **Search** and search for the contact from both directories.
3. Click the destination contact's name to expand the entry.
4. Click **TXR**. The call is transferred and disappears from the Call console.

For details, see [Use the Contacts Pane](#) on page 18.

- Or, you can drag the call from the Call console and drop it onto the contact in the Contacts pane. For activation of this feature, see [General Tab](#) on page 25.

Supervised Transfer



You can transfer and supervise an active inbound call to a monitored user.

Make a supervised transfer

1. In the Call console, select a call to transfer.
2. In the Dialer, dial the number or contact to whom you want to transfer the call.
3. On the **Monitored Users** tab, if you see that the call isn't answered or the line is busy, you can reconnect to the call.
4. If you want, you can transfer the call to another number. Move the mouse over the new, non-selected call and click **Transfer**.

Transfer with Consultation

You might want to speak to the person you're transferring the call to before you transfer the call.

You can transfer active, held, or ringing calls. If you transfer a ringing call, it's redirected before you answer it.

Transfer a call with consultation

1. In the Dialer, call the destination number or contact.
2. Speak when the party you're transferring the call to answers.
3. In the Call console, select the call to transfer (an active call will be put on hold automatically).
4. Move your mouse over the new call, and then click **TXR**. The calls are connected and disappear from the Call console.

Transfer to Voicemail

You can transfer a call to a contact's voicemail or to your own voicemail. You can transfer a call that's active, held, or ringing on your phone. The contact must have a voicemail box.

Transfer a call to voicemail

1. In the Call console, select a call to transfer.
2. In the Contacts pane, locate the contact where you'll transfer the call by doing one of the following:



- Click the **Monitored Users** or **Company** tab, and then locate the contact.
 - To transfer the call to your own voicemail, locate your own contact entry.
 - Click **Search** and search for the contact from both directories.
3. Click the destination contact to expand the entry.
 4. Click **VM**. The call is transferred to the contact's (or your) voicemail and disappears from the Call console.

For details, see Use the Contacts Pane on page [18](#).

Manage Conference Calls

You can start and manage a 3-way conference call. If your Administrator activates the N-way conference calls feature for you, you can have a conference call with up to 15 participants. Start a 3-way call, and then add the additional participants

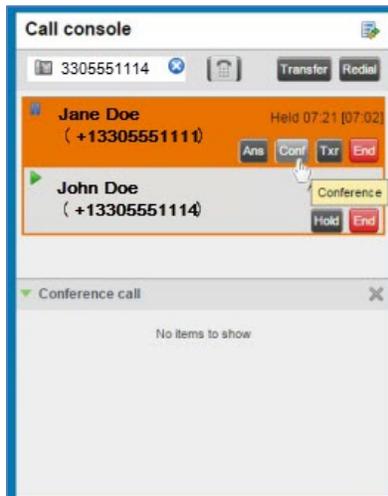
To start a conference call and add participants, use the current calls area of the Call console. To manage or end an active conference, use the Conference call panel.

You can have only one active conference at a time.

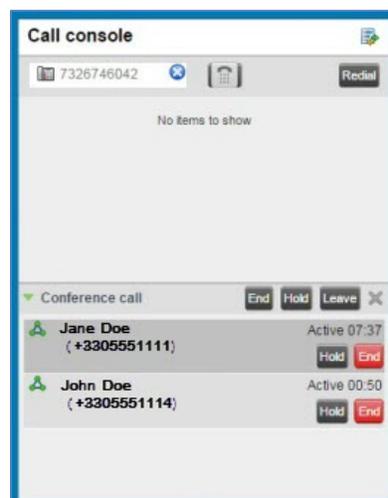
Start a conference call

To start a conference call, you need two active calls in the current calls area of the Call console. You're the third participant.

1. To establish the call with the first contact, call the contact (by any method). The call appears in the current calls area.
2. To add the second party to the call, click the first call and then move your mouse over the second call. Click **Conf**.



The calls move to the Conference call area, and the 3-way conference call is established. You can add additional participants.



Add participants to a conference call

Note: Before you can add more participants, your Administrator must assign the N-way feature to you.

1. Call the new participant (by any method). The call appears in the current calls area of the Call console.
2. Move your mouse over the call you want to add, and then click **Conf**. The call is added to the active conference and moves to the Conference call panel.

Hold a conference call



- In the Conference call bar click **Hold**. The entire conference call is put on hold.

Resume a conference call

- In the Conference call header, click **Ans**. All calls in the conference become active.

Hold or resume a specific participant's call

1. Expand the Conference call area by clicking the Expand icon .
2. Move your mouse over the participant's call. To hold the participant's call, click **Hold**. To resume the participant's call on hold, click **Ans**.

Leave a conference call

- In the Conference call area bar, click **Leave**. The other parties remain connected, but the calls disappear from the Call console.

End a conference call

- In the Conference call panel bar, click **End**. All calls are disconnected, and the calls disappear from the Call console.

Other Call Console Functions

From the Receptionist workspace, you can interrupt (barge in) on a call to establish a 3-way conference, and you can answer a call for a monitored contact.

With Directed Call Pickup, you can answer a call coming in to a monitored user.

Answer an incoming call for a monitored user

1. In the Contacts pane, locate the monitored user with the incoming call by doing one of the following:
 - Click **Monitored Users**, and then locate the monitored user.
 - Click **Search** and search for the monitored user.
2. Click the monitored user's entry to expand it.
3. Move your mouse over the monitored user and click **Ans**. The call appears in the Call console as Incoming .



Status	Last name	First name	Number	Extension	Mobile	Notes
	Doe	Jane	+13305551111	55-1111		Notes Ans Email
	Doe	John	+13305551144	55-1144		Pick-Up

Barge in on a call

You can barge in on an established call to set up a 3-way conference.

1. In the Contacts pane, locate a contact on the active call by doing one of the following:
 - Click **Monitored Users**, and then locate the contact.
 - Click **Search** and search for the contact from both directories.
2. Click the busy contact, and then click **Barge**, establishing a 3-way conference. The calls appear in the Conference call area of the Call console. You can treat the call like any conference call, except you can't add additional participants.

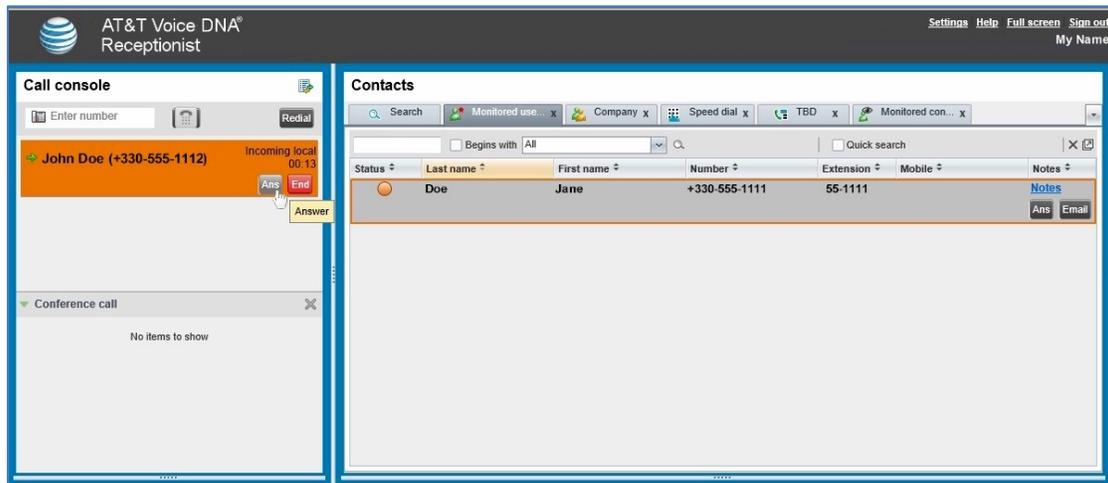
Status	Last name	First name	Number	Extension	Mobile	Notes
	Doe	Jane	+13305551111	55-1111		Notes Barge Email Barge-In

Note: A barge-in conference can have only three participants at any one time.

For details, see Use the Contacts Pane on page 18.

Use the Contacts Pane

Use the Contacts pane, on the right side of the Receptionist workspace, to call, monitor, and manage your contacts.



The Contacts pane has four active information tabs.

- **Monitored users**—A searchable list of all the users you actively monitor.
- **Company**—A searchable directory of all the users and hunt groups in your organization. This is the same as the Directory on your AT&T Voice DNA User Dashboard.
- **Search**—A feature for searching both tabs at once.
- **Speed dial**—A configurable list of speed dial codes.

Note: The inactive Pullout icon , in the Contacts pane search area, is reserved for future use.

Manage Contacts

You use the **Monitored users** tab to monitor the phone status of selected users assigned by your Administrator. Your Administrator controls which users you monitor. To view all contacts, use the **Company** tab.

View Your Directories

The **Monitored users** and **Company** lists contain this information for each contact or user:

- Call status (**Monitored users** tab only)
- First and last name
- AT&T Voice DNA phone number



- Extension
- Mobile number, if available
- Optional notes (**Monitored users** tab only)

You can customize the Contacts pane.

- You can sort entries by column. To sort by a column, click the column heading. To reverse the order, click the column heading again.
- You can show or hide tabs. To select which tabs to show, click the down arrow in the upper-right of the window.



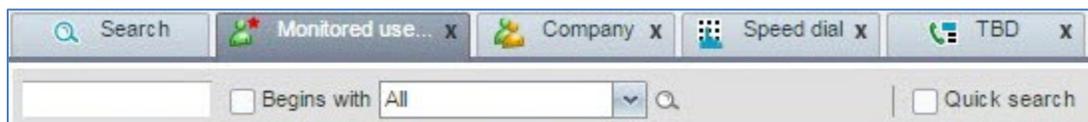
View monitored user details and use available functions

On the **Monitored users** or **Company** tab:

- Click a monitored user or contact to expand the entry.
- To call the monitored user or contact's AT&T Voice DNA number, click **Call**.
- To call the monitored user or contact's extension, click **Ext**.
- To call the monitored user or contact's mobile number (if listed), click **Mob**.
- To send the monitored user or contact an email, click **Email**.

Search for a Specific User

The search function for each tab is directly beneath the tab name. You can search for a first name, last name, or number.



Search all columns of a directory tab

1. Make sure **the Quick search** checkbox (on the right) is unchecked.
2. Click in the first search field.
3. Enter a name, number, or at least two characters of the name or number.



4. If you want, check the **Begins with** checkbox. The search returns only results that begin with the character string you entered. If you don't check **Begins with**, the search returns results that begin with the string and also results that contain the string anywhere.
5. Leave the **Begins with** selection as **All**.
6. Click the Search icon (the magnifying glass ). All the entries on the tab that meet the search criteria are displayed.
7. From the search results, click the entry you want.

Search in a specific column on a directory tab

1. On the **Monitored users** or **Company** tab, make sure the **Quick search** checkbox (at the right) is unchecked.
2. Click in the first search field.
3. Enter a name, number, or at least two characters of the name or number.
4. If you want, check the **Begins with** checkbox. The search returns only results that begin with the character string you entered. If you don't check **Begins with**, the search returns results that begin with the string and also results that contain the string anywhere.
5. From the **Begins with** drop-down list, select a column.
6. Click the Search icon . All the contacts in the selected column that meet the search criteria are displayed.
7. Select the contact you want.

Search All Directories

You can use the **Search** tab to search for a contact in all directories at once.

Search all directories

1. In the Contacts pane, click the **Search** tab.
2. Click in the first search field.
3. Enter a name, number, or at least two characters of the name or number.
4. If you want, check the **Begins with** checkbox. The search returns only results that begin with the character string you entered. If you don't check **Begins with**, the search returns results that begin with the string and also results that contain the string anywhere.



5. Click the Search icon . The text you enter is matched against all columns in both the **Monitored users** and **Company** directory tabs (except for the **Notes** column). Search results are displayed on the **Search** tab.
6. From the results, select the user or contact you want.

Call or Email a User or Contact

You can use the Contacts pane to call or email a contact.

To call a contact

1. On the **Monitored users** or **Company** tab, search for or scroll to find the user or contact.
2. Click the entry to expand it.
3. Click **Call**.

Email a contact

1. On the **Monitored users** or **Company** tab, search for or scroll to the user or contact.
2. Click the entry to expand it.
3. Click **Email**. A blank email addressed to the user or contact appears.
4. Write the email and send.

Add a Note to a Monitored User

You can provide additional information about a user in the **Notes** column.

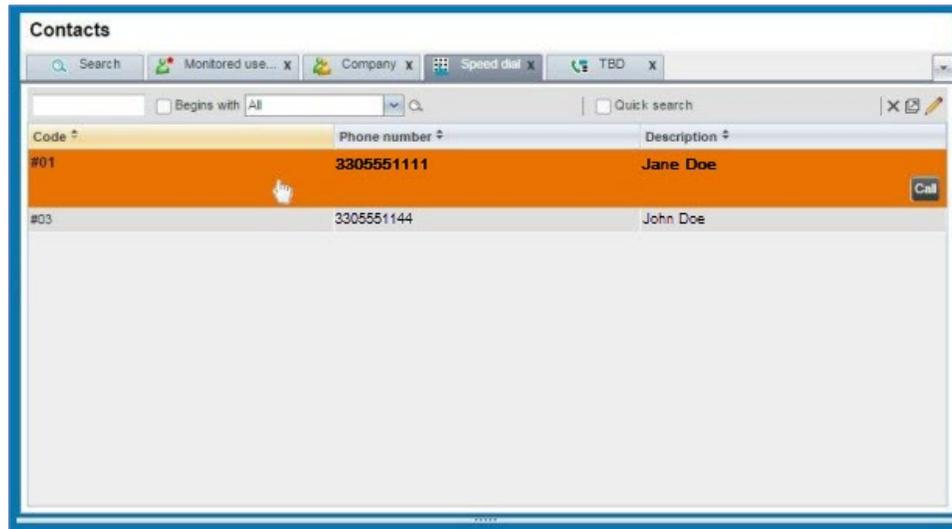
Make a note about a monitored user

1. On the **Monitored users** tab, search for or scroll to the user or contact.
2. Click the entry to expand it.
3. In the **Notes** column, click the **Notes** link for that user. The Notes dialog box appears.
4. Enter your note text. You can also view and edit previously entered notes.
5. To save your changes and close the dialog box, click **OK**. To close the dialog box without saving, click **Cancel**.

Manage Speed Dial Codes



Using the **Speed dial** tab in the Contacts pane, you can create and edit speed codes for your frequently called contacts. The speed code, phone number, and description are shown for each contact.



Add a speed dial entry

1. In the Contacts pane, click the **Speed dial** tab.
2. Click the Edit icon . The Edit Speed Dials dialog box appears.
3. Click **Add**. A new line is added below the existing entries, enabling you to define a new entry.
4. From the **Code** drop-down list on the left, select a speed dial code.
5. In the **Phone number** field, enter the phone number for this code.
6. In the **Description** field, enter a description that identifies the entry.
7. To save the entry, click anywhere in the dialog box outside the entry.

Call a speed dial entry

1. Click the speed dial entry to expand it.
2. Click **Call**.

Modify a speed dial entry

1. In the Contacts pane, click the **Speed dial** tab.
2. Click the Edit icon . The Edit Speed Dials dialog box appears.



3. Double-click the entry.
4. Edit the information.
5. To save your changes, click anywhere in the dialog box outside the entry.

Delete a speed dial code

1. In the Contacts pane, click the **Speed dial** tab.
2. Click the Edit icon . The Edit Speed Dials dialog box appears.
3. Select the entry, and then click **Delete**.



Settings and Other Links

You can customize the functionality and appearance of Receptionist.

To get started, click **Settings** in the upper-right of the Receptionist workspace, and then click the tab (**General, Services, Plug-ins, About**) that contains the settings you want to customize. The **Applications** tab is reserved for future use.

When you're finished, click **Back to application** at the upper right of any tab.

General Tab

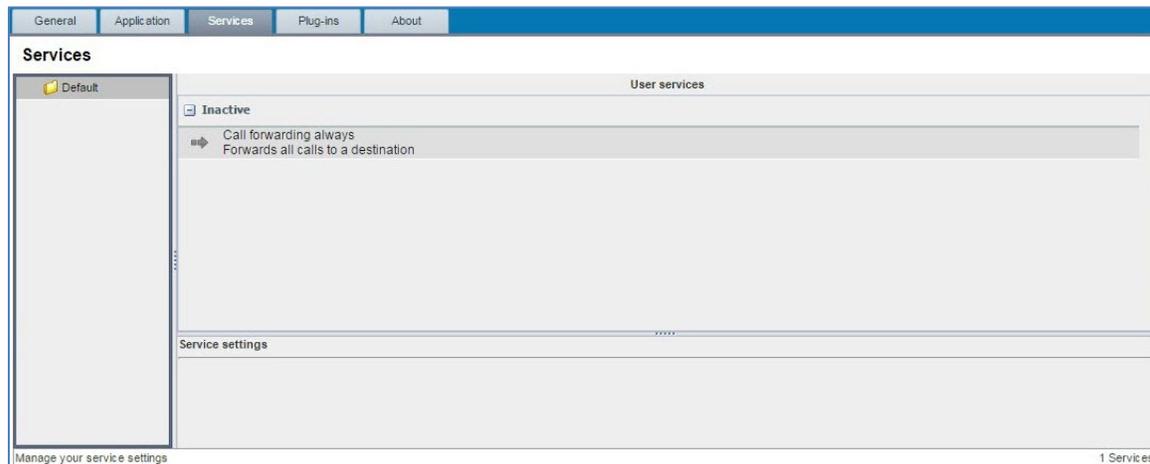
Use the **General** tab to configure miscellaneous settings that improve the usability of Receptionist.

- Select a date format for call entries.
- Select a time format.
- If you've customized the size and position of the Web browser that displays your Receptionist workspace, you can do one of the following:
 - To save your workspace configuration, click **Save workspace**.
 - To rearrange your active workspace to a previously saved configuration, click **Load workspace**.
 - To restore the original workspace configuration, click **Restore workspace**.
- If you want, check the **Always save workspace on sign out** checkbox. This means you won't have to open this page and save your workspace configuration every time you end a Receptionist session.



- Check the **Drag and drop** checkbox so that you can easily transfer a call to a contact by dragging it from the Call console and dropping it on the contact's entry in the Contacts pane. You can drag and drop a call that's ringing, answered, or held.

Services Tab

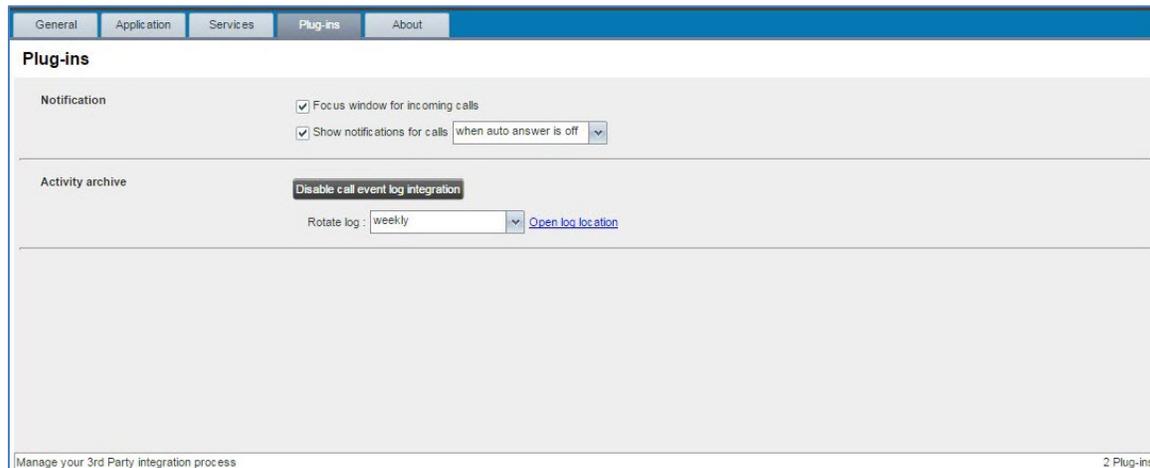


Use the **Services** tab to turn on the Call Forwarding Always feature. When you activate the Call Forwarding Always feature, your own name and number appear as the caller ID on the recipient's phone, even though the call is forwarded to another number.

Configure the Call Forwarding Always feature

1. On the **Services** tab, under **Inactive**, click **Call forwarding always**.
2. In the settings that appear, check the **Active** checkbox.
3. If you want a caller to hear a tone that indicates the call is being forwarded, check the **Ring Splash** checkbox.
4. In the **Forward to** field, enter the destination phone number.
5. Click **Save**.

Plug-ins Tab



Use the **Plug-Ins** tab to configure call notification and archiving (not available in the current release).

- **Focus window for incoming calls**—When this option is checked and the browser window running Receptionist is minimized, Receptionist automatically restores the window when calls come in.

Note: This option does not work in **Chrome**.

- **Show notifications for calls**—When this option is checked, Receptionist displays the Call Notification pop-up window on top of other applications' windows when you receive a call. Check this box, and then select an option to specify when notifications are displayed.

Note: This does not work when other tabs are open in the same Web browser window as Receptionist. Also, if calls come within eight seconds of each other, the Call Notification pop-up appears only for the first call of that series.

- **Activity archive**—This option is unavailable and reserved for future use.

About Tab

The **About** tab displays information about your version of the Receptionist application.

Other Links

Additional links are located in the upper-right of the Receptionist workspace.

- To open the AT&T Voice DNA Receptionist User Guide, click **Help**.
- To expand the Receptionist workspace to fill your entire screen, click **Full screen**. Note that you can save your workspace settings on the **General** tab.



- To end your Receptionist session, click **Sign out**. Next time you want to access Receptionist, you must enter your login credentials again.

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