



Side Panel

The **Side Panel** on the left of the application contains icons to quickly access the core functionalities of the Desktop Softphone application. The table below describes each of the **Side Panel** icons. You will notice that each icon has multiple states to indicate which function is currently displayed on the **Main Screen** area. A solid icon is used to indicate a function that is currently active (selected) – see the table below:

Side Panel icons	Normal	Selected	Description
Dialpad			Primary softphone application screen to access the numeric key pad and quick dials to make a call.
Contacts			To access corporate contacts defined in the phone system, quick dials and Office365 contacts.
Messages			To access existing text messaging session or to start a new text messaging session.
History			To access call history using the softphone, use the portal (Webtab) to access call history across all devices.
Webtab			To access the system web portal from within the softphone application.
Do Not Disturb			To enable / disable the Do Not Disturb (DND) feature on the softphone. If the DND is active, the icon will be solid red, it does not affect other devices assign to the same extension.
Settings			To access the softphone applications settings to adjust the configuration and behavior of the softphone.

Main Screen | Detail Screen

The area to the right of the side panel will either show the main screen and detail screen next to each other, or just show the main screen area if the width of the softphone application is too small to show both. If the latter case, the softphone application will toggle between the main and detail screen based on the action performed.

Generally, the main screen area will display either a numeric keypad (**Dialpad**) or a list view of the respective function, like contact list, message thread list, or call history list. The **Webtab** screen fills the space available to the right of the softphone side panel.

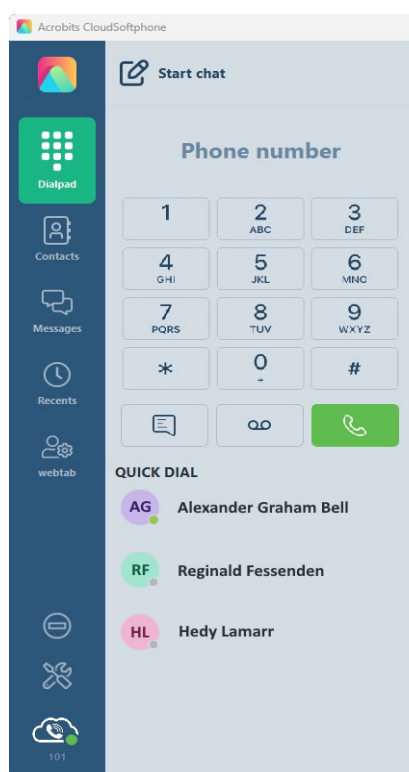
Refer to the respective section on the next page for specifics on each softphone functions to learn how to use them, an explanation of information and icons displayed of these screens.



☐ Dialpad - No Active Call

The **Dialpad** screen reveals the application's numeric keypad to make a call. Click on the number keys and then the call key {phone-key-icon}, or use the keyboard and press the Enter key, to place an outgoing call. The detail screen area will display the associated information found in the softphone **Contacts** (*refer to the Contacts section for more information*).

The **Dialpad** shown in the *Main Screen* area is split into functional sections:



To Start a Chat

Access the Messaging screen to send text messages by clicking the Messaging icon on the Side Panel or by clicking Start a Chat at the top of the Main Screen area of the **Dialpad** screen.

Numeric Keypad (Phone Number)

Enter the phone number with the keyboard and press the **Enter** key or click on the number keys using the mouse and then clicking the green **Call** button. You can also make a call by clicking on the **Quick Dial** entry you wish to dial.

Quick Dial

You can scroll down the list of Quick Dials if there are more than the screen displays, you can also find the full list of Quick Dials on the Contacts screen and choose the Quick Dials from the pull-down menu on that screen.

Active

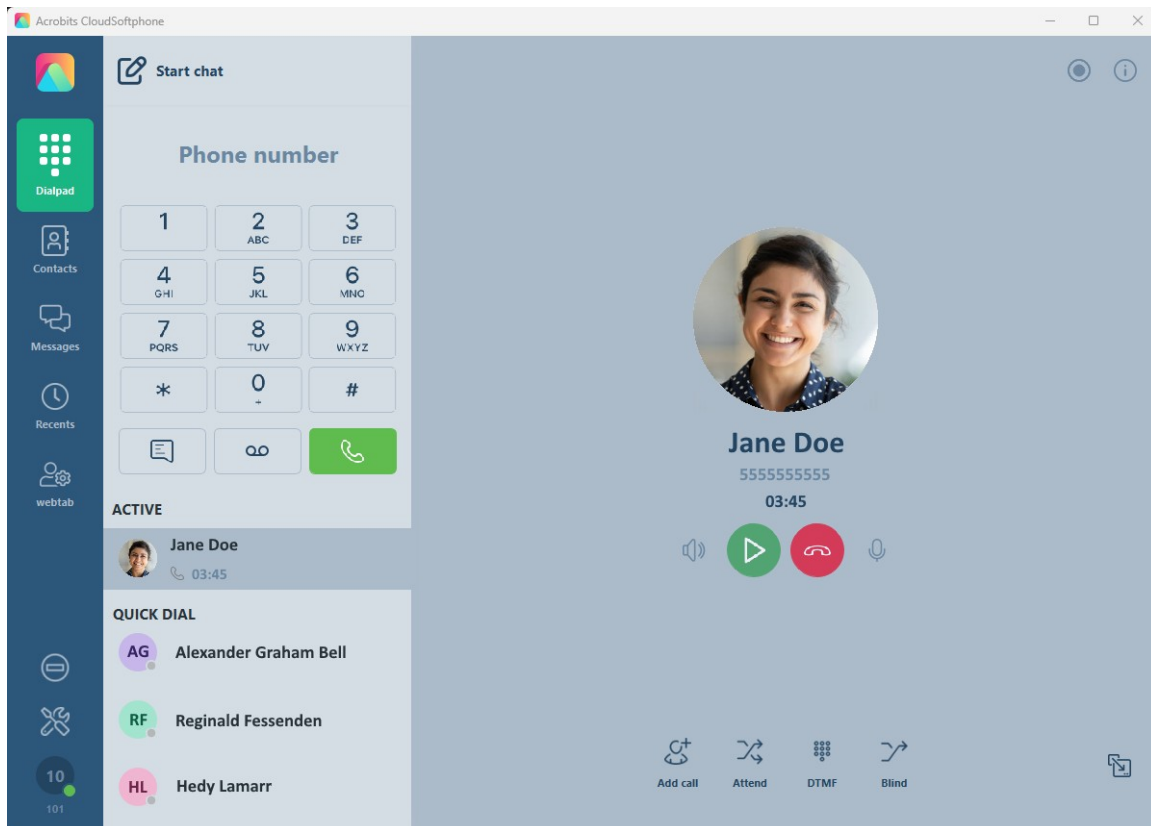
This section appears above the **Quick Dial** section during an active call in progress and displaying call information.

Button	Name	Description
	Call	To dial the number entered as entered and shown where the Phone number label is displayed.
	Voicemail	To access your voicemail box, click on the DTMF icon to have a numeric keypad displayed to navigate the voicemail menu.
	Messaging	To start messaging the phone number as entered and shown where the Phone number label is displayed. If no number is entered, nothing will happen when this button is pressed.



☰ Dialpad – Active Call

When there is a call in progress, the Detail Screen area displays useful information about the call and presents several icons to help you control the call in progress. By clicking the icons in the Detail Screen area, you can perform several actions pertaining to the call in progress – see the table below for an explanation of the available call control options:



End Call – press this button to end the active call in progress.



Hold Call – press this button to put the active call in progress on hold.



Resume Call – press this button to resume a call previously put on hold.



Speaker settings – press this icon to select the speaker device for the call in progress.



Microphone settings – press this icon to select mic device for the call in progress.



Add Call – To add another party and create a 3-way conference call.



Attend – To transfer a call by announcing the call before transferring.



DTMF – To dial phone keys while in an active call. A numeric keypad will appear below the DTMF icon.





Blind – To transfer a call automatically without announcing the call to the destination.




Pop-out – To split the Detail Screen onto a separate window.






☰ Dialpad – Active Call - Conference

During an active call, press the **Add Call** button , the label **Add Call** will be displayed above the numeric keypad. Enter the second party's extension or phone number in the **Dialpad**, then press the green **Call** button or press the Enter key. Press the **Merge** button  when the second party answers. All parties are now joined in the conference. The *Detail Screen* will show multiple avatars to represent the members of the **Conference** call and the word **Conference** will also be displayed.


☰ Dialpad – Active Call - Call Transfer – Blind

During an active call, press the **Blind** button , the current call will be placed on hold and the label **Transfer Call** will be displayed over the numeric keypad, dial the extension or the phone number you wish the transfer to call to on the **Dialpad**. Press the green **Call** button to complete the blind transfer. The *Detail Screen* area will indicate that the call is being transferred.

☰ Dialpad – Active Call - Call Transfer - Attended

During an active call, press the **Attend** button , the current call will be placed on hold and the label **Transfer Call** will be displayed over the numeric keypad. Dial the extension or the phone number you wish to transfer the call to on the **Dialpad**. Press the green **Call** button to talk to the transfer recipient and announce the call transfer. Then press the **Complete Transfer** button  to send the call through. The *Detail Screen* area will indicate that the call is being transferred. Alternatively, you can press the **Cancel** button  to abort the transfer. You can repeat the process with another transfer destination or press the **Resume** button to resume the call with the original party.

☰ Dialpad – Active Call – Enter DTMF Tones

During an active call, press the **DTMF** button  to display a numeric keypad within the *Detail Screen* area (and below the **DTMF** button) to press numbers in order to navigate an interactive voice menu or voicemail system. It is important to differentiate this numeric keypad versus the main Numeric Keypad on the *Main Screen* area, as the latter is to initiate another call and not for sending **DTMF** tones over the current call.

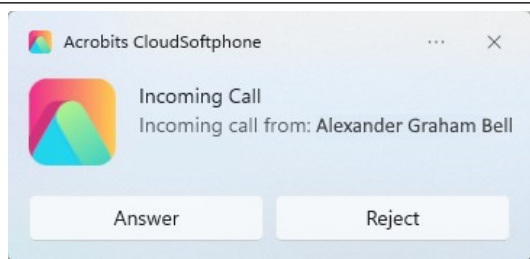


Incoming Call – Notifications

The *Desktop Softphone* application can notify you of incoming calls based on the **Incoming call alert mode** configuration in the application **Settings** under **Controls**. You have three (3) different options:

- 1. Notification and bring the application to the foreground**
In this mode, the application will be brought into the foreground when the notification window is displayed. You can control the call with either the application or notification window.
- 2. Notification only**
In this mode, only the notification will be display, use the notification windows to control the call. If the call is answered, the application will be brought to the foreground.
- 3. Disable**
*In this mode, if the application windows is not already open, you will not see any indication that a call is incoming. **It is strongly suggested not to select this option.** However if you do, we suggest you activate the **Always on top** option in the **Settings** under **Controls**.*

Below are examples of notification windows:



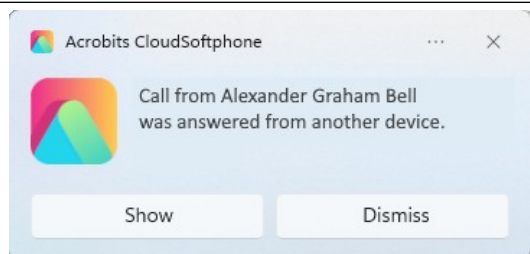
Incoming Call notification

This notification window indicates an incoming call, that you can either **Answer** or **Reject**. If the call is answered, the other device will stop ringing. However, if you reject the call, your other device (if configured with the same extension number) will continue to ring.



Missed Call notification

This notification windows indicates that an incoming call was not answered by any devices configured with the same extension number. If there is a voicemail for this extension, the call was sent to the voicemail system. You can click on the **Call Back** button to initiate an outgoing call to the caller or **Dismiss** the notification window.



Call answered from another device notification

This notification window indicates that the incoming call was answered by another device. You can **Show** the call information in the **Recents** call history section of the application or you can **Dismiss** the notification window.



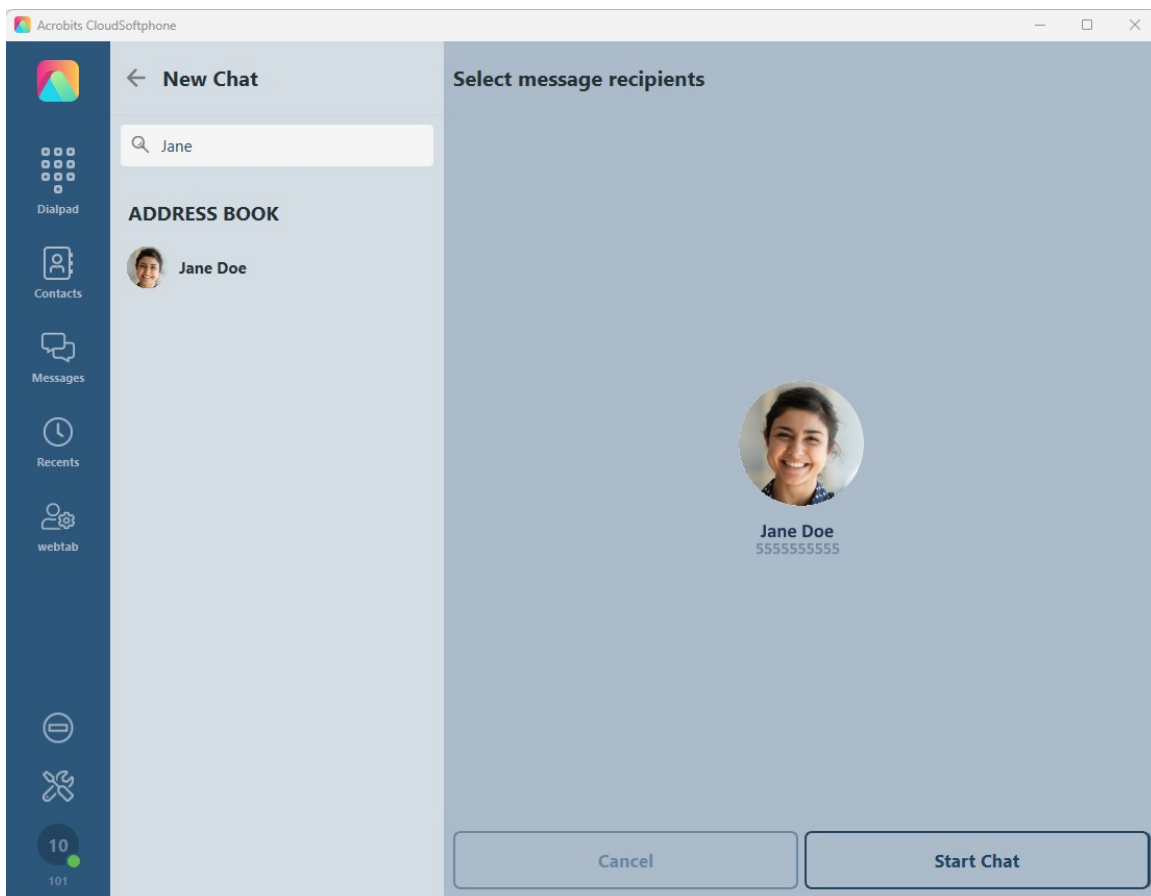
Text Messaging

Your phone system supports sending **Text Messaging** between users (extensions) of the system. The system also supports sending and receiving **SMS** messages if you have an SMS-enabled phone number assigned to your user extension. Contact your system administration to confirm if you have **SMS** texting capability or to add it to your user extension.

To access the Text Messaging function, you can choose it from the Side Panel or click on **Start chat** above the numeric keypad on the **Dialpad** Screen.



Messaging - Start Chat

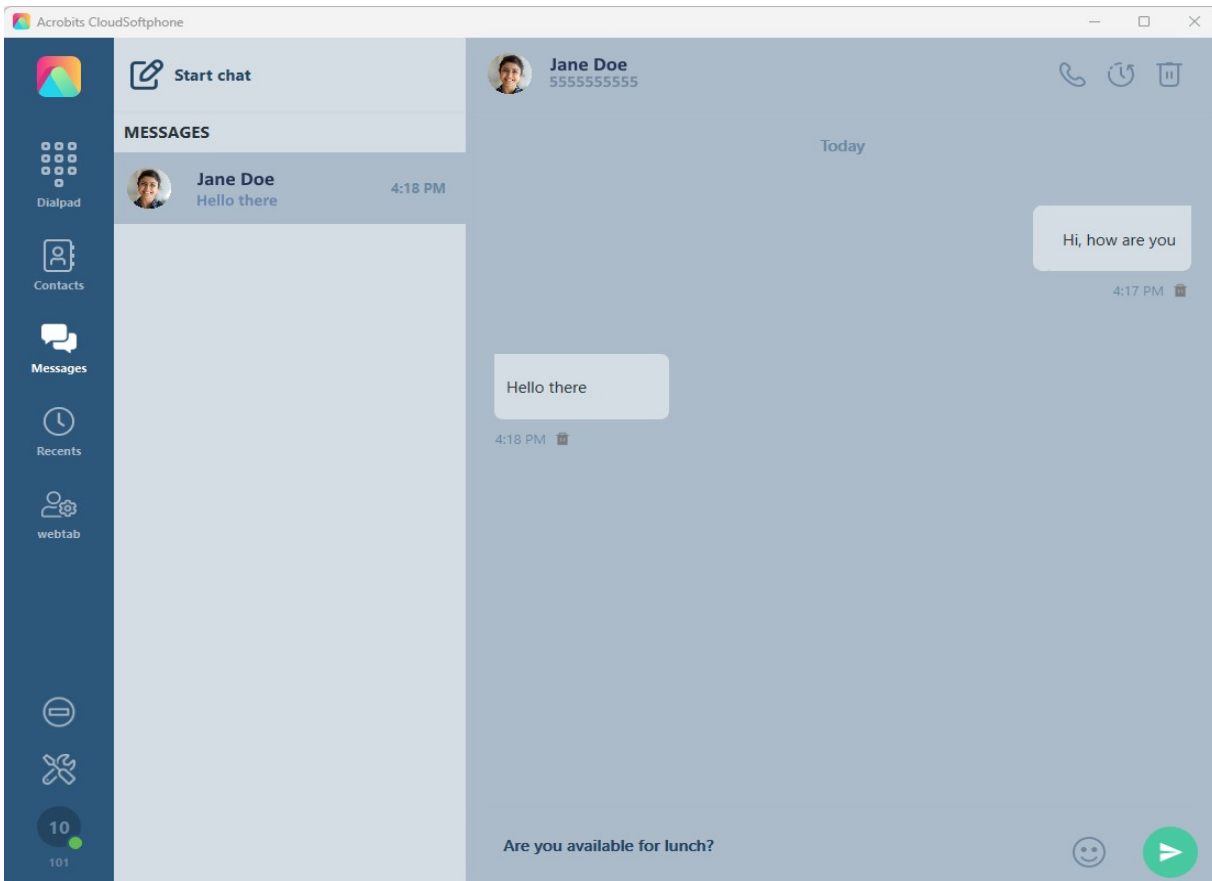
In order to start texting (*to an internal user or to an external phone number*), select a recipient from the **RECENTS** entries or by typing a name or number in the search box (*with the magnifying glass*) at the top of the **Main Screen** area. When you start typing, the **RECENTS** entries will be replaced with **ADDRESS BOOK** listing the address book entries that matches what was typed in the search box. Once the desired recipient is displayed, click on it to select, then click the **Start Chat** button at the bottom of the **Detail Screen** area.







Messaging - Conversation

Once a messaging recipient have been chosen, the previous conversation (*if any*) will be displayed in the Detail Screen area. Enter the next message to be sent at the bottom of the Detail Screen area and press the green send button  to send the message. There is also a smiley face button  to add an emoji to the message if desired.



 *It is important to remember you can only receive messages with the Desktop Softphone if the application is running, otherwise text messages sent while the application is not running will not be displayed when the application is started at a later time. However, messages received by the system are stored and accessible on the web portal.*

 *The web portal contains all messages sent or received by the system.*

- *All messages sent, regardless of the device used to send the message, can be accessed on the web portal.*
- *Likewise, all messages received, will be accessible on the web portal, regardless of whether a softphone application was running or not.*



Recents (Call History)

The **Recents** option shows your most recent calls activities related to your *Desktop Softphone*. Calls made from other devices won't be shown here. For a more complete call history showing calls related to all of your devices, you need to access your phone system's **Detail Call Records** via the user or admin web portal.

The *Main Screen* area will show a list of phone numbers (callers). Clicking on an entry in the list will show the detailed call activity for this particular phone number (caller) in the *Detail Screen* area.

On the Detail Screen area, the phone number and caller name (if available) will be displayed at the top. In the top right corner, the following three (3) icons represent:



Click on this icon to call back the phone number on the **Recents** call history screen.



Click on the **Filter Clock** icon to filter the **Recents** history to only display:
1) **All Calls**; 2) **Outgoing Calls**; 3) **Incoming Calls**; or 4) **Missed Calls** only.



Click on the **Trash Can** icon to delete either:
1) **Delete All Calls** for this phone number (caller); or 2) **Delete Complete History**

The list of calls for a particular phone number (caller) is grouped by date. For each entry, the date and time of the call is displayed in addition to the call answering status.



Incoming Call (00:00)

When an incoming call is answered, the duration of the call is displayed between parenthesis.



Incoming Call (Answered Elsewhere)

When an incoming call is answered on another device, the softphone will stop ringing, but will show this message in the **Recents** call history.



Incoming Call (Rejected)

If you reject an incoming call, the call will be logged as such in the **Recents** call history.



Incoming Call (Missed)

If the incoming call was not answered, the call will be logged as such in the **Recents** call history.





Outgoing Call (00:00)

When an outgoing call is answered, the duration of the call is displayed between parenthesis.



Outgoing Call (Canceled)

If you cancel a call after it rang the destination, the call will be logged as such in the **Recents** call history.

Under each call activity entry, next to the date and time of the call, there is a trash can icon  to remove this particular entry from the **Recents** call history. Also, if the **Call Recording** feature has been enabled, there will be a download icon  in order to save the recording on your computer. The *Desktop Softphone* recording feature is managed by the user and is different from your phone system call recording feature.



Clearing the Recents call list on the Desktop Softphone will not remove these entries from other devices' Call History, nor will it remove them from your phone system's Call Detail Records.



Contacts

The **Contacts** tab will show your phone book entries, the *Main Screen* shows you a list of all your entries for a particular category, while the Detail Screen will show all the related information on a particular entry.

At the top of the *Main Screen* area, there is a pull-down menu with three (3) phone books categories to choose from.

Quick Dial	This is a list of entries that can quickly be accessed to make calls or to see the presence status of other extensions in your phone system. Refer to the Quick Dial – BLF management section for more information.
Contacts	This phone book category represents the phone book entries as defined in your phone system and is updated on a daily basis. If you need to update these entries on your <i>Desktop Softphone</i> , use the Reprovision option in the Settings menu.
Office365	This is to access your Microsoft Office365 contacts. If you authorize your <i>Desktop Softphone</i> to connect to your Office365 account, these contacts will be downloaded onto your <i>Desktop Softphone</i> application (username and password required).

Quick Dial - BLF Management

The **Quick Dial** entries are centrally managed via the user or admin web portal, this ensures these **Quick Dial** entries will also be available on your *Mobile Softphone*, if it has been installed. This also means your **Quick Dial** will be reinstalled if you have to reinstall your *Desktop Softphone* application or change computers. Please refer to the web portal documentation for more information on how to manage **Quick Dial** / Presence indicator (Busy Lamp Field).



*Although it is possible to enter a **Quick Dial** entry using your Desktop Softphone it is not recommended as these locally-entered entries are not uploaded onto your phone system and consequently won't be available to your Mobile Softphone application or if you need to re-install your Desktop Softphone.*

Webtab

The **Webtab** icon gives you access to the system's web portal, enabling access to your phone system's advanced features and functionalities. Although you can always access the web portal from any browser, the **Webtab** allows for a seamless experience from with the Desktop Softphone applications. The specific instruction to navigate and control the system user settings is beyond the scope of this guide. Please refer to the web portal guide for more information.