

CONNEX CLOUD OFFICE

DESKTOP SOFTPHONE QUICK USER GUIDE

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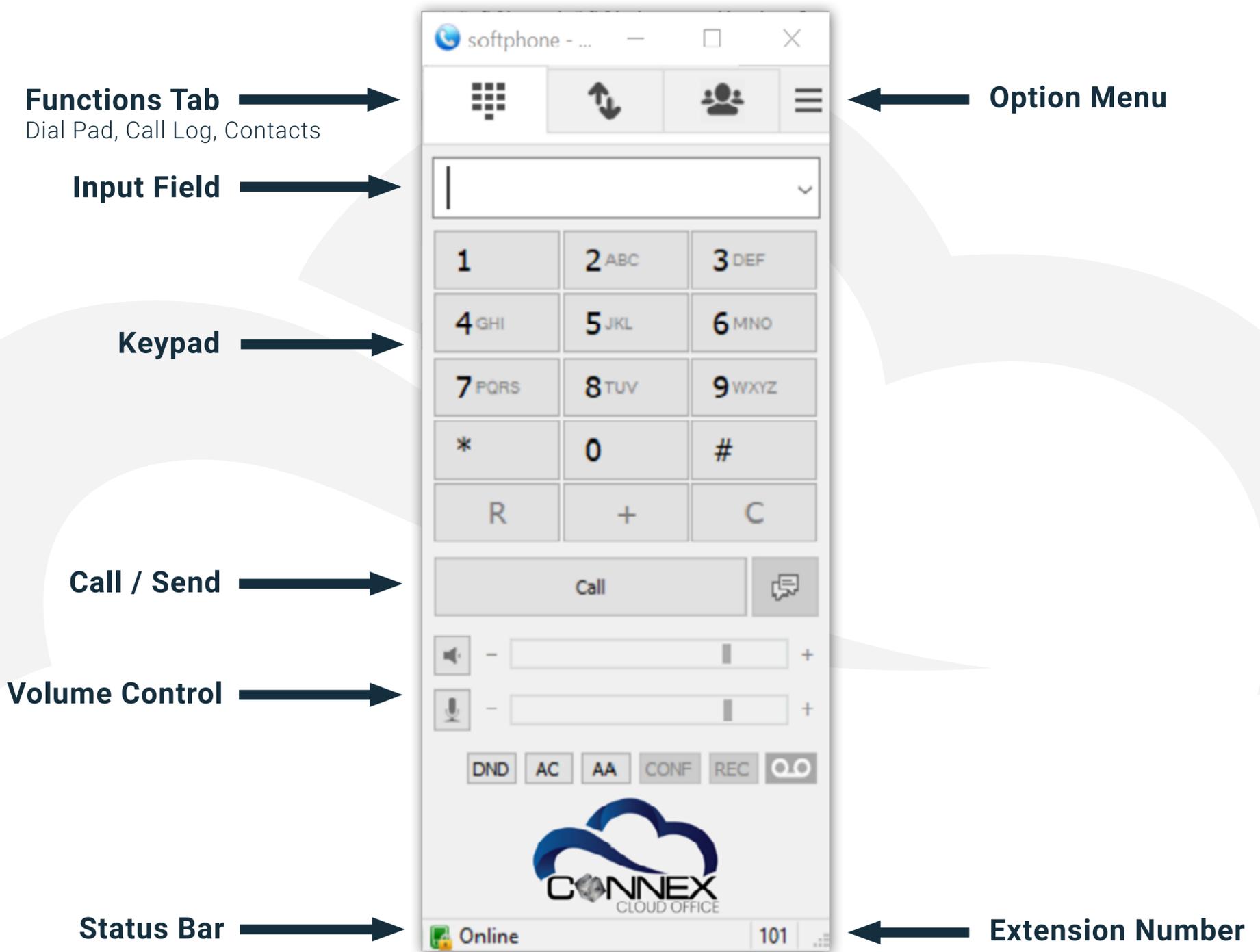
CONNEX CLOUD OFFICE

MOBILE SOFTPHONE QUICK USER GUIDE

Your **CONNEX Cloud Office Desktop Softphone** (referred as **Desktop Softphone**) should be installed on your computer and registered with our **Cloud Telephony** service. If this is not the case, please refer to the **Desktop Softphone Installation Guide** to install the softphone on your computer.

The softphone is a feature-rich software-based telephone that integrates with our **Cloud Telephony** service. This guide describes how to the features provided by the softphone.

MAIN DESKTOP SOFTPHONE WINDOW



MAIN WINDOW ELEMENTS



MAIN FUNCTIONS NAVIGATION SECTION

This section allows you to quickly navigate the core functions of the softphone application. Simply click on the respective function to display it on the main window.



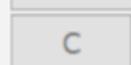
INPUT FIELD SECTION

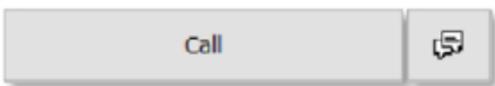
This section allows you to enter the extension or phone number you wish to call. You can use either numeric keys on your keyboard or click on the numeric keys on the **DIAL PAD** section.



DIAL PAD SECTION

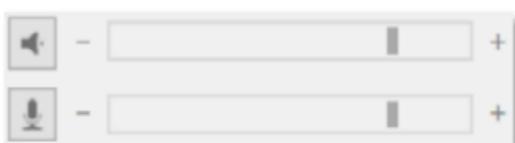
The dial pad allows you to enter a phone or extension number using your mouse instead of the keyboard. During a call you can also use the dial pad to navigate **Interactive Voice Menus (IVR)** and **Auto Attendant (AA)** systems.

-  **REDIAL** – Call the last number dialed.
-  **BACKSPACE** – Erase the last digit entered in the input field.
*This key replaces the **R** key when you start entering a phone number.*
-  **PLUS** – To start dialing an international number.
-  **CLEAR** – Erase the phone number in the input field.



CALL / MESSAGE SECTION

Once you have entered a phone or extension number in the input field, you can either click **CALL** to make a call or click on the message icon  to open the message window.



VOLUME CONTROL SECTION

The speakers and microphone volume sliders allows adjusting the volume of the respective audio device. You can also click on the respective + or – sign to increase or lower the volume.

Click on the **SPEAKER** or **MIC** icon to mute or unmute.



CONTROL SECTION

This section contains buttons to control the behavior of incoming calls like **DO NOT DISTURB** and **AUTO ANSWER**. It also offers quick links to features like **CONFERENCING**, **RECORDING**, and **VOICEMAIL**.



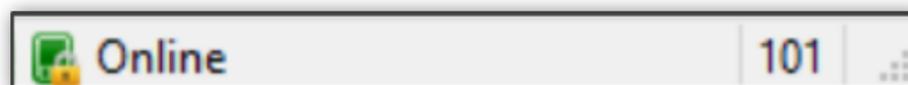
STATUS SECTION

The bottom section of the softphone application is the status area where you can quickly see if your softphone is connected to your **Cloud Telephony** service, or if the **Do Not Disturb** mode is enabled. You can also see your **Extension** number on the right side.

HOW DO I KNOW IF MY DESKTOP SOFTPHONE IS RUNNING AND ACTIVE?

The softphone is configured to run at system startup and should always be running to ensure you can receive and make calls. When the softphone is running and active, there will be this  icon or this  icon (if you missed a call) in the system tray area.

When the softphone main window is in the foreground, you will see the softphone status bar at the bottom of the window.

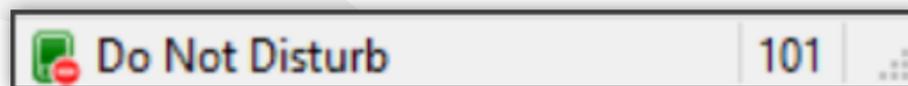


The status area shown above displays that your softphone status is **Online**, meaning it is connected to our **Cloud Telephony** service and is ready to make and/or receive calls. On the right, you see the extension number that is assigned to you, in this example, extension **101**.

HOW DO I ENABLE THE DO NOT DISTURB MODE?

The **Do Not Disturb** (DND) mode will prevent incoming call to ring on your softphone. To enable or disable this feature, click the  icon below the volume control section of the softphone main screen.

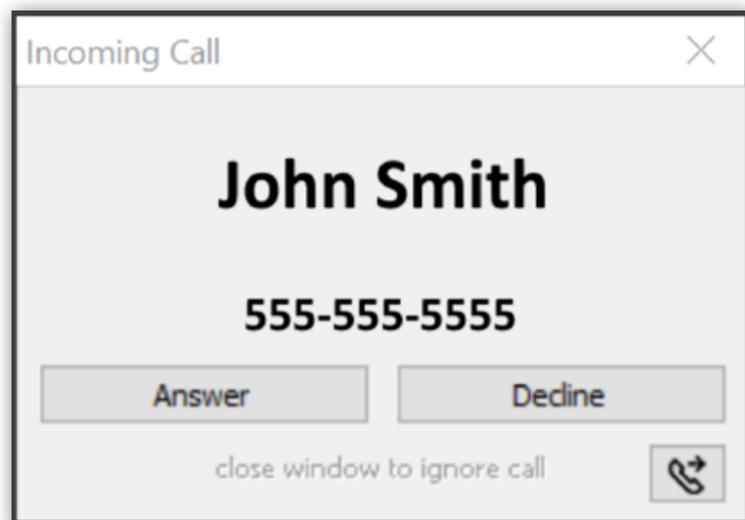
When it is enabled, the status bar at the bottom of the softphone windows will show it is this mode.



With this mode enable on your desktop softphone phone, the system will ring other devices you may have configured, for example, your mobile softphone or your desk phone. Additionally, the system will adhere to the **Follow-Me** setting for your extension.

You can enable the **Do Not Disturb** feature at the system level, by dialing ***78**, and ***79** to disable the feature. With this feature enabled at the system level, incoming calls will not ring any of your devices and the call will be sent to your voicemail automatically.

HOW DO I ANSWER AN INCOMING CALL?



Your softphone runs in the background allowing you to focus on other applications. Refer to the section ***How do I know if my Desktop Softphone is running and active?*** to ensure your softphone is ready to make/receive calls.

When you have an incoming call, a pop-up window will appear in the foreground and display that you have an incoming call and give you options to **Answer**, **Decline** or **Transfer**  the call to someone else.

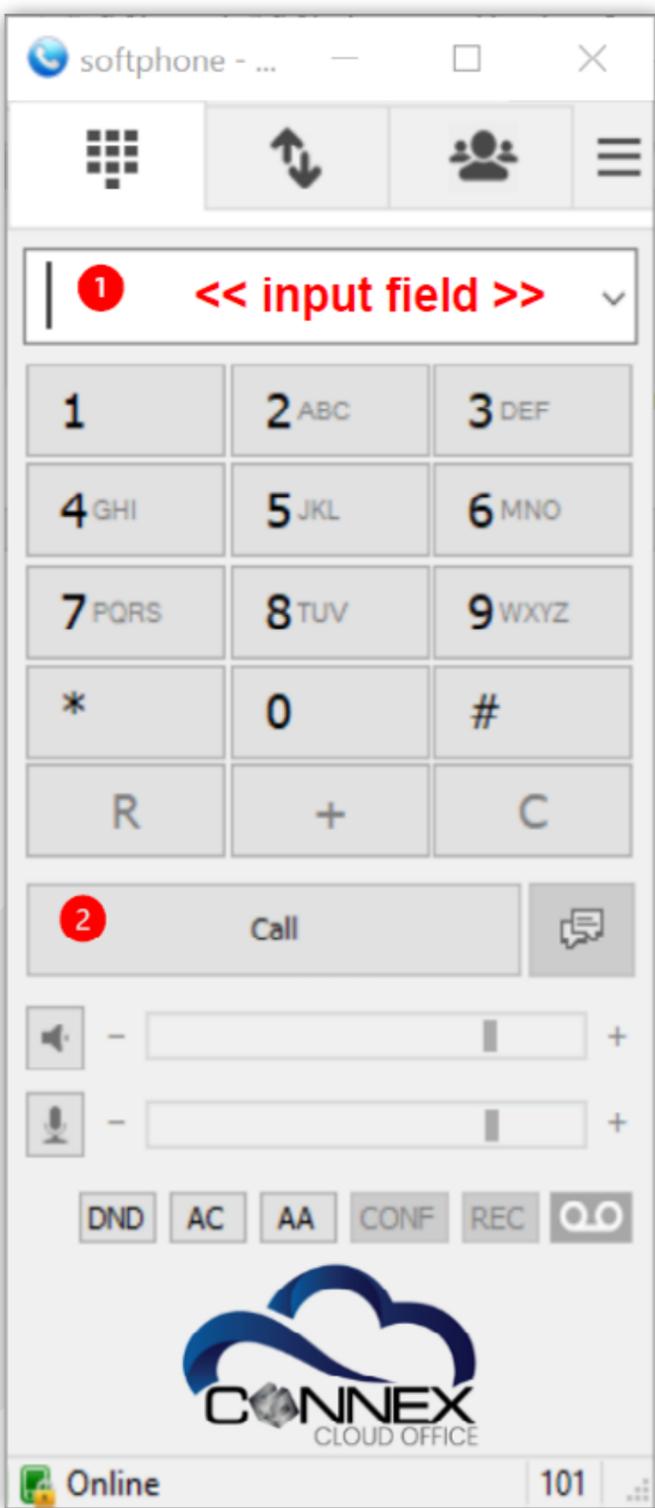
Click on the corresponding button to the action you would like to take for the incoming call.

HOW DO I ACCESS TO MY VOICEMAIL?

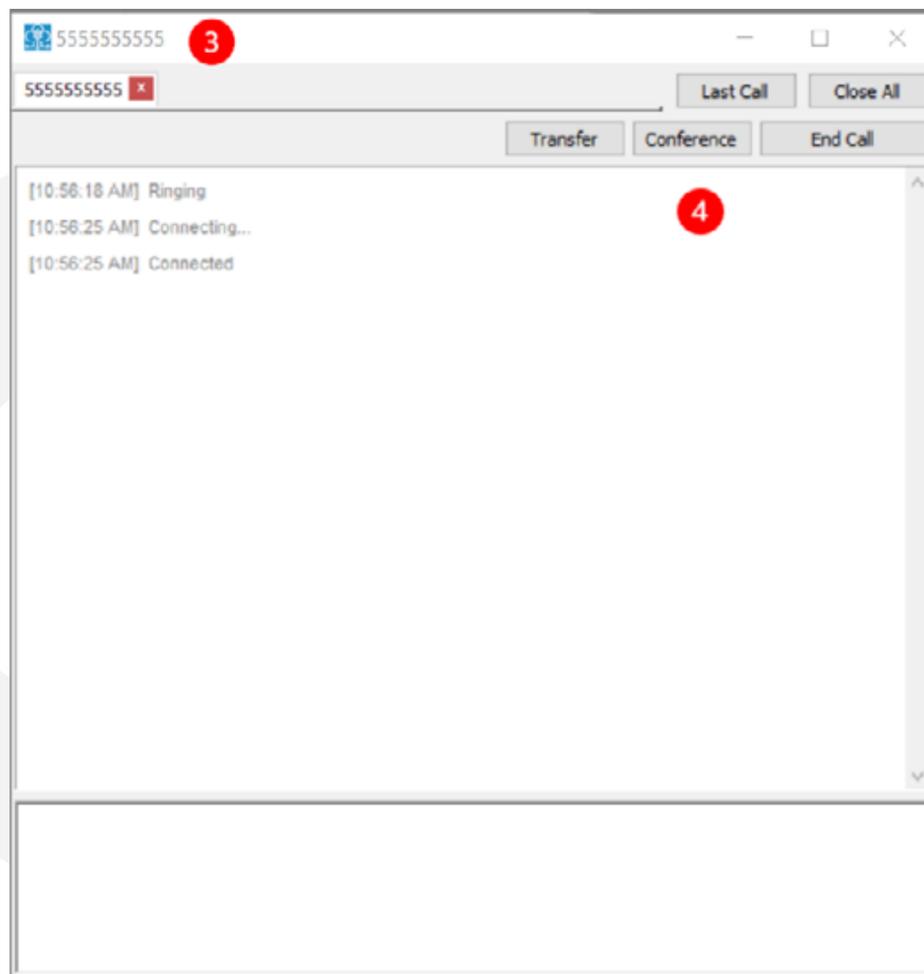
There is a quick access **Voicemail** button below the volume control section on the softphone main screen. If you have a message the **Voicemail** icon  will turn red like this  to show you have unread **Voicemail** message(s). Simply click the icon to access your **Voicemails**.

HOW DO I MAKE A CALL?

Bring the softphone main windows in the foreground by double-clicking on the softphone tray icon.



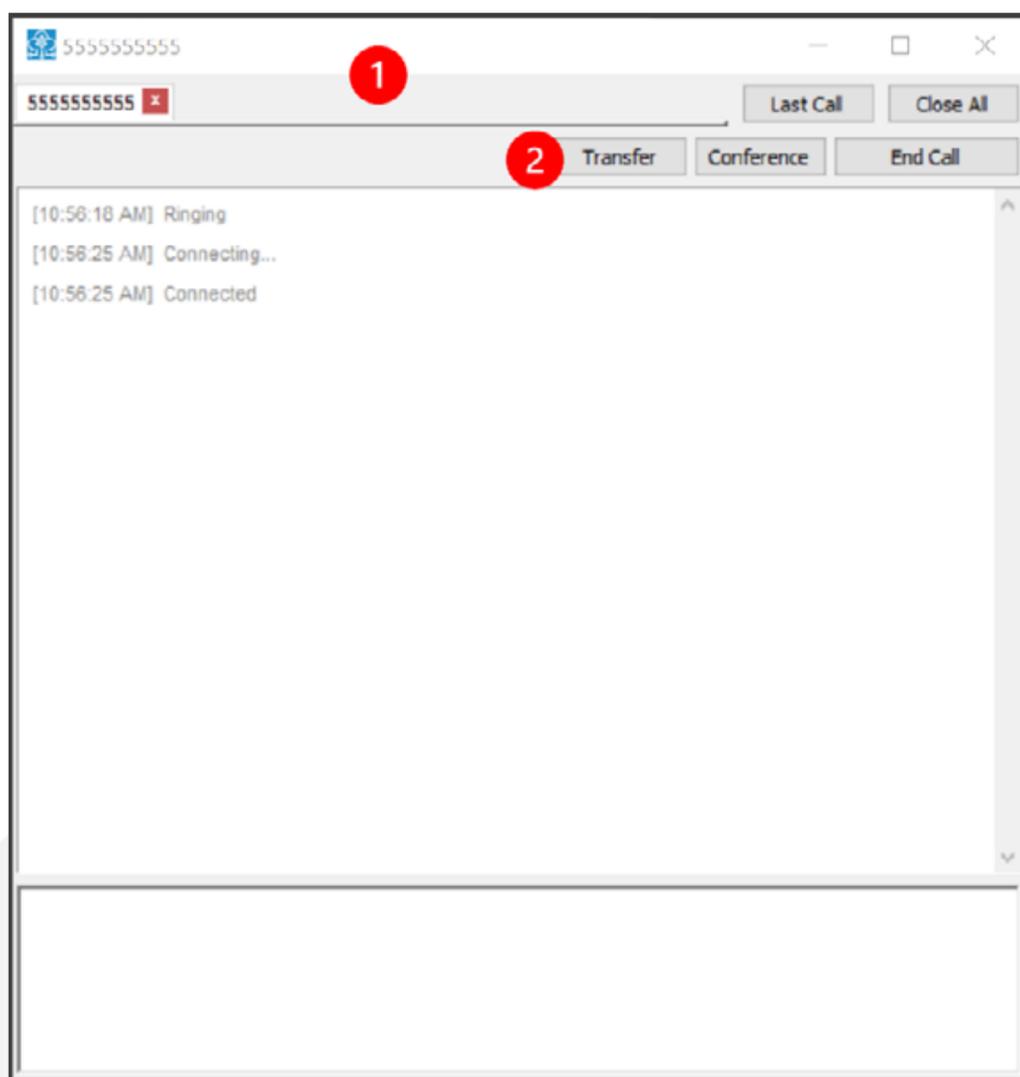
- 1 In the << **input field** >> area of the softphone, type in the phone or extension number you would like to call.
- 2 Press the **CALL** button to make the call.
- 3 A **Message** window shown below will appear and display the call progression messages.



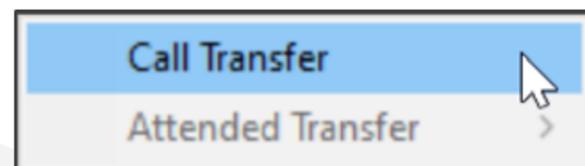
- 4 When the call is in progress, you will see the action buttons **Transfer**, **Conference** and **End Call**. Please refer to the appropriate section for more information on the action buttons.

HOW DO I BLIND TRANSFER A CALL?

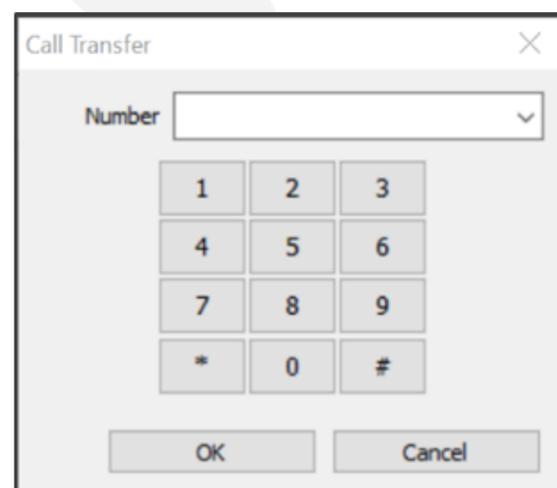
A **Blind Call Transfer** simply transfers to call to someone else without introducing the call transfer to the destination. If the destination is not available, the call will be transferred to their voicemail.



- 1 In the **Call Message** window,
- 2 Click on the **Transfer** button. An option menu will appear, choose **Call Transfer**.



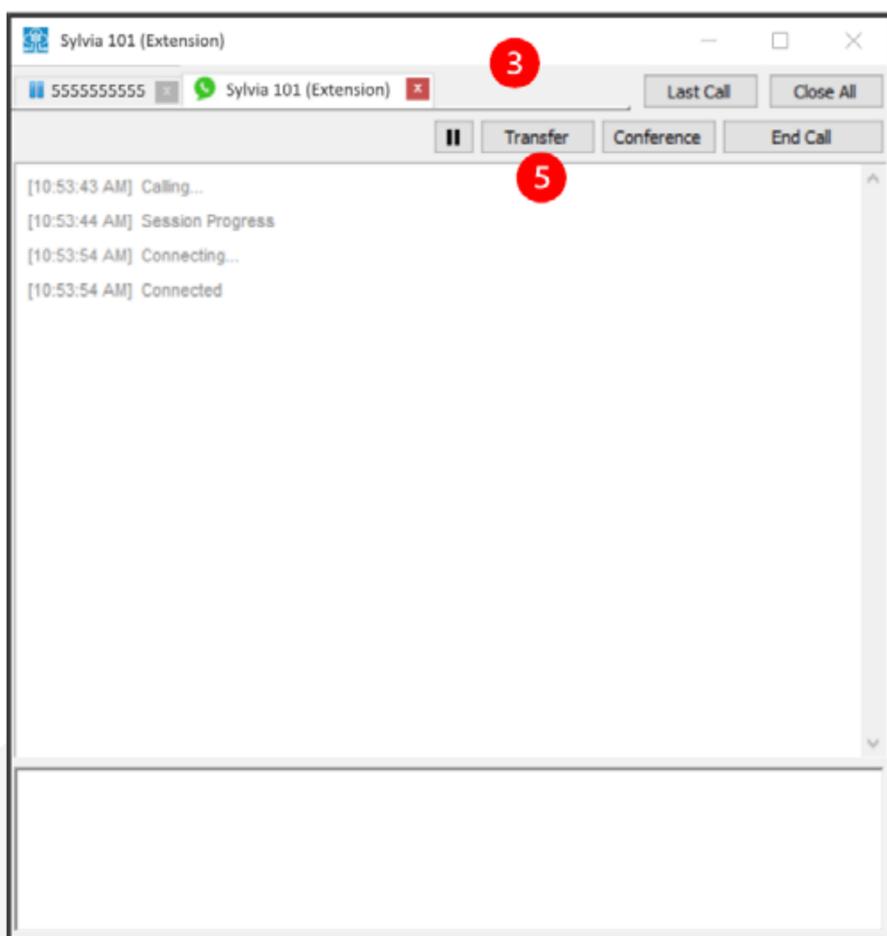
- 3 A small **Call Transfer** window will appear, enter the transfer destination number in the **Number** input field.



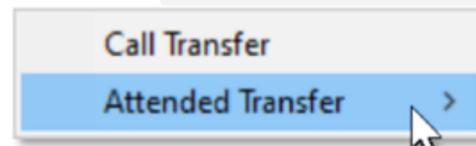
- 4 Click **OK** and the call will be transferred. Click **Cancel** if you wish not to transfer the call.

HOW DO I INTRODUCE A CALL BEFORE TRANSFERRING (ATTENDED TRANSFER)?

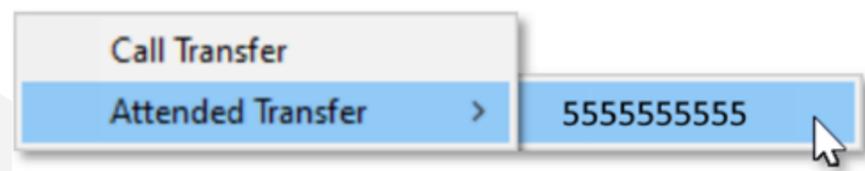
An **Attended Call Transfer** allows you to talk to the transfer destination before the call is transferred. This option is useful to introduce the call and confirm that the destination is available before initiating the **Call Transfer**.



- 1 With a call in progress, make another call using the dial pad (refer to the corresponding section).
- 2 The first call will be placed on hold.
- 3 Your **Call Message** window should show two (2) active calls. The first one on hold  and the second active . See an example on the left.
- 4 Announce the call transfer to the destination.
- 5 Click on the **Transfer** button and choose **Attended Transfer**.

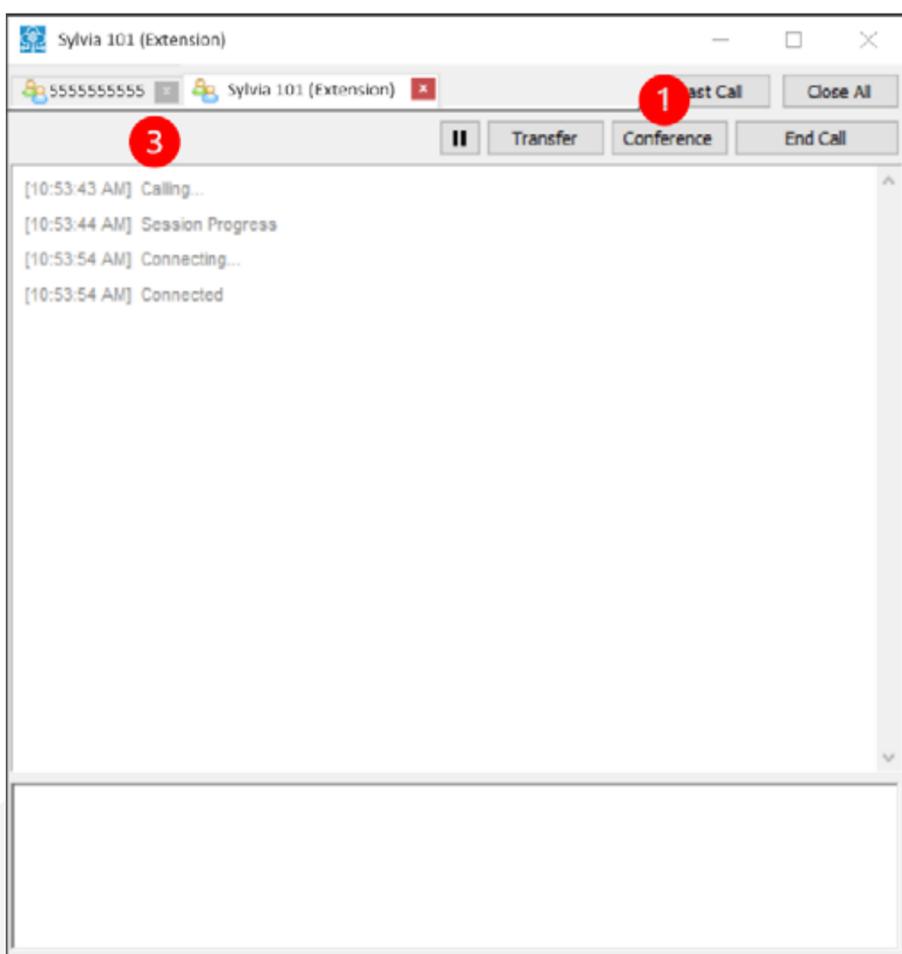


- 6 Click on the call on hold and the call will be transferred.



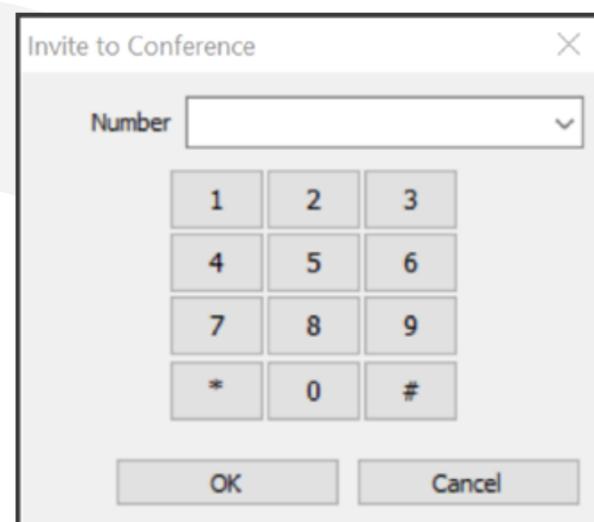
HOW DO I CONFERENCE SOMEONE INTO AN ACTIVE CALL?

To can easily add a participant to a call in progress. There is a **Conference** button in the **Call Message** window. Simply follow the steps below to add a third party to a call.



1 Assuming you are already on a call, click the **Conference** button in the **Call Message** window.

2 A small **Invite to Conference** window will appear, enter the **Phone** or **Extension** number you want to add to the call. Click **OK**.

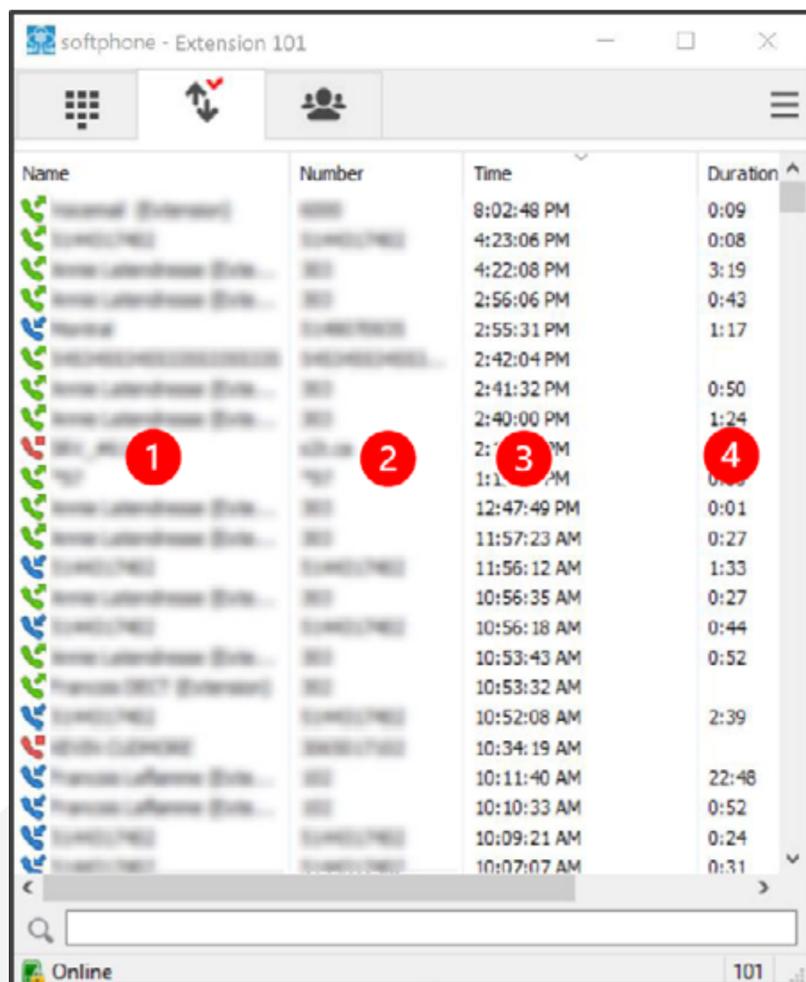


3 Once the conference is established, you will see the  icon next to each participant's name and number of the conference.

HOW DO I VIEW MY CALL HISTORY?

The softphone allows you to view your call history. To access your **Call History**, click on the tab  at the top of the softphone window.

If the **Call History** tab shows this  symbol, it indicates that you have missed calls.



- 1 The **Name** column shows the **Caller ID** if available, otherwise the phone number is displayed. The status direction is also shown in this column.

Call Direction

Outgoing

Incoming

Missed Call

Icon



- 2 The **Number** column shows the phone number.
- 3 The **Time** column shows the time of the call.
- 4 The **Duration** column shows the call duration.

How to call back a number in the Call History tab:

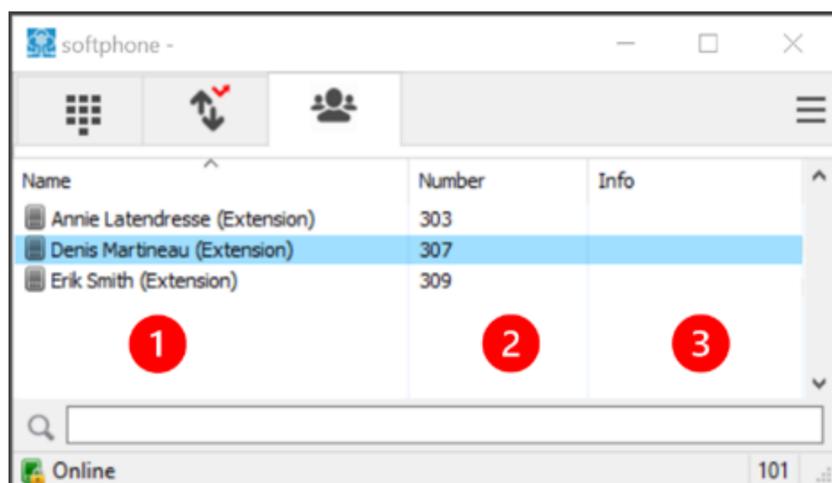


- 5 To call back a number in the **Call History** window, simply highlight the desired entry in the **Call History** and double-click on it. A **Call Message** window will appear for the entry you selected.

- 6 Click the **Call** button.

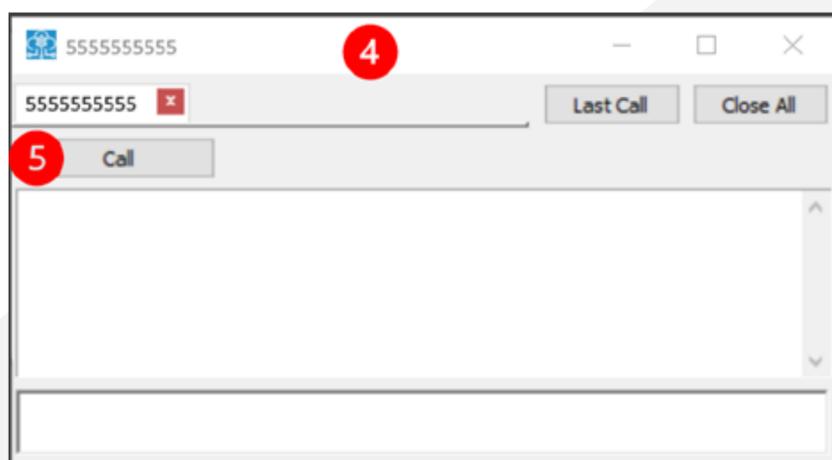
HOW DO I VIEW MY CONTACTS?

The softphone allows you to view your contacts. To access your **Contacts**, click on the tab with this  icon at the top of the softphone window.



- 1 The **Name** column shows the **Contact Name**.
- 2 The **Number** column shows the extension or phone number.
- 3 The **Info** column shows information of the **Contact** as entered in the system.

How to call a Contact:



- 4 To call back a **Contact** in the **Contacts** window, simply highlight the desired entry and double-click on it. A **Call Message** message window will appear.
- 5 Click the **Call** button.

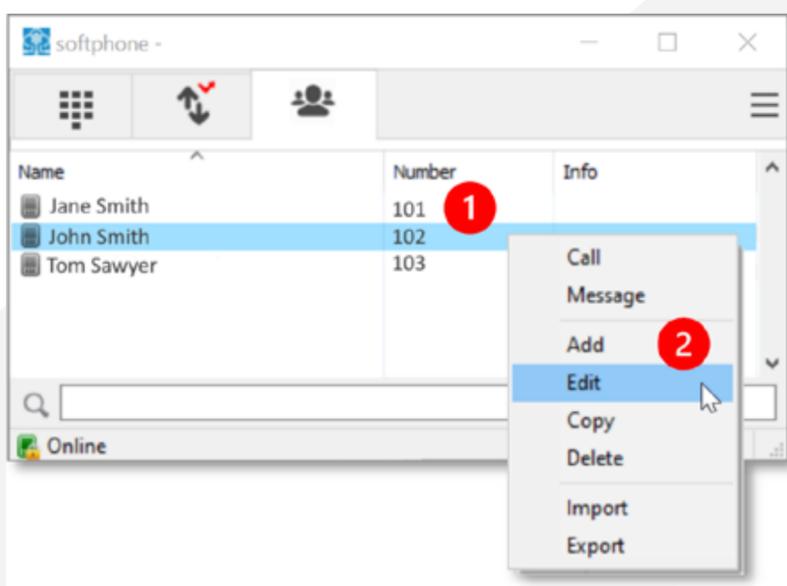
HOW DO I SEE OTHER USERS' PRESENCE STATUS (BLF LIST)?

Your softphone allows you to track the presence (**BLF**) information of users of the system, showing you if they are available to receive a call (**Available**), on the phone (**Busy**), or not connected to the system (**Offline**). **BLF** is a technical acronym in the telephone industry that means **Busy Lamp Field**, which refers to the status lights on traditional business phones.

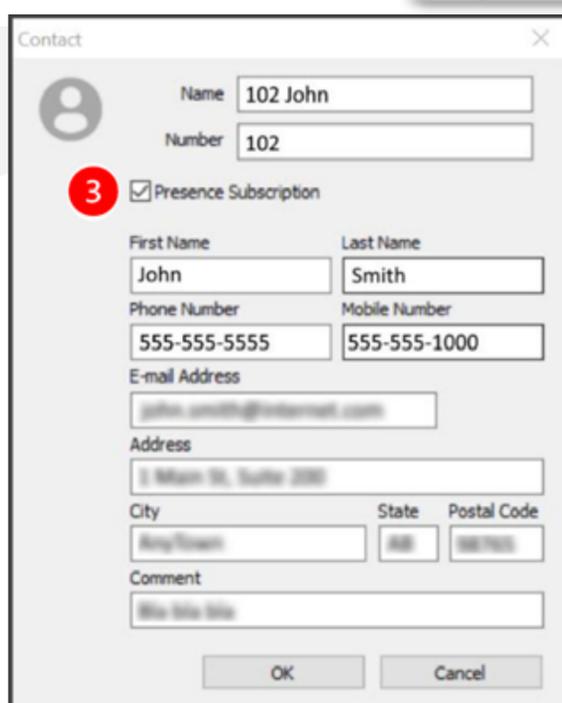
For your softphone to monitor the availability (or presence information) of other system users, you need to subscribe to the user presence updates. The following steps will walk you through how to add a contact to your **BLF** list.

Step 1 – How to identify a presence status from your Contacts List

To access your **Contacts**, click on the tab with this  icon in the function navigation section at the top of the softphone window.

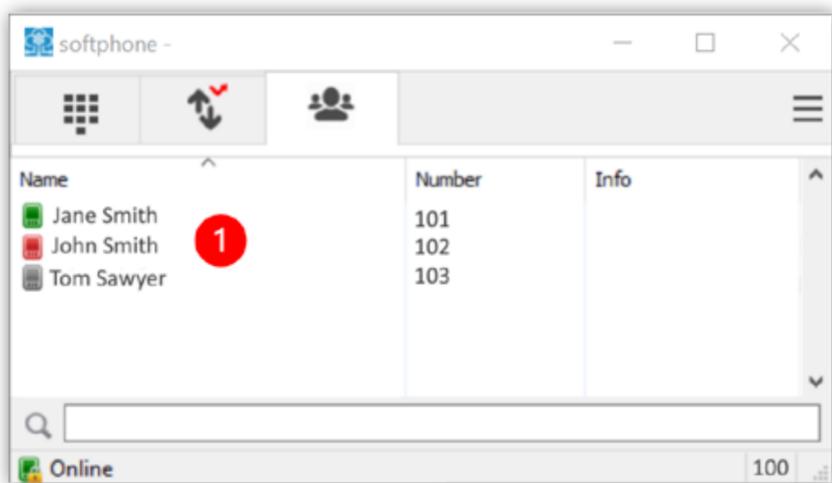


- 1 Select the **Contact** you want to receive presence information, and right-click for the **Options** menu.
- 2 Choose **Edit** to edit to **Contact** information.
- 3 To enable receiving presence information for this **Contact**, make sure the **Presence Subscription** box is checked (as shown in the image on the left).



Step 2 – View the User Presence information for your internal contacts.

You can view the user presence information of the internal contacts you have enabled to receive presence updates in your **Contacts**. To access your **Contacts**, click on the tab with this  icon in the function navigation section at the top of the softphone window.



1 To the right on the **Contact's** name, there is an icon showing the presence status.

Presence Status

Available
 Busy
 Offline

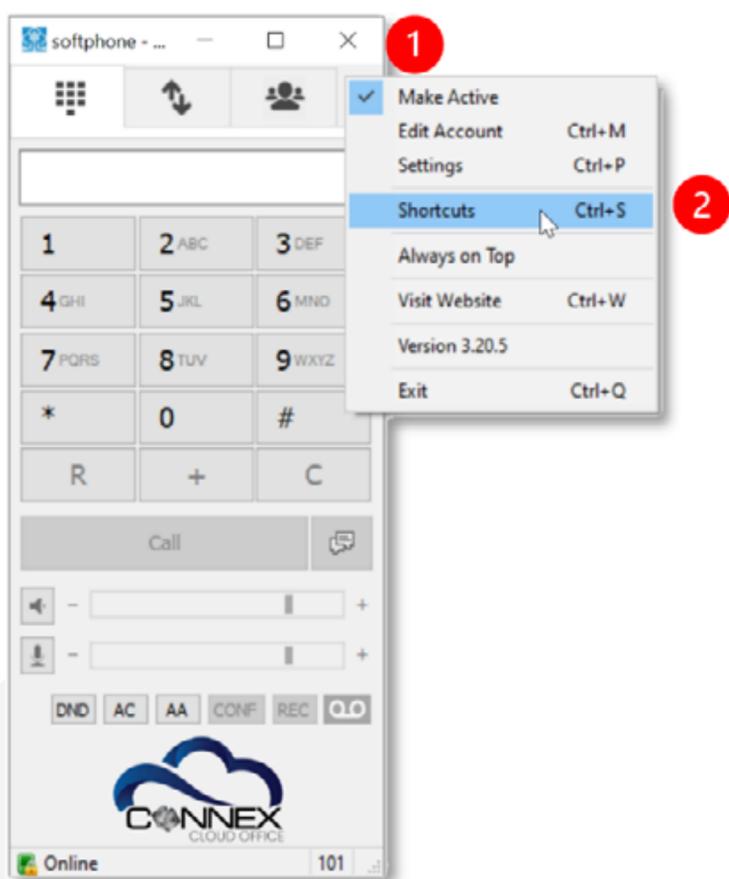
Icon



HOW DO I CREATE SPEED DIALS AND OTHER SHORTCUTS?

Your softphone allows you to define speed dials and other useful shortcuts. You can have up to twelve (12) speed dials or shortcuts.

By default, **Shortcuts** are not displayed. You need to **Enable** the feature, **Exit** and **Restart** the softphone application.



- 1 To enable **Shortcuts**, click on the **Options** icon  at the top right of the softphone window.
- 2 Click on **Shortcuts** to open the **Shortcuts** configuration window.

In the **Shortcuts** window, you can program up to twelve (12) **Shortcuts**.

- 3 The **Label** column is the text that will be displayed on the **Shortcut** button.
- 4 The **Number** column is the number associated with the shortcut.
- 5 The **Type** is the type of **Shortcut**.

In addition to speed dials, shortcuts can also be programmed to perform these actions:

Call: Dial the specified number.

Message: Open a message window for the specified number.

DTMF: Send a series of digits (DTMF).

Call Transfer: Transfer the call to the specified number.

Conference: Conference the specified number.

Run Batch: Run an external program.

Pop URL: Popup your default browser with the specified URL.

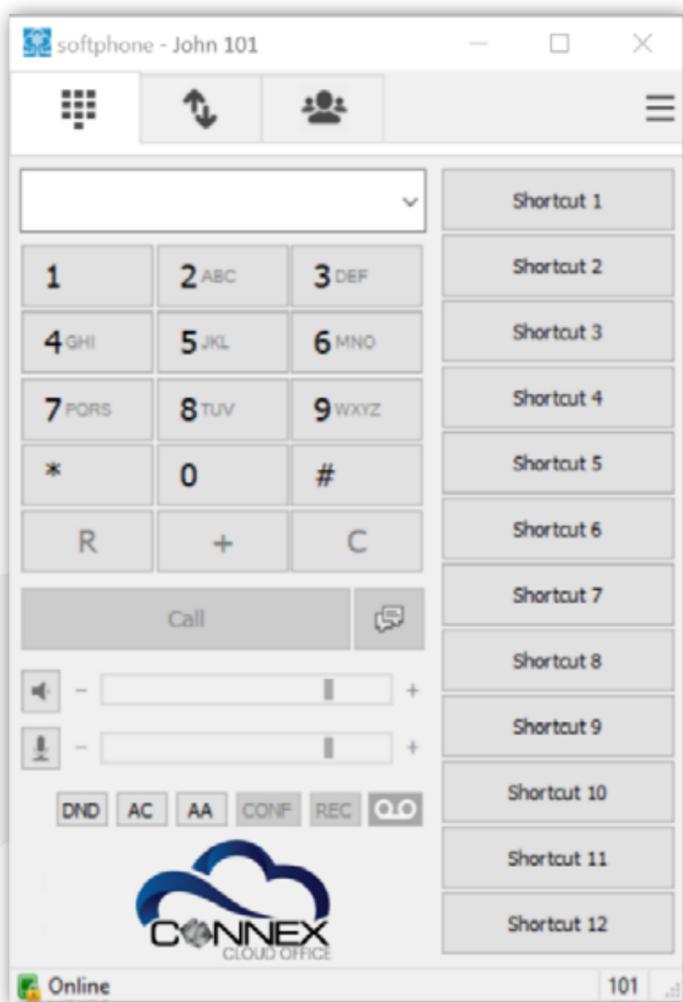


Shortcuts display locations

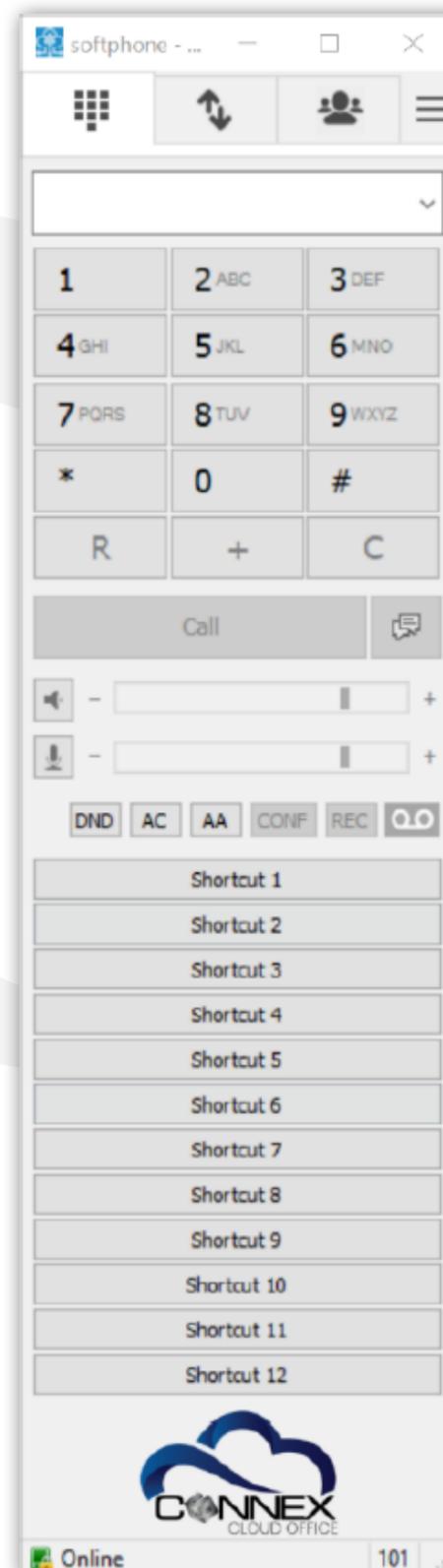
You have the options to display your speed dials/shortcuts to the right of the dial pad (default) or below (**Bottom Position** checkbox). When you change the display location of your shortcuts, you need to **Exit** and **Restart** the softphone application.

Below shows the two (2) different locations to have the **Shortcuts** appear on the **Dial Pad** screen.

Default shortcuts display location



Optional bottom display location



HOW DO I ADJUST THE SPEAKER/MICROPHONE LEVELS?

The softphone allows you to control the volume of your computer speakers and microphone directly from the main softphone window.

- 1 To mute or unmute the speakers or microphone, simply click on the respective device icon in the audio control section of the main softphone window.

Device Icons

Speakers

Microphone

Unmute



Muted



- 2 To increase or decrease the volume of the respective device, use the slider bar or the + or -.

