About IPVoice Desktop App

The IPVoice desktop application comprises a softphone extension, Instant Messaging capabilities and management features such as indicating if a rep is present or not.

Operating System Requirements

IPVoice desktop app will run on any PC that is running Windows Vista (32 or 64-bit) onwards or Mac OS version 10.10 onwards.

Contacts

The Contacts list is a list of all your saved or imported Contacts, filtered by source - e.g. All, Microsoft Outlook, Google, CRM (Salesforce).

Within the Contacts list, tabs are used to display Contacts you have imported from email or contact management tools. The first of these tabs displays a master list of all saved and imported Contacts, regardless of their origin.

- Double click a Contact to call or instant message them, depending on which preferences you have set.
- Drag a contact onto an open module to perform a particular action for that Contact.

Quick List Icons

Quick list icons appear at the bottom of the main CallSwitch Communicator window and enable you to quickly move between the **'Directory'**, **'Contacts'**, **'Favourites'** and **'Recent'** lists.

The IPVoice Toolbar
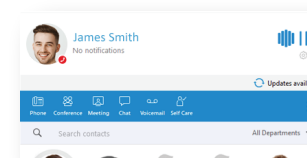
The main IPVoice toolbar shows your profile name, image, current status and whether you have any missed calls. Importantly, it also acts as a short cut to open IPVoice modules or other key application features.

Change your Profile image
1. The photograph or avatar displayed on your user profile. To change your profile image, double click the image to open a **'Browse'** window, and then browse to any .gif, .jpg or .png file.

2. Your IPVoice profile name, as selected when you created your profile. To change your profile name, edit your profile by launching the Profile Wizard from either the 'Log in' or 'Preferences' windows.

See your missed calls
See displayed the number of missed calls. Click the 'Missed calls' message to open the 'Missed calls' tab and display additional information.

How to change your status and status message
To change your status, click the icon and select from a list that includes **'Online'**, **'Busy'**, **'Do not Disturb'**, **'Away'** and **'Offline'**. To add a personal status message select **'My settings and status'**. Your profile image can also be changed from here. ie. Working from home.

The IPVoice Toolbar (Cont.)

Place a call
Open the 'Softphone' module (Dial Pad) next to the main IPVoice Application window and dial the desired number.

Place a Conference call
Open the **'Voice Conference'** module next to the main IPVoice window and drop contacts into it.

Start Group Chat
Open the 'Group Chat' module next to the main IPVoice window.

Answer a Call
Click the button **'Answer'** on the ongoing call popup window.

Transfer a Call
Drag & Drop

1. Whilst in an active call, press and hold the **'Transfer'** call control button and drag this over a contacts image.
2. Release the transfer button over **'Blind'** for a direct transfer, or **'Attended'** for an attended transfer.
3. On an attended transfer, confirm the transfer with the **'End Call'** / **'Atxfer'** button.

Click
1. Click **'Transfer'**, type in the recipient and choose **'Blind'** or **'Attended'**.
2. Confirm with the **"End Call"**/ **'Atxfer'** button.

Check Your Messages
Open the **'Voicemail'** module next to the main IPVoice window. This icon will blink if you have any new or unread voicemail messages.

Parking a call
Park your call to a specific location.

Look for Settings
Open the Preferences window.

Status

Change your status by clicking on the status indicator on your avatar:

🟢 Online
📞 On a call
🔴 Busy
⛔ Do not Disturb
🟡 Inactive or away
⚪ Offline

The Directory

The Directory is a list of all of your IPVoice Contacts. This includes all Contacts within your organisation automatically, so there is no set-up necessary.

• To select a Contact as a favourite, right-click the Contact and select **'Add to favorites'**.

• If a Contact appears with a green telephone next to it, they are 'present', which means they are at their desk and available for you to call or message.

• Right click a Contact to perform one of the following operations, depending on the version of IPVoice you are using:
*Call
*Video call
*Send email
*Voicemail
*Chat
*Send email
*Call monitor
*Add to favourites
*Hide

Individual and Group Chat

The chat windows enable you to participate in real-time instant message conversations with one or more Contacts.

1. Open a chat window by right-clicking a Contact and selecting **'Chat'** or by opening the Group Chat module.

2. Alternatively, configure your Preferences to open a chat by double-clicking on a Contact.
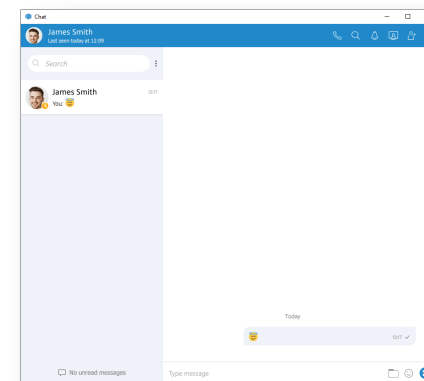
Using the Chat Window
1. Start typing your message and it will appear at the bottom of the window.

2. When you finish your message, press 'Enter' on your keyboard to send. Your message will then appear near the top of the window, along with your profile image, your name and the time the message was sent.

3. When your Contact responds, their message will appear beneath yours along with their profile image, name and the time they sent the message. You can then type a reply to continue the conversation.

4. At any time during a chat, you may drag additional Contacts into the Chat window to include them. When you have finished chatting, close the Chat window to end the chat.