

Telia Touchpoint Flex Softphone

User guide



Telia Touchpoint Flex Softphone: User guide

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Chapter 1. Getting Started

Telia Touchpoint Flex Softphone makes it possible to place and receive calls using a computer connected to the Internet and the Telia Touchpoint Flex. Besides offering basic functions such as placing and receiving calls the application enables presence status management, corporate directory search and instant messaging.

The main features are the following:

- Basic call handling - place, answer, record, hold and retrieve calls
- Call transfer
- Conference calls
- Directory search
- Presence handling
- Messaging and collaboration

A welcome Email will be sent to you by your system administrator containing the link to download the application.

1.1. Installing

The application is installed by running a software installation package. When updating, the installation package is opened automatically.

Before installing, complete the following steps:

1. Exit any previous versions of the application by selecting **Exit** from the **File** menu.
2. Close any Microsoft Office related windows.



Note

If you have set the security setting on Internet Explorer or from Control Panel to *High* you need to add the server address to your trusted sites. See [Section 1.1.1, "Security settings"](#) for more information.

1.1.1. Security settings

If you have set the security setting on Internet Explorer or from Control Panel to *High* you need to add the server address to your trusted sites.

To add the server address to your trusted sites

1. Start Internet Explorer.
2. Select **Tools > Internet Options**.
3. Select the **Security** tab.
4. Select the **Trusted sites** icon.
5. Select **Sites**.

6. Enter the server address given to you by your administrator. This would be in the format: `http://example.servername.com` or `https://example.servername.com`.
7. Select **Add**.

1.2. Activation process

There are multiple options to activate the application.

Activate using a temporary activation code

1. From the activation view, fill in your username, your mobile number (including the country code e.g.+46736123456) or your custom user identifier.
2. You might also need to fill in the server address if it was not embedded in the application.
3. Press **Get activation code** button. An activation code will be sent to you by SMS (in case you provided mobile number) or by email.
4. Fill in the activation code and press **Activate** button.
5. If provided credentials are correct, your app is activated and should present you the main view.

Activate using your password

1. From the activation view, press the **Login with username and password** option.
2. Fill in your username or your custom user identifier and your password.
3. You might also need to fill in the server address if it was not embedded in the application.
4. Press **Login** button.
5. If provided credentials are correct, your app is activated and should present you the main view.

Chapter 2. Getting to know the application

2.1. Overview

Figure 2.1. User Interface Overview

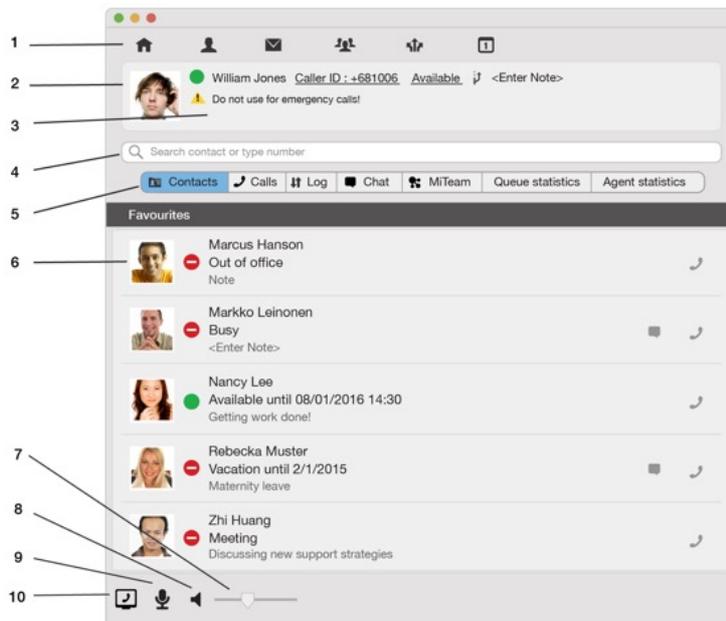


Table 2.1. UI area

1.	The toolbar contains shortcuts to call routing settings, inbox, contacts and conference settings. The functions are also available in the Telia Touchpoint Flex Web.
2.	Your picture, presence, name, Caller ID, diversion info and note. Click on your picture to see your vCard.
3.	Live aid area. Here you will see notifications for missed calls, transfers, etc.
4.	Search field
5.	Tabs to switch between the different views.
6.	Contacts/Calls/Log area. Each tab contains different information regarding contacts, ongoing calls, and log.
7.	Volume bar
8.	Click to activate speaker/headset mode
9.	Click to mute/unmute microphone
10.	Click to switch which device to call from

2.2. Icons

There are many function icons in the application. This section lists a few of the most important icons.

Table 2.2. Presence icons

Icon	Description
	The contact's presence state is available
	Contact is in a call
	The contact's presence state is unavailable
	Contact has a meeting that starts within 60 minutes according to Outlook
	Contact is in a meeting according to Outlook
	Current activity end time available
	Current activity end time expired
	Contact has an activity diversion configured

Table 2.3. Active call icons

Icon	Description
	Opens a keypad for sending tones
	Record the call
	Stop recording of the call
	Activate transfer
	Add the call to a conference
	Click to park the call
	Pick up a parked call
	Requeue call
	Click to hold the call
	Continue with the call held
	Hang up the ongoing call
	Encrypted call
	Unencrypted call
	The calling identity is asserted by the server
	Move call to another phone

Table 2.4. Other icons

Icon	Description
	Click to expand the contacts info
	Click to call
	Click to answer call
	Start chat/Collaboration
	Start chat/Collaboration (contact is away)
	Send an SMS message
	Intercom call
	Incoming call entry
	Missed call entry
	Outgoing call entry
	Edit the contact entry
	Add the contact to your Favourites list
	Remove the contact from your Favourites list
	Delete local contact
	Nightmode activated
	New message in the Inbox
	Logged in to an ACD or Attendant group
	Logged out from an ACD or Attendant group
	Call using desktop app (default)
	Remote call control for deskphone call
	Remote call control for mobile call
	Speaker mode activated
	Headset mode activated

2.3. Tray Icon

When not used the application is minimized in the traybar. It is possible to change activity, answer call, mute/unmute, hang up calls and exit in the minimized mode.

Chapter 3. Calling

3.1. Call Panel Overview

Figure 3.1. Call Panel Overview

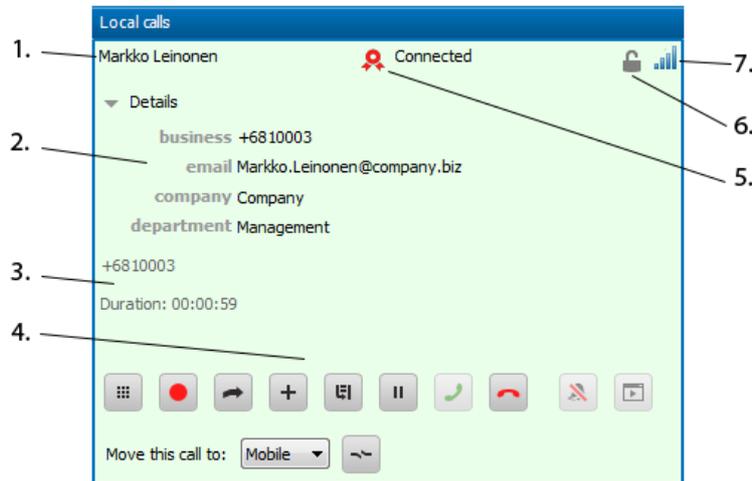


Table 3.1. Call Panel Area

1.	Connected party's name
2.	Connected party's vCard. Click to expand or collapse. You can click the email icon to open your email client.
3.	Connected party's number and duration of call. Short number is presented if available.
4.	Mid-call options
5.	Sign if the user is asserted by the system and call state. The call state shows whether the call is ringing, connected, on hold, etc.
6.	Encryption. The padlock indicates whether the call is encrypted (closed) or not (open). Encrypted calls is a security setting enabled by the system administrator.
7.	Network quality measured on the caller side as well as on the called party side

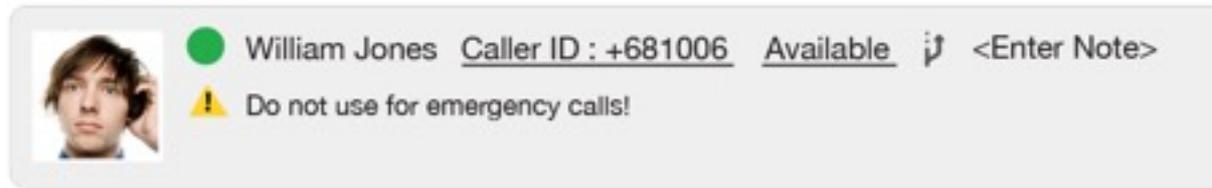
3.2. Line state

When a contact is in call this is indicated by the Line Busy icon  in the contact list.

3.3. Placing a call

3.3.1. Caller ID

The Caller ID displays which number that will be presented when doing a call. Your current Caller ID is displayed next to your presence.



The following outbound numbers can be set (not all may be enabled for you):

- Primary line
- Secondary line
- Switchboard number
- Anonymous
- ACD and Attendant numbers

Setting a new Caller ID is very easy:

To set a new Caller ID

1. Click on the current Caller ID
2. In the list that pops up, choose a new Caller ID

3.3.2. Normal call

Search for a contact using the contact list and click **Dial number** from the contact panel or enter a name or number in the search field and press the return key. If you enter a name you will need to select the contact, for example with your arrow keys, before pressing the return key.

The call button will change depending on which device that you will call with. For example, the desktop app, a deskphone and the mobile. See the call with section for more information.

You can also search for department or information in the free text fields. Your administrator sets which fields that are available to search in. The search result will show what field or text you match on.

It is possible to make a call even if there is an incoming call.

3.3.3. Intercom call

Search for a contact using the contact list and click **Intercom Call**  from the contact panel. The sound will only be one-way, so the caller can not hear the recipient. The Intercom call button is only available when the contact has at least one device that supports Intercom.



Note

Intercom call may not be allowed to all users even though the Intercom call button is shown. This will result in an error when trying to place the call.

3.3.4. Advanced calling options

The advanced call options for the application include Diversion bypass, Intrude ongoing call, Call with role, and Call with selected device. The options are available in the **Call** menu option.

3.3.4.1. Bypass diversion rules

Selecting **Bypass Diversion rules** will override any diversion set on the calling party. This option is only effective for the next call.



Note

Diversion bypass may not be available for all users. The service is only available to users that are authorized to bypass diversion.

3.3.4.2. Intrude ongoing call

Selecting **Intrude ongoing call** will intrude a call if the line is busy. This option is only effective for the next call.



Note

Intrude ongoing call is not be available for all users. The service is only available to users that are authorized to intrude ongoing calls.

3.3.4.3. Call As

Calling with a role can be used when you want to make a call and want a specific number to be presented to the calling party. For example, if you work within a support division it is possible to call with the role support and let the number associated with the support division be presented to the calling party instead of your own private number.

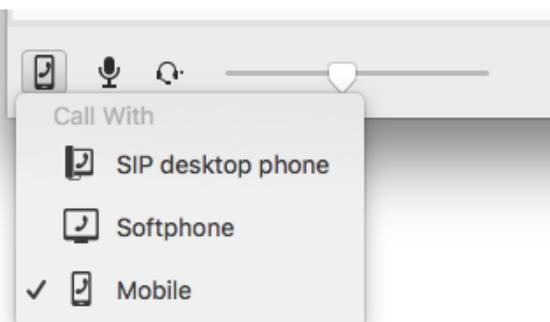
Select a role from the **Call as** list to call with a role. This option is only effective for the next call. Once the call is made, the role is reverted back to the current role. See the Roles section for more information.

3.3.4.4. Call With

Call with can be used if you want to set up your call using the application but want to handle the actual call using another device, for example a mobile phone or a desktop phone.

You can see which device you will call with in the bottom left corner of the Telia Touchpoint Flex Softphone. In the following picture the user calls with mobile phone.

Figure 3.2. Call with setting



Click on the icon to choose which device you should call with. You can also configure call with using the **Call > Call with** setting in the Telia Touchpoint Flex Softphone. For example, if you select to call with mobile your mobile phone will ring, pick up the call and the mobile phone will automatically connect to the called party. You can see the call setup progress in the calls view in Telia Touchpoint Flex Softphone.

If enabled, you can also control the remote call from the softphone by calling using the Call Control feature. See [Section 3.16, "Remote call control for calls with another phone"](#) for more information.

You can see whether you have call with or call control capabilities in the bottom left corner device picker. If the title says "Call With" you have call with capabilities and if the title is "Call Control" then you will also be able to control the calls using Telia Touchpoint Flex Softphone.

3.3.5. Callto and Tel URL calls

A callto link or an Tel URL on a web page is a phone number as a link. Callto links and Tel URLs are supported with Telia Touchpoint Flex Softphone. Click a number with a callto or tel link and Telia Touchpoint Flex Softphone will automatically call the number and connect you.



Note

Click the **Handle callto** button to set up the callto: links in the **Advanced settings**. This will open the Default Programs in the Control panel in Windows. Choose the Telia Touchpoint Flex Softphone, then select "Set this program as default". This will configure the application to call numbers when clicking on callto: and tel: links.



Note

If you have Skype installed, it will try to override your callto setting and handle the call with Skype instead of with Telia Touchpoint Flex Softphone. Make sure to start Telia Touchpoint Flex Softphone after Skype is started to solve this problem.

3.4. Receiving A Call

When a call is received, click **Answer Call**  to pick up the call.

You can also answer the call from the icon in the taskbar. Right-click the icon and select **Answer Call**.

You can mute the ring signal of an incoming call.

Click **Mute Ringer**  to mute the ringer.

3.5. Hanging Up or Rejecting a Call

Click **Hangup Call**  to end or reject a call.

You can also reject, or hang up the call from the icon in the taskbar. Right-click the icon and select **Reject** or **Hangup**.

3.6. Holding a Call

It is possible to hold ongoing calls.

1. Click **Hold**  or place a new call using the main window. Placing a new call will automatically put the ongoing call on hold.

The held party will hear music on hold, spoken hold information in your locale, or another prompt depending on configuration in the system.

2. Click **Resume**  to resume a call. If another call is active, clicking **Resume** will automatically put the active call on hold.

3.7. Parking a Call

It is possible to park calls in the personal queue.

1. Click **Park** . The call will be parked in queue. If allowed, other users can also pick up the parked call.
2. Click **Call Pickup**  to pickup the call.

3.8. Transfer a Call

3.8.1. Blind Transfer

Blind transfer allows the calling party to be transferred to another party. When a call is blind transferred, the remote party will be transferred directly. If the transfer fails because of no answer or a busy line the transferred party can connect with the party that transferred the call again.



Note

During a transfer, new incoming calls will be placed in your personal queue, if no other call routing rules apply. You can pick up a new call in the queue by clicking on the pick up button.

To make a blind transfer

1. Click **Call Transfer**  and search or dial the contact to transfer the call to.
2. Click **Transfer**  for the contact to transfer the call to.

To make a blind transfer, bypassing any diversion rules



Note

Transfer with diversion bypass may not be available for all users. The service is only available to users that are authorized to do so.

1. Click **Transfer Options**, select the Bypass Diversion Rules menu item, and search or dial the contact to transfer the call to.

2. Click **Transfer**  for the contact to transfer the call to.

To make a blind transfer to a contacts voicemail



Note

Transfer to voicemail may not be available for all users. The service is only available to users that are authorized to do so.

1. Click **Call Transfer**  and search or dial the contact to transfer the call to.
2. Click **Transfer**  for the contact to transfer the call to then select **Transfer to voicemail** as the number to transfer to.

3.8.2. Attended transfer

Attended transfer makes it possible to transfer a call, while first getting the option to talk to the party where the call is being transferred. If the called party accepts the transfer, the remote party will be connected with the new party and it is possible to leave the call.

1. During a connected call, place another call. The connected call will be placed on hold. Wait for the calling party to answer.
2. Switch back to the first call and click **Call Transfer**  to start transferring the call. Click **Transfer**  to the called party.

It is also possible to drag and drop a call to another in the call panel.

3.8.3. Camp-On

Camp-On is an Attendant functionality which allows you to transfer a call to a busy user. If the user is busy with a call, a personal queue is created, which the transferred call is put on hold in. When the user's first call is ended, the transferred call in the personal queue is connected. See [Section 9.7, "Camp-On"](#) for more information.

3.8.4. Failed transfer

Whenever a transfer or camp-on has failed, you will get notified and can pick up the call again. This could be, for example, if the contact you transferred the call declined to answer. The call will be placed on hold, and the call will flash in the call view of your application to let you know this call requires immediate attention.

3.9. Move to Client

It is possible to move an ongoing call in the application to another client, for example a mobile phone or a desktop phone.

To move a call to another client

1. Select a device from the **Move this call to** list.

2. Click **Move call**  .

3.10. Sending DTMF tones

If you call a voice mail or any other interactive voice response service where telephone tone dialing (DTMF tones) is required, it is possible to open a keypad from the active call panel. You can also use the numeric keypad on your keyboard to send the tones.

Click **Open Keypad**  in the active call panel to open the keypad and click the numbers to send. It is also possible to use the numeric keypad on your keyboard to send the tones.

3.11. Recording a Call

During a call, it is possible to save the conversation to a file. Press **Record**  to start the recording. Press **Stop**  to end the recording.

Click the **Inbox**, go to the **Log** or select **Tools > Inbox** to listen to a recorded call. See [Section 8.2, "Checking messages"](#).

3.12. Conference Calls

3.12.1. Creating a Conference Call

The following steps describe how to set up a local conference call:

To set up a conference call

1. Receive or place a call.
2. When the call is connected, click  .

The Conference call panel is opened, containing the active call. Additional calls can now be added to the conference.
3. Place another call. The active call will be placed on hold.
4. When the new call is connected, click **Add to Conference** to add the call to the conference.
5. Repeat placing new calls and add to the conference to add more participants.



Note

The amount of licences for conferences in the system puts an upper limit on the number of participants that can be added to a conference.

3.12.2. Disconnecting Participants

The Conference Call panel displays all connected participants in the conference. Click for a selected participant to disconnect or to put a participant on hold.

3.12.3. Ending a conference Call

A conference call is ended when the conference organizer disconnects the call, or when all participants has been removed from the conference call. Click **Hangup** to terminate the conference call. The conference organizer will have the option to allow the rest of the participants to continue conferencing when disconnecting. Allowing this will move all other participants to the conference server.

3.13. Log

The log shows placed, received, missed calls, voicemail, recordings and fax messages. The time and duration of the events are also shown. It is possible to place new calls using

call data information from the log. Click  for a call in the log to place a new call.

You can sort the log by all calls, missed calls and inbox items. Click on the sort button for your preferred filter.

- **All** - Show all calls.
- **Missed calls** - Show only missed calls.
- **Inbox** - Show only inbox items.

You can delete all log items shown in your filter. Choose the filter that shows the items you want to delete, and click the bin icon.

You can also delete single log items. Click on an item to expand it and click the bin icon on that item to delete.

To listen to a voicemail or call recording

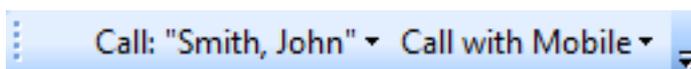
- Click to download the item. It will start automatically to play the voicemail or call recording when the download is finished. You can pause the playback by clicking 

To see a fax message

- Click to download the fax message. The fax message is in pdf format and your preferred pdf reader will be opened automatically to show the message.

3.14. Calling from Microsoft Office Applications

It is possible to click to dial from Microsoft Office applications such as Word, Excel, and PowerPoint. The application installs an add in that is loaded by Microsoft Office. The application must be installed on the computer before the add in can be seen in Microsoft Office. The OutlookAddin.dll file is installed with the application. The add in will appear as a toolbar in Microsoft Outlook.



Note

Call <select a contact> and Call with mobile must be visible on the toolbar in Microsoft Outlook. To activate the Call <select a contact> press the **Contacts** button.

**Note**

The only difference between using the Telia Touchpoint Flex Softphone add-in in Microsoft Office 2003 and 2007/2010 is:

- In Microsoft Office 2003 the add-in will appear on the toolbar.
- In Microsoft Office 2007/2010 the add-in will appear under the Add-Ins ribbon.

To make a call using Microsoft Outlook 2003, 2007 and 2010:

1. Start the Telia Touchpoint Flex Softphone and check that it is running.
2. In the left navigation pane, select the **Contacts** button. The contact numbers can be seen in different views.
3. In the menu bar, select **Call (select a contact)** .
4. Select the phone number to call from the call button drop down menu. The application should appear and start to call the phone number that was selected.

**Note**

If the button is grayed out, the application is not running. To activate it either start the application and click on the **Contacts** button in Microsoft Outlook.

To select different options:

1. Start the Telia Touchpoint Flex Softphone and check that it is running.
2. In the left navigation pane, select the **Contacts** button.
3. Select the device that will be used for subsequent calls. In the drop down menu next to the call <name of contact> there is a button called call with..., select one of the following options:

**Note**

The calling options depend on how the server has been configured. To adjust these options contact the server Administrator.

- Call with Mobile
- Call with SIP desktop phone
- Call with Telia Touchpoint Flex Softphone

To call using the smart tag in a Microsoft Office application:

1. Enter the phone number in the correct format into the selected Microsoft application.
2. Click on the i icon and select the Smart tag Options in the drop down menu.
 - Call: (phone number)
 - (Product name)
 - Remove this Smart Tag
 - Stop recognizing "(phone number)"
 - Smart Tag Options...

3. Place your cursor over the phone number until the i icon appears and in the drop down menu select the option.
4. The Telia Touchpoint Flex Softphone should appear and automatically dial the phone number.

A few examples of accepted phone number formats:



Note

If the i icon does not appear when the cursor is placed over a phone number then the phone number format is not acceptable.

- 08-7687230
- 202 121 2222

If the smart tag option is selected in the drop down menu:

1. Under the tab Smart Tags, check the check box label data with smart tags.
2. Under recognizers check the check boxes that apply (this will differ in Word, Excel and PowerPoint).

To search for a contact in Outlook from the contact list in the Telia Touchpoint Flex Softphone:

1. A user can search for a contact in Microsoft Outlook by going to the Telia Touchpoint Flex Softphone and entering the name of the contact that is being searched for in the dial number field.
2. Enter the first letter of the contacts name of the full name of the contact and hit return. The contact will appear under the Outlook Search Result List. Telia Touchpoint Flex Softphone can pick up contacts from Outlooks contact list.

3.14.1. Setting up the Telia Touchpoint Flex Softphone in Microsoft Word, Powerpoint or Excel

To activate the smart tag option in a Microsoft application:

1. Go to the Microsoft Office icon in the upper left hand corner of your application and click **Office**
2. Click **Word/Powerpoint/Excel Options**
3. In the left navigation bar, select Proofing.
4. In the AutoCorrect window, click on the **AutoCorrect Options**
5. Mark the checkbox **Label text with smart tags**.
6. Mark the checkbox **Call (Softphone+ telephone number smart tag recognizer)**.
7. Click **OK** in the AutoCorrect window.
8. Click **OK** in the Word/Powerpoint/Excel Options window.

To re-enable the softphone add-in:

1. Go to the Tools menu in Microsoft Outlook and select **Trust Center** .

2. In the Trust Center window under the menu on the left, select Add-ins.
3. In the main window look for the application Add-in. If it does not appear in the list then go to the bottom of the list and under Manage in the drop down menu, select **Disabled Items** .
4. Press the Go... button.
5. Select the add-ins that will be enabled and click on the **Enable** button.



Note

Outlook might have to be restarted in order for these changes to take place.

3.15. Volume control

You can control the volume for a call and switch between headset mode and speaker mode from the bottom area of the softphone. You can also mute your microphone by clicking on



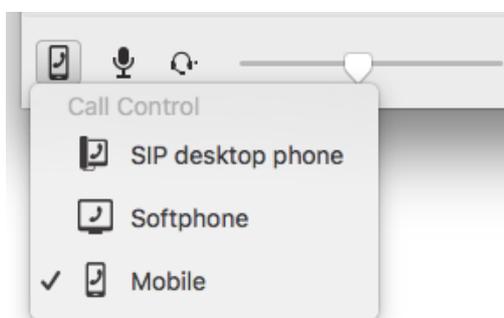
You can also mute the microphone from the dock icon. Right-click the dock icon and select **Mute**. To unmute, select **Unmute**.

3.16. Remote call control for calls with another phone

You can call with another mobile or deskphone, but control the call using Telia Touchpoint Flex Softphone. You initiate the call using Telia Touchpoint Flex Softphone and can control transfers, park/pickups etc. using the UI of the desktop app. After initiating the call on the softphone you need to answer it manually on the device that you want to control. The remote call control feature needs to be enabled by your service provider.

To choose which device to call with or control, click the device icon in the bottom left of your app window. You can see whether you have call with or call control capabilities in the bottom left corner device picker. If the title says "Call With" you have call with capabilities and if the title is "Call Control" then you will also be able to control the calls using Telia Touchpoint Flex Softphone.

Figure 3.3. Remote call control setting



If you call using call with, the call will be initiated as a call-back call and you will have full functionality on the call on the device, but no call control from Telia Touchpoint Flex Softphone. If you call using call control, the call will also be initiated as a call-back call and you will have call control from the Telia Touchpoint Flex Softphone. However, some limitations are

on the capabilities of the call compared to when calling using call with, see [Section 3.16.1, “Supported features and limitations”](#).

To place a call with remote call control:

1. Click .
The server will initiate a call-back call to your selected device.
2. Select the device that you want to call from.
3. Search for a contact, or enter a phone number and place the call as you would normally do.
The server will initiate a call-back call to your selected device.
4. Answer the call on your selected device.
5. The calls view will open up in Telia Touchpoint Flex Softphone and you can control the call from there.

3.16.1. Supported features and limitations

The following features can be performed on a remotely controlled call:

Supported features

- Transfer call
- Park/pickup call
- Hold/resume call

Limitations

- Multiple outbound calls at the same time is not supported
- Calls cannot be parked by remote participant
- Calls cannot be parked if calling to external participant

Chapter 4. Contacts

The Contact list show all your contacts together with presence information. Clicking on a name of a contact will give you more information about the contact.

Your Favourite list is displayed by default and you can search for other directory contacts by start entering their names.

To search for a contact

- Start entering characters. The contact list is updated automatically based on your input.

You can search for contacts by first name, last name, department, any of the custom fields, or a combination. For example, if you want to search for John in Sales, you can enter “Joh Sal” and all contacts that match will appear, including John in the Sales department.

Selecting a contact will open up the detailed view of the contact.

4.1. Favourites, VIPs and Blocked contacts

Your contacts are either normal contacts or one of the following:

- Favourite - a contact that is displayed in your Contacts list when you don't have an active search query
- VIP - a contact, also added to Favourites, that you can add specific call routing rules for. Rules set both for VIP and Favourites will apply to VIP contacts.
- Blocked - a contact that you can add specific call routing rules for

4.2. Adding contacts

Contacts can be added using the application or the user web.

To add a local contact

1. Click **Add Contact** in the toolbar.
2. Enter the contact details and add a phone number. It is possible to add more than one phone number for a contact.
3. Click **Apply** to save the contact information. The contact is added to your contact list.
4. Select if the contact should be added as a Contact, Favourite, VIP or Blocked Contact. You can then set call routing rules depending of the type of contact.

4.3. Removing contacts

Your Favourites list is the default view in Contacts. You can add or remove contacts from the favourites list by clicking on the star/unstar icon for the contact. You can add and remove local contacts to your favourites list. If you want to delete a local contact permanently you can click on the trash bin icon. You can only delete local contacts.

To remove a contact from Favourites

- Click the name of a contact in the Contacts list and then **Unstar** .

To delete a local contact

- Click the name of a contact in the Contacts list and then **Remove this contact**  .

4.4. Edit contacts

You can edit the contact information for contacts you have created. You cannot edit the contact information for contacts within your organization.

To edit a contact

- Click the name of a contact in Contacts and then **Edit this contact**  .

4.5. Exchange calendar

If you are authorized, you can see the Exchange calendar status for your contacts in the contact details. A blue icon will be shown if the user will be busy with a meeting in the next 60 minutes, and a red icon will be displayed if the Exchange calendar shows that the user is busy.

If you are authorized, and the calendar is shared by the user to you, you can also see the user's calendar agenda for the current day.

Chapter 5. Chat, Collaboration and Messaging

5.1. Chat



Note

All users can chat with online users from Contacts. The full collaboration feature with extended chat functionality is available for Collaboration enabled users only.

Instant messages (IMs) are routed to all your available devices for the first message in a chat session. Subsequent messages are routed only to the device on which you reply. For example, if you have an application on your laptop and your mobile phone and receive an IM from user A, both the applications on your laptop and your mobile phone receive the IM. If you reply on your mobile, all future IMs within this chat session with user A will be delivered only to the mobile, and not to the laptop. In addition, all your IMs are only delivered to the device from which user A sent the IMs. However, if you or user A close the conversation window, the chat session ends and any new IM will be routed to all your devices.

You can open a chat window and send IMs to online contacts within your organization. The chat window is divided into three parts: contact details at the top, chat history in the middle and the text input field at the bottom of the window.

To start a chat from the Contacts tab:

1. Go to **Contacts**, select a contact and click **Start chat**  to open a chat window.
2. Enter text in the chat window and press the Return key or click **Send** to send the message.

With the Collaboration feature enabled, you will obtain a set of features for advanced collaboration. It will provide maintained chat history in all devices as well as other tools to improve team work. See further in the section "Collaboration" below.

5.2. Collaboration

Collaboration includes more advanced features like:

- Chat - where all messages are shown. New messages, file uploads etc. are shown here.
- Pages - where pictures, illustrations and other file uploads are stored.
- To-Do - add To-Do lists to share among the members of the chat group.
- Meet - Start ad hoc meetings with the group members.

With the Collaboration feature enabled, you can use the advanced chat feature. You can have an individual chat (with one other user) or a group chat with multiple participants. If MiTeam collaboration is enabled for your organization, you will have access to even more features under the MiTeam tab. For more information, refer to the chapter, "MiTeam: Streams and Meets."

5.2.1. Advanced chat

An advanced chat can be started as an individual chat or a group chat.

5.2.1.1. Individual chat

An individual chat is started in the Contacts view. Whenever the other user has Collaboration capabilities, a new collaboration chat will start. If the other user does not have Collaboration capabilities, a basic chat will start. If a Collaboration session with the other user already exists, it will be continued in the same. Otherwise a new chat session is created.

5.2.1.2. Group chat

An group chat is always started from the Chat tab.

To start a group chat:

1. Navigate to the **Chat** tab.
2. Click the **New** button.
3. Enter a title for the chat.
4. Select participants. (Start by typing a participant's name in the search field, and then select the desired contact from the filtered list of matches that is displayed.)
5. Click **Create** to invite participants and start the chat.
6. Enter your chat message in the **Send message** field at the bottom of the Chat pane, and press **Enter**.



Note

You can insert a new line within your message by pressing **Shift+Enter**.

5.2.1.3. Chat options

The following options are available from the Chat pane:

- Send message - Type a message in the **Send message** field, and press **Enter**.
- Invite member - Click the **Options** icon in the upper-right of the Chat pane, and then click **Invite Member**. Select the participants to add to the chat and then click **Update**.
- Modify chat settings - Click the **Options** icon in the upper-right of the Chat pane, and then click **Settings**. The following chat settings are available:
 - Name - specify a name for the chat
 - Cover Image - upload a custom cover image for the chat
 - Push Notification - select whether to activate push notifications for the chat
 - Send Messages Silently - send chat messages without an audible notification
 - Leave or Delete - leave or delete the chat
- Add file - Click the **Add file (+)** icon in the lower-right of the Chat pane, and select the type of file to add to the chat. (For more information on this feature, refer to the section "Adding files".)

5.2.1.4. Adding files

You can upload files to your chat to share them with members of the chat group. Further options are available for annotating and collaborating with the uploaded files. The following types of files can be added to a chat:

- Desktop - a file from your desktop or any folder on your computer
- Chats/Streams - the contents of another chat or Stream
- Whiteboard - creates a virtual whiteboard within the chat
- Note - activates a text editor where a note can be created within the chat

All members of the chat group can annotate, comment on or modify the files that are added to a chat. Once a file is added, it is also organized under the Pages area for the Collaboration session. Available actions depend on the type of file, but include:

- Annotate and comment
- Create clip
- Download or copy to another chat
- Create To-Do item
- Share
- Undo changes
- Rename or delete file
- View thumbnail images
- Zoom in or out, view in fullscreen mode (Not valid for whiteboard).

5.2.2. Pages

You can use the Pages area to create, add or upload files to a chat or Stream. You and members of your chat group can also create and share annotations on uploaded files, providing you with the ability to collaborate on the content stored within the chat.

Any files that have been uploaded or created within a chat or Stream will be stored in the Pages area. You can also drag and drop files directly to the Pages area, and create folders to organize your uploaded content. For example, you may want to keep images and documents in separate folders, or organize content about a particular topic.

To add a file:

- Drag and drop the desired file directly to the Pages area, OR
- Click the **Add file (+)** icon in the lower-right corner of the Pages area, and select the type of item to add (Desktop, Chats/Streams, Whiteboard or Note).

All members of the chat group can annotate, comment on or modify the files that are added to the Pages area.

To add a folder:

1. Click **New folder**.
2. Type a name for the folder, and click **Create**.

Files within the chat or Stream can be moved to the folder.

To move a file:

1. From within the Pages area, click the **Info** icon on the lower-right corner of the thumbnail image for the file.
2. Select **Move to**, and then select the chat or Stream to which you want to move the file.

Hint: if a chat or Stream has folders, an arrow icon will appear next to the name of the Stream or chat. If desired, click the arrow and select the folder to which you want to move the file.

3. Click **Move**.

5.2.3. To-Do

You can use the To-Do feature to create, organize and assign tasks among members of a chat group. Your team's tasks are kept in one place, so that everything is actionable and transparent.

To create a To-Do list:

1. Select the chat for which you want to create a to-do list, and click **To-Do**.
2. In the **Add a To-Do item** field, type the text for your first To-Do item, and click **Enter**. The item now appears in your To-Do list, and is available for editing by any member of your chat group.
3. Enter additional items as needed.

The following actions are available from within the To-Do list, for any member of the chat group:

- Search - In the **Search To-Do** field, you can enter a search string. This filters the list to show only items containing the text that you enter.
- Sort - By default, the list shows all To-Dos. You can select the dropdown to view all To-Dos, items that are assigned to you, items that are unassigned, or items that are assigned to a specific member of the chat group.
- Mark an item as completed - Click the checkbox beside the list item.
- Flag the item as important - click the flag icon beside the list item. Items flagged as important will appear at the top of the list.

If you click on an individual list item, the following actions are also possible:

- Assign an item to a member of the chat group - Click **Assign to**, and select the member to whom the item should be assigned.
- Set a due date for the item - Click **Set due date**. From the calendar pop-up, select the date and time by which the item must be completed.
- Set a reminder - Click **Remind me**. From the calendar pop-up, select the date and time you want to be reminded.
- Add an attachment - Click **Add attachment**, and navigate to select the item you want to add. (You can add content from a Chat or Stream or a file from your computer.)

- Copy or move the item to another list - Click **Copy/Move**, and then select **Copy To** or **Move To**. You now have the following options:
 - Select the chat or Stream to which you would like to copy or move the item, OR
 - Click **Start a new conversation** to create a new conversation with the copied or moved item.
- Delete an item - Click **Delete**.
- Add a description - In the **Add description** field, enter a description of the To-Do item.
- Add a comment - In the **Add a comment** field, enter a comment about the To-Do item.
- Mark an item as completed - Click the checkbox next to the name of the To-Do item.
- Flag an item as important - Click the flag next to the name of the To-Do item.

To return to the list view, click the right-arrow icon to close the detailed actions pane.

5.2.4. Meet

From within an existing chat, you can use the Meet feature to start an ad hoc, online meeting with members of a chat group. A Meet is a real time collaboration tool, with or without voice and video, with the possibility to do screen and file sharing.



Note

Voice communication is handled separated from the video stream and the voice icon within the video share is disabled.

To start a one-to-one ad hoc Meet inside a chat:

1. Select the chat from which you want to start the meeting, click **Meet** and then click **Meet Now/guilabel>**.
2. Select the type of meeting you want to initiate:
 - **Voice call** - initiates a voice call in the Softphone application.
 - **Web meet** - initiates a collaboration session in your default Web browser, with video capability as well as the ability for file and screen sharing.
 - **Voice + web** - initiates a collaboration session with an instant voice bridge.

To start an ad hoc Meet with team members inside a chat:

1. Select the chat from which you want to start the meeting, click **Meet** and then click **Meet Now**.
2. Select your preferred way to start the ad hoc meet:
 - **Dial in** - initiates a voice call in the Softphone application.
 - **Open web** - initiates a collaboration session in your default Web browser, with video capability as well as the ability for file and screen sharing.
 - **Dial in + open web** - initiates a collaboration session with an instant voice bridge.

Participants may leave the Meet while it is still ongoing but the Meet invitation will remain until the initiator has ended the Meet.

To join an ad hoc Voice meeting:

- Answer the voice call in your Softphone application (one-to-one conference), OR
- Click the handset icon to connect with the voice bridge (multiple participants).

To join a Web or Voice+Web meeting:

1. If the meeting is a Voice+Web meeting, click the handset icon to connect with the voice bridge.
2. From the invitation in your chat list, click **Join**.

**Note**

When you join a Web meet for the first time, you may be prompted to install a plugin for your Web browser. Depending on your browser, the plugin may be downloaded automatically or you may be directed to an online store to download the plugin.

5.3. Messaging

5.3.1. SMS messages

You can send SMS messages to contacts and phone numbers with the application. You can send SMS message to one or many contacts.

You can also change the from number of the SMS message to a function number or ACD number, if you are authorized. This could be used if, for example, you want to send an SMS message from the ACD group instead of your own personal phone number.

To send an SMS message to a contact:

1. Select a contact and click **Send SMS** .
2. Choose the number to which you want to send the SMS message, if there is more than one number to choose from.
3. Choose the number from which you want to send the SMS message, if there is more than one number to choose from.
4. Enter your message and click **Send**.

To send an SMS message to a group:

1. From the toolbar, select **Services > Send message to listed contacts**, then select **SMS**.
The contacts in your current search with a mobile phone will be added to your messaging screen.
2. Choose the number on the contacts to which to send the message to by clicking on the dropdown list. You can remove any contacts you do not want to send the message to by clicking **x** next to the contact.
3. Enter your message and click **Send**.

5.3.2. Email messages

The first time you use this service you will set whether you are using Microsoft Outlook or another email application. This is to configure whether to use semi-colon or comma to separate the addresses.

To send an email message to a group:

1. From the toolbar, select **Services > Send message to listed contacts**, then select **email**.

The contacts in your current search with an email address will be added to the To: field in your default mail application.

2. Enter your message and send it using the usual procedure in your email application.

Chapter 6. MiTeam: Streams and Meets

From the MiTeam view, you can create collaboration sessions with your team members, including participants from outside your organization. These sessions - called Streams - provide advanced tools for team interaction as well as the ability to schedule Meets. A Meet is a conference that can be Voice only, Web only or Voice and Web.

In the MiTeam view you can create new Streams as well as Meets. Streams are intended for long-term collaboration, as opposed to Chat sessions, which are more ad hoc oriented. The MiTeam view lists your current Streams and Meets. This includes Streams and Meets you have created yourself, accepted to be a participant in or that you are invited to join. A Meet that is about to start within 10 minutes will appear at the top of the list.

6.1. Streams

To create a new Stream:

1. Click the **Plus sign** icon on the left side menu.
2. Click **Create a stream**.
3. Enter a title for the Stream.
4. Search and select contacts by typing the name in the search field to get auto-fill options.
To invite external participants, enter e-mail address, or phone number.
5. Click **Create**.

The other participants are automatically invited to your Stream.

From within a Stream, you have access to the following collaboration features:

- Chat - where all messages are shown. New messages, file uploads etc. are shown here.
- Pages - where pictures, illustrations and other file uploads are stored.
- To-Do - add To-Do lists to share among the Stream participants.
- Meet - Start ad hoc meetings or schedule meetings with the Stream participants.

6.1.1. Stream options

The following options are available from the Stream pane:

- Send message - Type a message in the **Send message** field, and press **Enter**.
- Invite member - Click the **Options** icon in the upper-right of the Stream pane, and then click **Invite Member**. Select the participants to add to the Stream and then click **Update**. Participants can be added as editors (with the ability to collaborate) or viewers (read-only).
- Modify Stream settings - Click the **Options** icon in the upper-right of the Stream pane, and then click **Settings**. The following settings are available:
 - Name - specify a name for the Stream

- Cover Image - upload a custom cover image for the Stream
- Category - enter a category for the Stream
- Push Notification - select whether to activate push notifications for the Stream
- Send Messages Silently - send messages without an audible notification
- Download - Download a screenshot from the Stream
- Leave or Delete - leave or delete the Stream
- Add file - Click the **Add file (+)** icon in the lower-right of the MiTeam pane, and select the type of file to add to the Stream. (For more information on this feature, refer to the section "Adding files".)

6.1.2. Chat

To start a chat within your Stream:

1. Navigate to the Chat pane.
2. Type your message in the **Send message** field at the bottom of the pane.

6.1.3. Adding files

You can upload files to your Stream to share them with members of the Stream group. Further options are available for annotating and collaborating with the uploaded files. The following types of files can be added to a Stream:

- Desktop - a file from your desktop or any folder on your computer
- Chats/Streams - the contents of another chat or Stream
- Whiteboard - creates a virtual whiteboard within the Stream
- Note - activates a text editor where a note can be created within the Stream

All members of the Stream group can annotate, comment on or modify the files that are added to a Stream. Once a file is added, it is also organized under the Pages area for the Stream. Available actions depend on the type of file, but include:

- Annotate and comment
- Create clip
- Download or copy to another chat
- Create To-Do item
- Share
- Undo changes
- Rename or delete file
- View thumbnail images
- Zoom in or out, view in fullscreen mode

6.1.4. Pages

You can use the Pages area to create, add or upload files to a Stream. You and members of your Stream group can also create and share annotations on uploaded files, providing you with the ability to collaborate on the content stored within the Stream.

Any files that have been uploaded or created within a Stream will be stored in the Pages area. You can also drag and drop files directly to the Pages area, and create folders to organize your uploaded content. For example, you may want to keep images and documents in separate folders, or organize content about a particular topic.

To add a file:

- Drag and drop the desired file directly to the Pages area, OR
- Click the **Add file (+)** icon in the lower-right corner of the Pages area, and select the type of item to add (Desktop, Chats/Streams, Whiteboard or Note).

All participants with Editor access to the stream can annotate, comment on or modify the files that are added to the Pages area.

To add a folder:

1. Click **New folder**.
2. Type a name for the folder, and click **Create**.

Files within the Stream can be moved to the folder.

To move a file:

1. From within the Pages area, click the **Info** icon on the lower-right corner of the thumbnail image for the file.
2. Select **Move to**, and then select the chat or Stream to which you want to move the file.

Hint: if a chat or Stream has folders, an arrow icon will appear next to the name of the Stream or chat. If desired, click the arrow and select the folder to which you want to move the file.

3. Click **Move**.

6.1.5. To-Do

You can use the To-Do feature to create, organize and assign tasks among participants in a Stream. Your team's tasks are kept in one place, so that everything is actionable and transparent.

To create a To-Do list:

1. Select the Stream for which you want to create a to-do list, and click **To-Do**.
2. In the **Add a To-Do item** field, type the text for your first To-Do item, and click **Enter**. The item now appears in your To-Do list, and is available for editing by any participant in the Stream.
3. Enter additional items as needed.

The following actions are available from within the To-Do list, for any participant in the Stream:

- Search - In the **Search To-Do** field, you can enter a search string. This filters the list to show only items containing the text that you enter.
- Sort - By default, the list shows all To-Dos. You can select the dropdown to view all To-Dos, items that are assigned to you, items that are unassigned, or items that are assigned to a specific participant.
- Mark an item as completed - Click the checkbox beside the list item.
- Flag the item as important - click the flag icon beside the list item. Items flagged as important will appear at the top of the list.

If you click on an individual list item, the following actions are also possible:

- Assign an item to a participant - Click **Assign to**, and select the participant to whom the item should be assigned.
- Set a due date for the item - Click **Set due date**. From the calendar pop-up, select the date and time by which the item must be completed.
- Set a reminder - Click **Remind me**. From the calendar pop-up, select the date and time you want to be reminded.
- Add an attachment - Click **Add attachment**, and navigate to select the item you want to add. (You can add content from a Chat or Stream or a file from your computer.)
- Copy or move the item to another list - Click **Copy/Move**, and then select **Copy To** or **Move To**. You now have the following options:
 - Select the chat or Stream to which you would like to copy or move the item, OR
 - Click **Start a new conversation** to create a new conversation with the copied or moved item.
- Delete an item - Click **Delete**.
- Add a description - In the **Add description** field, enter a description of the To-Do item.
- Add a comment - In the **Add a comment** field, enter a comment about the To-Do item.
- Mark an item as completed - Click the checkbox next to the name of the To-Do item.
- Flag an item as important - Click the flag next to the name of the To-Do item.

To return to the list view, click the right-arrow icon to close the detailed actions pane.

6.2. Meets

From the MiTeam tab, a Meet can be initiated either as ad hoc or scheduled. It is also possible to include participants from outside your organization.

To start an ad hoc Meet with team members inside a stream:

1. Select the stream from which you want to start the meeting, click **Meet** and then click **Meet Now**.
2. Select your preferred way to start the ad hoc meet:
 - **Dial in** - initiates a voice call in the Softphone application.
 - **Open web** - initiates a collaboration session in your default Web browser, with video capability as well as the ability for file and screen sharing.

- **Dial in + open web** - initiates a collaboration session with an instant voice bridge.

You can invite guests to join a scheduled Meet using their email address. Guests can be both internal users within your organization without the Collaboration license and external users outside your organization. Guests will be able to access the Meet in a Web browser.

Schedule a Meet inside a Stream:

1. Click the **Plus sign** icon on the left side menu.
2. Click **Schedule a meet**.
3. In the Scheduler dialog:
 - Insert Title.
 - Set the start Date, or click **Now**.
 - Set Duration.
 - Set Repeat sequence if applicable.
 - Select Timezone.
 - Link with stream. Start typing to get auto-fill options.
 - Search and select contacts by typing the name in the search field to get auto-fill options.
To invite external participants, enter e-mail address, or phone number.
 - Write an invitation Note. The text will be displayed in the invitation email and calendar event.
 - Set the preferred meeting reminder time to the calendar invitation.
 - Set the preferred time for SMS text message reminder.
 - Click **Schedule**.

The details of your Meet, including dial-in numbers, are displayed.

To create a scheduled Meet outside a Stream:

1. Click the **Calendar** icon at the top-left of the Stream pane.
2. Select **Create a Meet**.
3. In the Scheduler dialog:
 - Select the start and end date and time plus time zone.
 - Set recurrence (Repeat) when applicable.
 - Search and select contacts by typing the name in the search field to get auto-fill options.
To invite external participants, enter e-mail address, or phone number.
 - Write an invitation note. The text will be displayed in the invitation email and calendar event.
 - Set the preferred meeting reminder time to the calendar invitation.

- Set the preferred time for SMS text message reminder.
- Click **Create**.

The details of your Meet, including dial-in numbers, are displayed in the Streams list.

To join a scheduled Meet (internal users):

1. In the MiTeam list view, click the **Info** icon next to the name of the Stream. A list of scheduled Meets for the Stream is displayed.
2. Click handset icon in the Meet item to join the voice conference.
3. The invitation to the Web Meet is displayed. To join, click the **Web Meet** (globe) icon.

To join a scheduled Meet as a guest:

1. Call the Meeting number provided in the meeting invitation and enter the meeting ID number when prompted.
2. Follow the link provided in the meeting invitation to join the Web meeting.



Note

If you join a Web meeting as a guest, the session expires after 8 hours. To rejoin the Web meeting, return to the meeting invitation and click the link again.

To delete a scheduled Meet:

- If the Meet is about to start within 10 minutes, select it in the Stream time line and then click **Delete** in the details view.
- If it occurs later:
 1. Click the Calendar icon, then select **View all meets**.
 2. Click the **Info** icon for the desired meeting.
 3. Click **Delete**.

To edit a scheduled Meet:

- If the Meet is about to start within 10 minutes, select it in the Stream time line and then click **Edit**.
- If it occurs later:
 1. Click the Calendar icon, then select **View all meets**.
 2. Click the **Info** icon for the desired meeting.
 3. Click **Edit**.
- Change the details as required and click **Update**.

To leave a Stream:

1. Click the **Info** icon and then click **Leave stream**.
2. Confirm leaving the Stream.

**Note**

Only participants (not owner) of a Stream have the option to leave.

When leaving a Stream, all Meets scheduled by the participant in the Stream will also be cancelled.

To remove (delete) a Stream:

1. Click the **Info** icon and then click **Delete stream**.
2. Confirm removal of the Stream.

**Note**

A Stream can only be removed by the owner (the user who created it).

When removing a Stream, all Meets scheduled by the owner will also be cancelled.

Chapter 7. Settings

7.1. Presence

As a user in the system, you can select between different activities and roles available in the system. For example, if you want to have your calls routed to a specific phone when you are out of office, it is possible to set a specific role and activity matching the case. Activities and Roles are defined and configured by the system administrator.

7.1.1. Activities

The presence state for an Activity can either be Available  or Unavailable .

Depending on system settings, certain users or user groups may not be able to see the presence state for all other users or user groups.

To set an activity:

- Click on the Activity text and select a new activity from the drop down list or select **Set activity and end time**.

The following default activity types are available:

- Available
- Busy
- Lunch
- Meeting
- Out of office
- Vacation

How incoming calls are routed depending on your activity can either be defined by your system administrator or if you are an authorized user you can manage your own settings. See [Section 8.4, "Configuring Call Routing"](#)

7.1.1.1. Presence shortcut

You can configure your own presence shortcuts. The created presence shortcuts will be synchronised to all your devices. The presence shortcut is a quick way to set your presence with an end time.

To add a new or edit a shortcut

1. Click your activity
2. Click **Edit shortcuts...**
3. Click **+** to add a new or click a current one to edit it
4. Edit the shortcut with the following fields:
 - Name - Name of your shortcut
 - Activity - Your activity

- Availability - If your state should be available (green) or Do not disturb (red)
- Duration - Your end time. This can be either no end time, until next workday (calculated based on your working hours) or a set time period from 15 minutes to 1 day. The time is approximate and will adjust to closest 5 min - hour based on duration length.
- Activity diversion - If you should override any diversion state. There are a few options:
 - **Use default diversion** - The active diversion will be the one mapped to the activity if such mapping exist, or another previously set diversion. Active diversion will be the activity diversion or previously set diversion if one of them is set, otherwise no diversion.
 - **Clear default diversion** - The will clear any previous set diversion. Active diversion will be no diversion.
 - **Override default diversion** - The active diversion will be the number set in the Diversion number field.
- Diversion number - Set the number to divert to. If this is empty and Activity diversion is marked any previous set diversion will be overridden and set to no diversion.
- Icon - Choose an icon. It will only be visible to you.



Note

If you have greyed out shortcuts this means that the activity mapped to the shortcut no longer exists on the system. Edit the shortcut and choose a valid activity.

7.1.1.2. Custom Activity

A custom activity will let you set a new active activity, availability, end time and activity diversion.

See Presence shortcuts for information on the different options.

7.1.1.3. Future presence

You can schedule future presence events. See [Section 8.5, "Future presence"](#) for more information.

7.1.1.4. Activity diversion

You can configure activity diversions that will automatically divert calls to your number based on your activity.



Note

You need to have a call routing rule that direct received calls to active diversion number to make any diversion happen.

To add an activity diversion

- Click on +
- Select your activity
- Set a number to divert to
- Click **Save**

7.2. Personal Note

It is possible to edit a personal note that will be visible to other users within the organization. Click the Note text in the live aid area to change your personal note.

7.3. Changing another user's presence information

You can change the presence information regarding activity, role, future presence and change the personal note if you have the authorization for it.

To change another user's Activity

1. Select the user.
2. Click on the Activity message.
3. Select the new activity, or select **Set activity and end time** to set an end time to the activity.

To change another user's role

1. Select the user.
2. Click on the role.
3. Select the new role.

To change another user's future presence

1. Select the user.
2. Click on the Activity message.
3. Select **Future presence...** from the menu to see and set the future presence for the user.

To change another user's personal note

1. Select the user.
2. Click on the personal note.
3. Enter the new message.

7.4. Overriding Nightmode

The **Override Nightmode** menu option gives the possibility to extend the office hour function of call routing by two hours. If the system has been configured for night mode, calls may not be routed in the same way as during normal working hours. This option is only available for authorized user defined by your System Administrator.

7.5. Options

The options menu is divided into four areas; account settings, audio settings, general and advanced settings. The options menu is reached by selecting **Tools > Options** in the menu.

7.5.1. Account

- Logout - will log you out from the application and will take you to the activation screen.

7.5.2. Audio Profile Settings

The Audio Profile Settings let you configure your audio settings when using the application as a speaker phone, or with a headset. You can also configure a custom ringtone.

7.5.2.1. Speaker profile

The Speaker Settings tab is used to configure the sound devices the application will use in the Speaker Profile. Use the Speaker Profile when using your computer as a speaker phone.

You can select the audio devices that should be used in the Speaker Profile. We recommend to select the audio device that is connected to the computer speakers.

7.5.2.2. Headset profile

The Headset Settings tab is used to configure the sound devices the application will use in the Headset Profile. Use the Headset Profile when using your computer with a headset.

You can select the audio devices that should be used in the Headset Profile. For Input and Output, select the audio device that is connected to the computer's headset. This audio device typically belongs to a connected USB headset. For the Ringer device, select an audio device that is connected to the computer speakers.

7.5.2.2.1. Supported headsets

The application work with most headsets, USB connected or wireless. However, if you also want to use features (apart from volume control) from a headset to control the calls, headsets from Plantronics and from Jabra are supported. Plantronics headset support is included for PC and Mac and Jabra headset support is included for PC. Note that Plantronics does not support Bluetooth connection with PC or Mac and that Jabra headsets are not supported on Mac. Depending on headset model you will get different supported features. All headsets support answering call, hanging up a call and receiving a second incoming call. Depending on model you can also get functions such as reject call, hold, swap between ongoing calls, mute, ringtone in headset, caller ID in addition to the headset volume control.

The headset SDK implementation is towards Plantronics Hub 3.8 (PC+Mac) and Jabra Direct version 3.0 (PC), so basic functionality for all headsets that have support for those SDKs should work.

7.5.2.3. Audio settings

The following settings are configured for each profile:

- Input audio device (the audio device to which the microphone is connected to)
- Output audio device (the audio device to which the speaker or headphone is connected to)
- Ringer audio device (this audio device will be used to play ring signals).



Note

The ringer audio device should not be connected to headphones since ringing signals will not be heard unless the headphones are worn.

7.5.2.4. Ringtone

You can set a custom ringtone to differentiate your phone from the other phones in the office.

To change the ringtone

1. Select **Tools > Options** and click the Ringtone drop down-list.

2. Select **Choose**, to browse for a new ringtone.



Tip

You can press the play button next to the drop down-list to listen to your current ringtone

7.5.3. General settings

The general settings can be found by clicking **Tools > Options** .

7.5.3.1. Automatically start when the computer starts

This setting allows the application to be started when the computer is powered on. Autostart is selected by default.

7.5.3.2. Automatically answer incoming calls

This setting makes it possible to have the application answer incoming calls automatically without any active interaction from the user. When in call, the calling party is placed in a queue or will hear a line busy tone depending on server configuration.

7.5.3.3. Integrate with Microsoft Outlook

Mark the checkbox if you want to integrate the softphone with Outlook 2003/2007/2010. This will let you get search results from Outlook. Incoming calls will also be matched against contacts in Outlook.

7.5.3.4. Popup for incoming call

This setting makes the application to pop up in the foreground for incoming calls.

7.5.3.5. Configure keyboard bindings

Pressing the **Keyboard** button will open the Keyboard bindings dialog. This dialog shows all current keyboard shortcuts. It is also possible to reassign keyboard shortcuts for all the commands.

7.5.4. Advanced Settings

7.5.4.1. Handle Callto and Tel URL calls

Callto links and Tel URLs on web pages are supported with Telia Touchpoint Flex Softphone. Click a number with a callto or tel link and the application will automatically call the number and connect you.



Note

If you have Skype installed, it will try to override your callto setting and handle the call with Skype instead of with Telia Touchpoint Flex Softphone. Make sure to start the application after Skype is started to solve this problem.

7.5.4.2. Use F8 to dial the selected number

Mark the checkbox if you want to call a selected number using the softphone just by pressing F8. The softphone filter out non-valid characters automatically.

7.5.4.3. Show queue information in standard view

Mark the checkbox if you want to show your group buttons and your queue information in Standard view.

7.5.4.4. Automatic adjustment of microphone gain

Mark the checkbox if you want to have automatic adjustment of microphone gain. This can prevent getting unwanted audio feedback.

7.5.4.5. Show extended search information

This will highlight the match on your search results so you see why the Contact appears in your search. This is only available when logged into an attendant group.

7.5.4.6. Play sound for second incoming call

Play sound for second incoming call if you already are in a call.

7.5.4.7. Show extended target information in attendant view

This will enable extra information in the call item with information on whom the caller tried to reach. For example, A user calls a person and ends up in the voicemail where the possibility to press 1 to reach an attendant is played and used. Enabling extended target information will then for the attendant picking up the call also publish in the call item from whom the caller was diverted from.

This is only available when logged into an attendant group and using the attendant view.

7.5.4.8. Enable monitored calls and call control

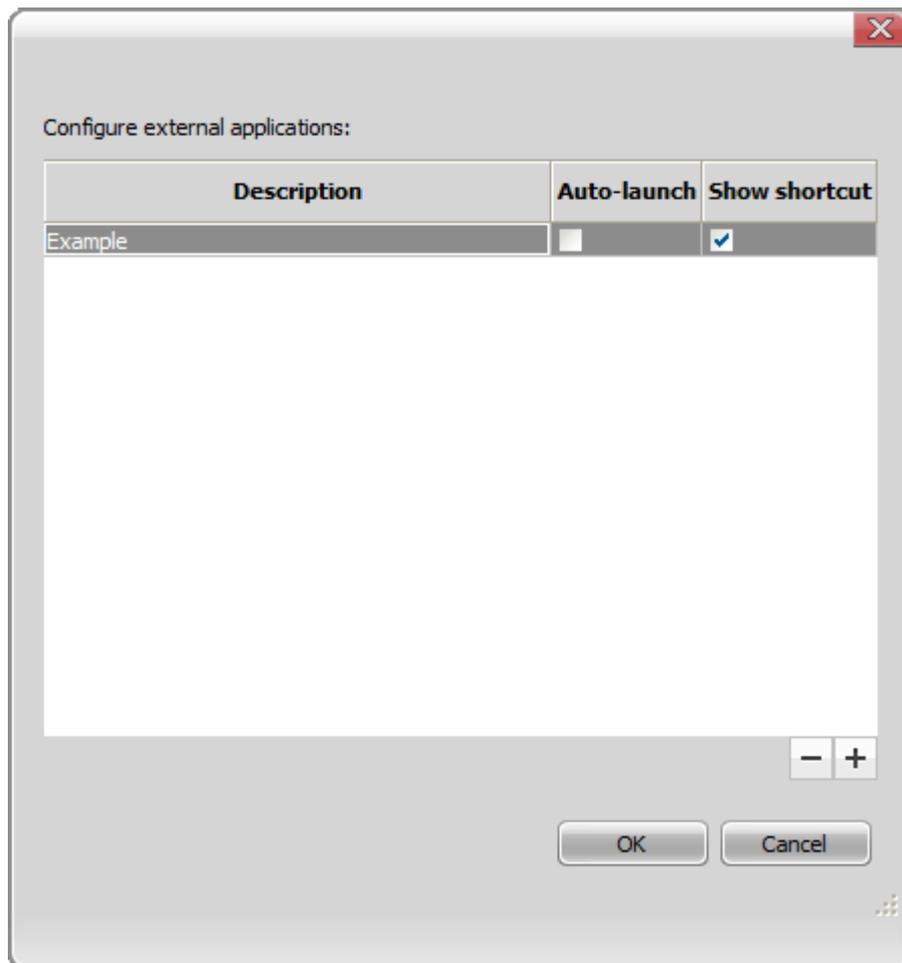
This enables monitoring of your own ongoing calls, regardless of device. You can also start and control calls made from another device from the application.

The following call activities are available:

- Start
- Hold
- Park
- Transfer
- Hang up
- Move to other device

7.5.4.9. Configure external applications:

You can configure external applications that will can be launched from within the application. You can configure so that the application automatically launches on every incoming call or so that you manually launch the application from the call. To configure external applications go to **Settings** > **Advanced** > **External....**



Use the +/- buttons to add or remove an External application.

7.5.4.9.1. Configuring your external application

To configure your external application, Double click the application you want to edit.

Please enter information for the application:

Enter a description:

Enter the launch URI:

You can use `${CALLINGNAME}`, `${CALLINGNUMBER}`, `${METATEXT}` and `${TRANSFERREDBY}` and these values will be exchange to real values when receiving a call

Regular Expressions:

You can apply regular expressions to the variables below. Use the test value parameter to test the URI. The result is shown in the result window below.

Variable	Match expression	Replace expression	Test value
<code>\${CALLINGNAME}</code>			
<code>\${CALLINGNUMBER}</code>			
<code>\${METATEXT}</code>			
<code>\${TRANSFERREDBY}</code>			

Your URI based on the test values:

OK Cancel

Every application needs a name and a launch URI. The launch URI will be used when trying to launch the application. For instance, launching a web browser use the http URI. `http://www.google.com`. There are four special strings that you can use in your launch URI. These special strings will be exchanged to the real value when there is an ongoing call.

Select the **Auto-Launch** option to make the application launch when receiving a call. Select the **Show shortcut** option to make the application shortcut appear in every call.

- `${CALLINGNAME}`. This will be exchanged to the name of the calling person.
- `${CALLINGNUMBER}`. This will be exchanged to the number of the calling person.
- `${METATEXT}`. This will be exchanged to any Meta information available in the call for an ACD or Attendant queued call.
- `${TRANSFERREDBY}`. This will be exchanged to information if this call was transferred by anyone. It will be the name if the name is available otherwise the number.



Note

If the value isn't available in the current call the special string will be removed. However any other information will still be there. For instance `http://`

`www.telepo.com?meta=$METATEXT` will be `http://www.telepo.com?meta=` if there is no METATEXT information.

7.5.4.9.2. Rewriting the values and testing

At the bottom of the configuration page there is a section where you can re-write the values. For instance if your external application expects all numbers in national format but you know that all incoming calls are in international format you can use these fields to re-write the values. You can use normal Regexp expression in the **Match expression** field. In the **Replace expression** you put what value you want to replace it with. As an example, to exchange Swedish numbers from an international format to national format use the `\+46` value in the **Match expression** field and a `0` in the **Replace expression** field.

The **Test Value** field can be used to test your expressions. Enter a value that you want to test. The resulting URI will be shown at the bottom.

7.5.4.10. Edit call message templates

Pressing the **Templates...** button will open the Edit call message templates dialog. With this dialog you can change the default call message templates for email and SMS. You can also reset the messages to its default values if needed. See also [Section 9.10, "Send email and SMS to a contact using call message templates"](#) for more info on how and when to use this.

7.5.4.11. Email application

Choose whether to use "Microsoft Outlook" standard (semi-colon) or "Other" generic standard (comma) of separating email addresses when sending group emails.

Chapter 8. Toolbar functions

8.1. Home

Clicking Home opens a web browser and the option to log on to the Telia Touchpoint Flex Web. The Telia Touchpoint Flex Web contains different settings related to:

- Presence status - change settings for activities and roles
- Changing password - change your own password used to log in to the system.
- Overriding Nightmode
- Service configuration - call recording, call routing, fax and voice mail settings
- Conferencing configuration
- Contacts settings
- Log

Several of the settings are available as shortcut options from the toolbar.

8.2. Checking messages

The inbox contains all your messages in the system. The inbox is a filter in your Log. The messages can be either voice mail, fax, or recordings.

To play or read a message

- Click the message.

To delete a message

- Select a message and click **Delete selected**.

8.3. Booking Conferences

The Conferences page is where you can schedule a voice meeting by inviting multiple participants to the call. The page lists all meetings that have been scheduled.

To join an ongoing meeting

- Click **Join meeting** . You will automatically join the conference. If you select another answerplace in the dropdown, the server will instead call you up on your selected phone and join the conference.

You can also click on a meeting, call a meeting dial in number and then enter the Meeting ID.

To add a new meeting

1. Click **Add meeting** .
2. Enter a name for the meeting.

3. Select the start date, start time and meeting duration. The meeting timezone is your default timezone. Check so that the meeting is booked in your preferred timezone.
4. If the meeting is recurring, select the recurrence in the **Repeat** drop-down-list.
5. Set your preferred meeting reminder time to the calendar invitation.
6. Set the time for the SMS text message reminder.
7. Click **Add participant** .
8. Enter email, phone number or user's name to search for a participant. Click on the name to add the contact to the meeting.

You can also click **Add external participant** if your preferred contact does not show up in the list. Enter first name and phone or email to add the contact to the meeting. You can mark the checkbox **Remember contact** if you want to remember the contact information for other meetings.



Tip

You can remove a contact from the participant list by first clicking on the contact's icon and then on **Remove** , or by clicking **Remove participants** and then clicking on the participants to remove.

9. Write an invitation note. The text will be displayed in the invitation email and calendar event.
10. Click **Send invitations** to send email invitations via the server. The email contains the details of the meeting and how to dial in.
11. Click **Close** to close the meeting details.

To delete a meeting

1. Click on a meeting.
2. Click **Remove** .
3. **OK** .

8.4. Configuring Call Routing

The call routing rules are used to define how the system handle calls. Call routing rules are set on the organization and group level and can also be set on the user level. Rules set on the organization and group level are inherited by the user level and can be seen on the call routing page.



Note

Depending on authorization settings on the organization and group level, you might not have permission to override inbound and outbound rules.

The following types of call routing rules can be defined:

- **Inbound rules** - These rules are used to control how an incoming call is handled. This is where the association between personal phone numbers and personal phones are defined, that is, controlling which of the available phones that should ring when a call is received to the personal number.

- **Outbound rules** - These rules control how the system should behave when a call is placed. For example to control which number that should be presented as a calling party number. If no outbound rule exists the system will set the calling party number to private.
- **Fallback rules** - These rules control how incoming calls which cannot be connected are handled. For example if the called party is busy the call may be diverted to voice mail.

8.4.1. Inbound Rules

Click **Add** to insert a new inbound rule. Follow the instructions on screen to build a new rule with matching criteria and actions.

Table 8.1. Inbound rules match criteria

Match Criteria	Description
Activity	To match the current presence activity when the call is received. For example, when an activity is set to meeting a rule to forward calls to voice mail can be created.
Availability	To match the current availability when the call is received. For example, when an unavailable activity is set a rule to forward calls to voice mail can be created.
Call is tagged	To match against what the call is tagged with. This is mainly a technical rule.
Call's destination	To match against line type set on the primary and secondary line.
Calling party	To match the type of calling party. This can be: internal, external, favourite, blocked, VIP. This allow rules treating callers differently. VIP contacts match rules both for VIP and for favourites.
Call's destination is tagged	To match against what the call's destination is tagged with. This is mainly a technical rule.
Call's source is tagged	To match the call's source towards a list of tags. This is mainly a technical rule.
Date	To match a date. The possible values are before, after or a specific date.
Day of week	To match a weekday. It is possible to specify "is" or "is not" and then provide the day of week.
Diverted	To match on calls that have been diverted by one user to another number while using the "Enter number:" setting. A call forked to a user's own devices is not considered a diversion.
Dialing number	To match the dialed number against a set of defined number types, for example international or mobile.
Incall	To match the call status. Possible values are true and false. This rule allows specifying what should happen if you are busy on a phone when receiving a call.

Match Criteria	Description
Nightmode	To match the Nightmode state. Possible values are True and False. This rule allows specifying what should happen when Nightmode is active or not. For example, should calls be forwarded to a mobile when a call is received during Nightmode.
Role	To match the current presence role when the call is received. This rule allows for example, forwarding calls to attendant if role is set to private. Possible values are the roles configured for the organization.
Time	To match a time value. Possible values are before or after a specified time.

Inbound rules actions defines destinations where to forward the call. Some of the destinations allow multiple destinations to be specified. It is also possible to define the delay when the call will be redirected to other destinations. The following inbound rule actions are available:

Table 8.2. Inbound Rules Actions

Action/Destination	Description (If the rule is matched...)
Desktop phone	the call should be forwarded to the desktop phone.
Lync application	that call should be forwarded to the lync application.
Analog phone	the call should be forwarded to an analog phone.
Mobile phone	the call should be forwarded to the mobile phone.
Queue	the call should be forwarded to the personal queue. This action is typically used in conjunction with the Incall match criteria. It is only possible to distribute a call that has been in a personal queue to internal extensions. If a rule with an external number distribution is available the call will not be distributed to the external number.
Active diversion number	the call should be redirected to the redirect number set by the feature code. Rules containing this action will only match if an active call diversion set by a feature code exists.
Telia Touchpoint Flex Softphone	the call should be forwarded to the Telia Touchpoint Flex Softphone.
Switchboard	the call should be forwarded to the switchboard number.
Voicemail	the call should be forwarded to the voicemail inbox.
Voicemail play activity	the call should play current activity and then call forwarded to the voicemail.
Voicemail play busy in call	the call should play activity busy in call and then call forwarded to the voicemail.

Action/Destination	Description (If the rule is matched...)
Voicemail play out of reach	the call should play activity out of reach and then call forwarded to the voicemail.
Enter phone number...	the call should be forwarded to a custom phone number added to the rule.
External PBX phone	the call should be forwarded to the desk phone that is behind a PBX connected to the system.
Play activity	the call will play current activity.
Send ringing	a ringing tone will be played.
Send busy response	a busy tone will be sent to the calling party.
Send decline response	a decline tone will be sent to the calling party.

8.4.2. Outbound Rules

Click **Add** to insert a new outbound rule. Follow the instructions on screen to build a new rule with matching criteria and actions.

Table 8.3. Outbound Rules Match Criteria

Match Criteria	Description
Call is tagged	To match against what the call is tagged with. This is mainly a technical rule.
Called party	To match the type of calling party, internal or external. This allow rules treating internal and external calls differently.
Call's destination is tagged	To match the call's destination towards a list of tags. This is mainly a technical rule.
Call's source is tagged	To match the call's source towards a list of tags. This is mainly a technical rule.
Date	The possible values are before, after or a specific date.
Day of week	It is possible to specify "is" or "is not" and then provide the day of week.
Dialed number	To match the dialed number against a set of defined number types, for example international or mobile.
Diverted	To match on calls that have been diverted by one user to another number while using the "Enter number:" setting. A call forked to a user's own devices is not considered a diversion.
Nightmode	To match the Nightmode state. Possible values are True and False. This rules allows specifying what should happen when Nightmode is active or not. For example, should calls be forwarded to a mobile when a call is received during Nightmode.
Role	To match against the current presence role. Possible match values are the roles configured for the organization.

Match Criteria	Description
Time	To match a time value. Possible values are before or after a specified time.

The outbound rules actions are either used to specify the calling party number to be displayed for the placed call or to block a placed call for different reasons. The following outbound rule actions are available:

Table 8.4. Outbound Rules Actions

Action	Description (If the rule is matched...)
Blocked because of forbidden destination	the call will be blocked and instead the caller will hear a prompt informing the reason for blocking the call.
Blocked because of restricted time	the call will be blocked and instead the caller will hear a prompt informing the reason for blocking the call.
Blocked because of unauthorized user	the call will be blocked and instead the caller will hear a prompt informing the reason for blocking the call.
Placed from anonymous line	the calling party number will be hidden for the placed call.
Placed from billing id line	the calling party number will be the billing id line.
Placed from personal office line	the calling party number will be set to the number configured as the primary personal number for the user.
Placed from external system	the calling party number will be set to the number configured on the external system.
placed from	the calling party number will be set to the function number chosen in the next dropdown list.
Placed from secondary office line	the calling party number will be set to the number configured as the secondary personal number for the user.
Placed from switchboard line	the calling party number will be set to the switchboard number of the organization.
Redirected to switchboard	the caller will be redirected to the switchboard number instead of connected to the dialled number.

8.4.3. Fallback Rules

Click **Add** to insert a new fallback rule. Follow the instructions on screen to build a new rule with matching criteria and actions.

Table 8.5. Fallback Rules Match Criteria

Match Criteria	Description
Calling party	To match the type of calling party. This can be: internal, external, favourite, blocked, VIP. This allow rules treating callers differently.

Match Criteria	Description
	VIP contacts match rules both for VIP and for favourites.
Date	To match a date. The possible values are before, after or a specific date.
Day of week	To match a weekday. It is possible to specify "is" or "is not" and then provide the day of week.
Time	To match a time value. Possible values are before or after a specified time.

The following actions are available for fallback rules.

Table 8.6. Fallback Rules Actions

Action	Description
Fallback to switchboard on no answer after 30 seconds	If the called party has not answered within 30 seconds, the call will get diverted to the switchboard number.
Fallback to switchboard on busy	If the called party is busy in a call the call, will get diverted to the switchboard number.
Fallback to switchboard on call rejected	If the called party declines an incoming call the call will get diverted to the switchboard number.
Enter phonenumber... on call rejected	If the called party declines an incoming call the call will get diverted to the entered phone number.
Send busy response on busy	If the called party is busy, the calling party will hear busy tone.
Send failure response on failure	If the call fails the error cause will be forwarded to the calling party.

8.4.4. Rule Order

Each rule defined is added to an ordered list. When a rule is processed the system start evaluating the match criteria of the first rule in the list. If the rule has no match, the system continues down the list until a match is found.

It is possible to change the rule order using the up and down arrows.

8.5. Future presence

With future presence you can schedule presence events.

To add a new future event press +. Add your info, period and if the event should be repeated.

You can map diversions to the activity from the Activity Diversion setting.

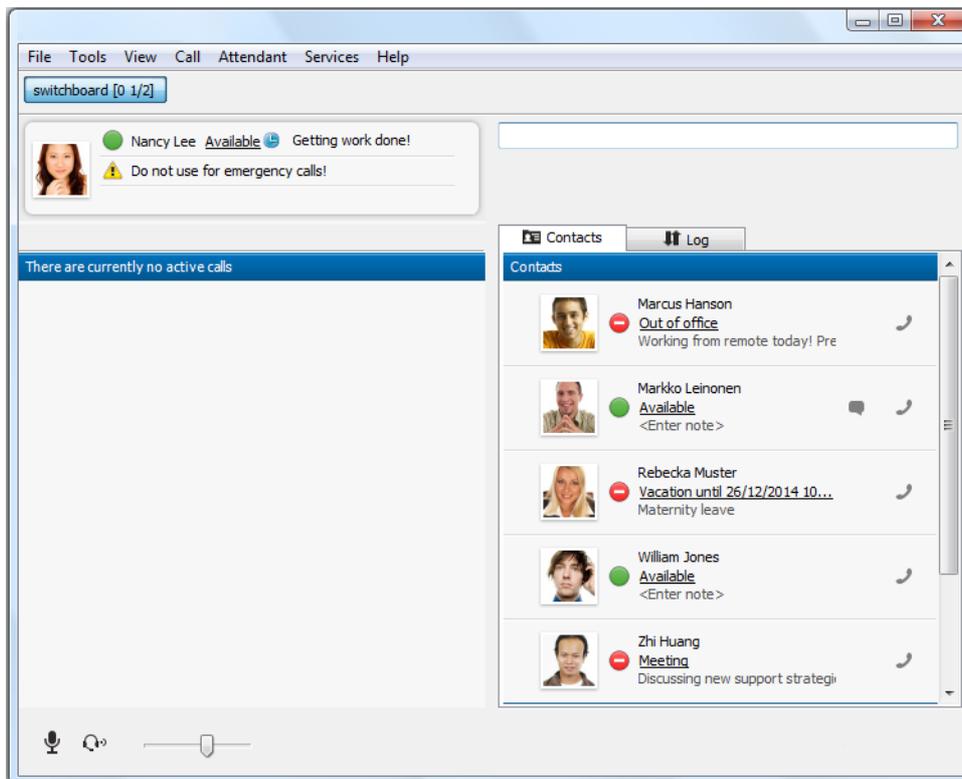
Chapter 9. Attendant Functionality

9.1. Attendant View

The Attendant view contains the calling view with incoming and ongoing calls to the left, the contact list view to the right and the attendant groups and their status on the top. The call handling function is the same in the attendant view as in the standard view. However, as an attendant you can also camp-on calls to busy extensions.

To switch to the Attendant view

- In the menubar, select **View > Attendant view**.



9.2. Extended search

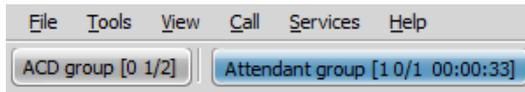
When logged into a distribution group, you also have the extended search feature activated by default as an attendant. This will enable you to quickly find whom you are looking for as you see what field that matches from your search query on your search results.

Extended search is enabled on both standard view and attendant view. You enable or disable the extended search from the advanced settings in the preferences.

9.3. Queue Handling

The top of the view presents the attendant and ACD groups you belong to, if you are logged in or out, and agent status. The number of available agents and calls in queue are displayed in the form (number of calls waiting [logged in agents/available agents]). If calls are in queue in a group, the waiting time for the first call is also shown. If you have logged in to an

attendant group you are able to pick up calls for the attendant group. It is also possible to see the number of calls in the queue and the time for the first call in the queue.



9.3.1. Queue distribution

There are a few settings that affect how the queue is being handled and how calls are being distributed. These settings are controlled by the administrator. This section lists a few of these settings.

9.3.1.1. Destination of calls

The administrator can set which types of devices the calls are distributed to. Your own personal call routing rules will not apply for distribution of calls.

9.3.1.2. Distribution of calls

The administrator can set after how many seconds the call should go to the next attendant or agent. Also if the presence state affects the distribution of the calls. That means if no attendants or agents are logged in and in the Available presence state, the call will be forwarded to a pre-set number.

9.3.1.3. Queue overflow for incoming calls

Queue overflow happens when a pre-set amount of users in the queue are exceeded, or if the maximum waiting time is exceeded. When any of this happens the incoming call either gets a busy tone or is forwarded to another pre-set number.

9.3.1.4. Handling of queued calls

Queued calls can be forwarded to a pre-set number when the caller has been waiting in queue more than a set number of minutes. If no attendant or agent is logged in and is in the available state the queued call can also be forwarded to a set number. If the configured number of distribution attempts have been exceeded, the queued call can be forwarded to the no attendant number.

9.3.1.5. Missed calls

The administrator can set so after a number of missed calls you are logged out of the distribution group.

9.4. Queue and Agent statistics tabs

An ACD supervisor who are authorized to supervise specific groups, can see the widgets Queue statistics and Agent statistics for these groups. They appear as extra tabs in the **Standard view** and the **Attendant view**. Using the widgets, the supervisor can see the statistics for the groups, and log in and log out agents to these groups.

9.4.1. Queue statistics

The queue statistics widget shows all the ACD and attendant groups you are authorized to supervise, and let you log in and log out agents to these groups. The statistics is presented in the administrator configured running time span.

- **Group** - The name of the group. Click on the group to expand it. When expanded, the group provides: Agent members of the group, with logged out agents having names in grey; Agent status; skill, where skill 1 is the highest and 5 the lowest skill; and a button to log in or log out the agent to or from the group.
- **# in queue** - Number of persons in the queue.
- **Last wait** - The time in minutes:seconds the last picked up call waited before the call was picked up.
- **Avg wait** - The time in minutes:seconds the average call in the configured time span waited before the call was picked up.
- **Dropped** - The number of calls that were hang up by the callers before they were picked up.

9.4.2. Agent statistics

The agent statistic widget shows all the info provided by the Queue statistic widget, but it is sorted by Agent name instead of group name. See Queue statistics for more information.

9.5. Group login

You can see your login status on the group buttons on top of the application window, and login or logout by pressing the buttons.

The login/logout buttons are highlighted for the groups you are logged into.

-  - You are logged in to the group. Click to logout.
-  - You are logged out from the group. Click to login.

9.6. Transfer Calls

There are certain keyboard shortcuts that are only available when viewing the application in Attendant view. They are meant to speed up the call handling. All keyboard shortcuts are customizable in the **Settings > General > Keyboard...** section. There are 2 different options to transfer calls.

9.6.1. Blind transfer

When answering a call the focus will automatically be set to the search field. To start a blind transfer search for a contact or enter a number that the call should be transferred to.

- If the search result is only one contact or number then press the **Blind Transfer** key to transfer the call.
- If the search result returns multiple contacts then navigate the contact list using the **Navigate Contacts Up/Down** keys and make sure the contact you want to transfer to has the selection marker. Press the **Blind Transfer** key to transfer the call.



Note

If you have multiple ongoing calls when doing a blind transfer it will pick the active call to transfer. If there are no active calls you have to select the call by Using the **Navigate Calls Up/Down** keys.

9.6.2. Attended transfer

When answering a call the focus will automatically be set to the search field. To start an attended transfer, place a call to a contact or a number that the first call should be transferred to.

- If there are only two ongoing calls then press the **Attended Transfer** key to transfer the calls.
- If there are multiple ongoing calls then navigate the Calls list using the **Navigate Calls Up/Down** keys and make sure the call you want to transfer to has the selection marker. Press the **Attended Transfer** key to transfer the call.

9.7. Camp-On

Camp-on is an attendant functionality which allows you to transfer a call to a busy user. If the user is busy with a call, a personal queue is created, which the transferred call is put on hold in. When the user's first call is ended, the transferred call in the personal queue is connected.



Note

Camp-on is only possible to do for calls that has been made to a attendant group number.

Camping-on a call is made the same way as a normal transfer. The only difference is that a camp-on icon  is displayed on busy extensions instead of the normal transfer call icon.

It is possible for an administrator to set a maximum waiting time, for the transferred calls that has not been picked up, before the attendant is notified that the call has not been picked up. It is also possible to notify all attendants in the attendant group after a set maximum waiting time.

If the call remains on hold too long in the queue, and an attendant picks up the call, it is possible to re-camp the call into the queue again. The call is then put back in the queue in the kept queuing position.

To re-camp a call

-  . You can also press the Return key on your keyboard.



Note

If you camp-on the call normally and not via the re-camp button, the call will not keep its queuing position and will be placed last in the queue.

9.8. Transferred calls

During a transfer, new incoming calls will be placed in the queue. They will not be automatically routed to you until the transfer is complete. You can pick up a new call in the queue by clicking on the pick up button.

If a transfer has failed, you will get notified and can pick up the call again. This could be, for example, if the contact you transferred the call declined to answer. The call will then

be placed on hold, and the call will flash in the call view to let you know this call requires immediate attention.

9.9. SMS messages

You can send SMS messages with the attendant number as from number, if this is configured on the server. See [Section 5.3, "Messaging"](#) for more information.

9.10. Send email and SMS to a contact using call message templates

This is an attendant functionality which allows you to send an email or SMS to a contact with pre-filled information about the current call. The pre-defined template text that is used for this can be changed in the Options dialog.

The email will be created with your default email client application, and will have the email template text pre-filled in its subject and content. The SMS will be sent using the functionality in the application, and will be pre-filled with the SMS template text.



Note

You need to be logged in to an attendant group to be able to use this functionality.

9.10.1. Send email or SMS when received a diverted call

When you receive a call from a contact that tried to reach another contact that diverted the call to you, you can click the  button to create a new email, or the  button to create a new SMS in the call panel.

9.10.2. Send email or SMS during an ongoing call

During an ongoing call, you can send an email or SMS using the button  to create a new email, or the  to create a SMS for a contact in your contact list. You can also use the search functionality to send to a contact that is not currently in your contact list.

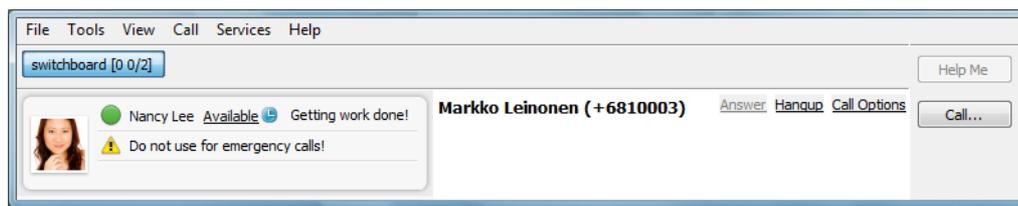
Chapter 10. ACD Functionality

10.1. ACD Agent View

The ACD Agent View contains the menu and the call information field with the possibility to dock the field to the top or the bottom of the screen. The call handling function is the same in the ACD Agent view as in the standard view.

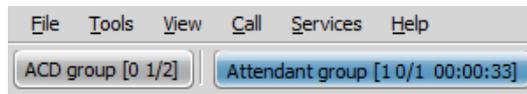
To switch to the ACD Agent view

- In the menu bar, select **View > ACD Agent view**.



10.2. Queue Handling

The top of the view presents the attendant and ACD groups you belong to, if you are logged in or out, and agent status. The number of available agents and calls in queue are displayed in the form (number of calls waiting [logged in agents/available agents]). If calls are in queue in a group, the waiting time for the first call is also shown. If you have logged in to an attendant group you are able to pick up calls for the attendant group. It is also possible to see the number of calls in the queue and the time for the first call in the queue.



10.2.1. Queue distribution

There are a few settings that affect how the queue is being handled and how calls are being distributed. These settings are controlled by the administrator. This section lists a few of these settings.

10.2.1.1. Destination of calls

The administrator can set which types of devices the calls are distributed to. Your own personal call routing rules will not apply for distribution of calls.

10.2.1.2. Distribution of calls

The administrator can set after how many seconds the call should go to the next attendant or agent. Also if the presence state affects the distribution of the calls. That means if no attendants or agents are logged in and in the Available presence state, the call will be forwarded to a pre-set number.

10.2.1.3. Queue overflow for incoming calls

Queue overflow happens when a pre-set amount of users in the queue are exceeded, or if the maximum waiting time is exceeded. When any of this happens the incoming call either gets a busy tone or is forwarded to another pre-set number.

10.2.1.4. Handling of queued calls

Queued calls can be forwarded to a pre-set number when the caller has been waiting in queue more than a set number of minutes. If no attendant or agent is logged in and is in the available state the queued call can also be forwarded to a set number. If the configured number of distribution attempts have been exceeded, the queued call can be forwarded to the no attendant number.

10.2.1.5. Missed calls

The administrator can set so after a number of missed calls you are logged out of the distribution group.

10.3. Queue and Agent statistics tabs

An ACD supervisor who are authorized to supervise specific groups, can see the widgets Queue statistics and Agent statistics for these groups. They appear as extra tabs in the **Standard view** and the **Attendant view**. Using the widgets, the supervisor can see the statistics for the groups, and log in and log out agents to these groups.

10.3.1. Queue statistics

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- **# in queue** - Number of persons in the queue.
- **Last wait** - The time in minutes:seconds the last picked up call waited before the call was picked up.
- **Avg wait** - The time in minutes:seconds the average call in the configured time span waited before the call was picked up.
- **Dropped** - The number of calls that were hang up by the callers before they were picked up.

10.3.2. Agent statistics

The agent statistic widget shows all the info provided by the Queue statistic widget, but it is sorted by Agent name instead of group name. See Queue statistics for more information.

10.4. Group login

You can see your login status on the group buttons on top of the application window, and login or logout by pressing the buttons.

The login/logout buttons are highlighted for the groups you are logged into.

- **Support [0 0/2]** - You are logged in to the group. Click to logout.
- **Switchboard [0 1/1]** - You are logged out from the group. Click to login.

10.5. Manager Assistance

When logged on as an ACD Agent it is possible to request assistance from a manager by calling a predefined number.

Click **Help Me** in the ACD Agent view to call for manager assistance.

10.6. SMS messages

You can send SMS messages with the ACD number as from number, if this is configured on the server. See [Section 5.3, "Messaging"](#) for more information.

Chapter 11. Troubleshooting

11.1. My administrator has added me to an ACD or Attendant group but I cannot see the login button.

You need to restart your application for the updates to load.

Chapter 12. About

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