



Vonex Softphone

Desktop Application
User's Manual

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How to start working with your desktop App

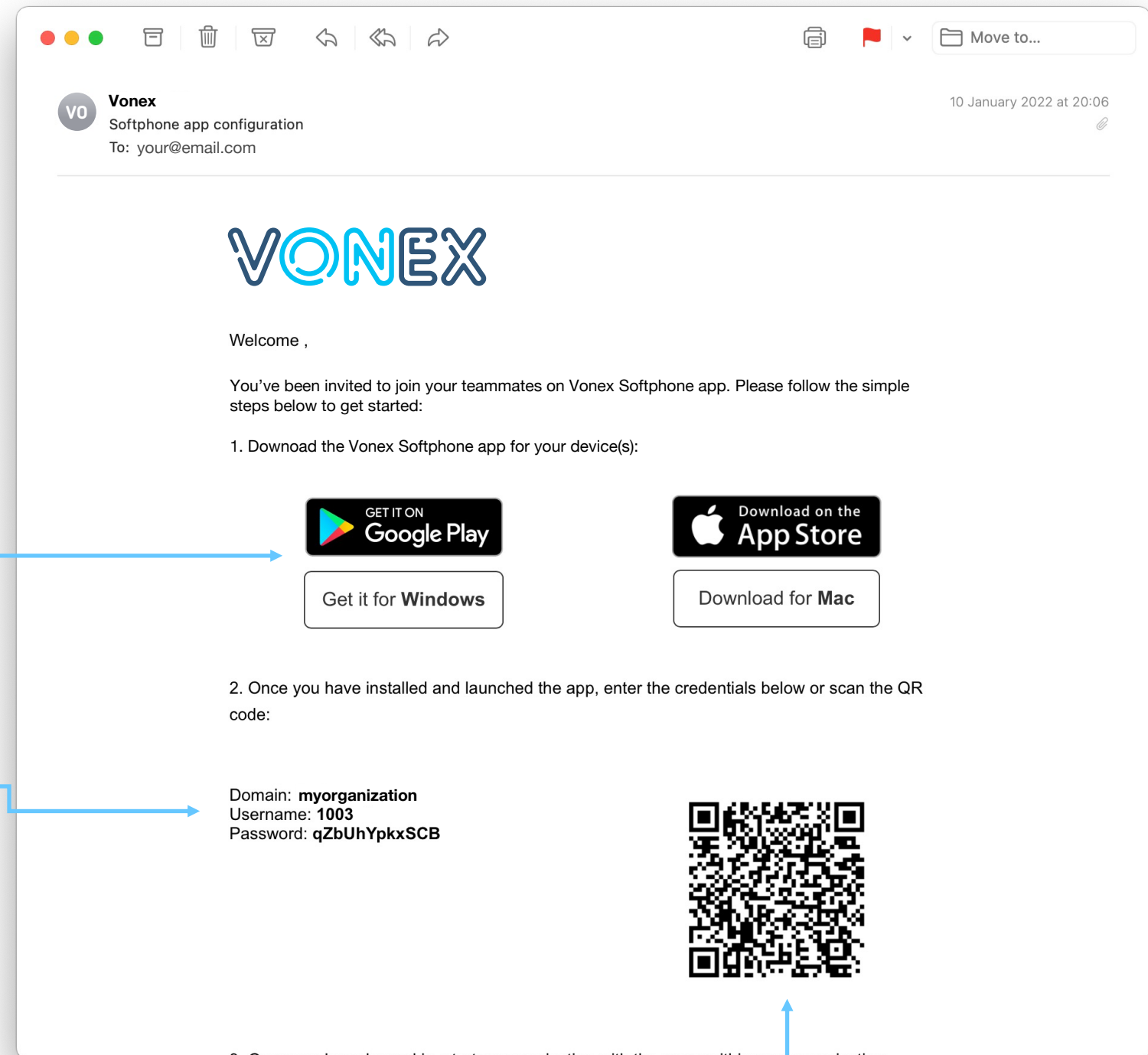
To start using the application on your desktop device, you need to:

1. Open an email from your PBX Administrator that contains links for downloading the apps, your authentication credentials and a QR-code for easy access to your account.

Links to the apps for different devices.

Credentials that you need to use to log into the app.

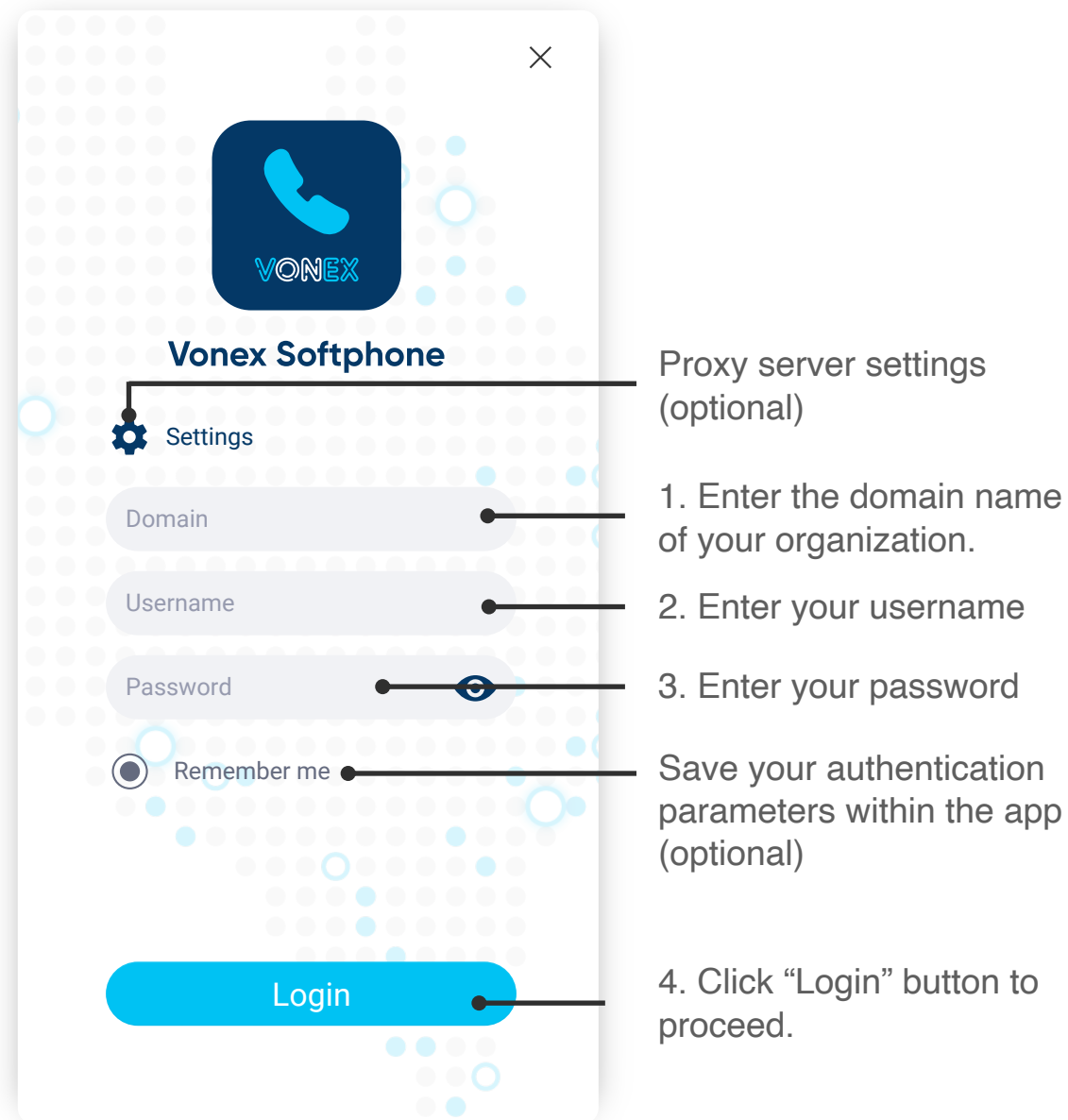
2. Click on icon to download the mobile app, suitable for the Operating System on your desktop device.
3. After installing the app on your phone, click on the app icon  to launch the app.
4. To log into the app, you can enter your Authentication Credentials provided in the email you received from your PBX Administrator.



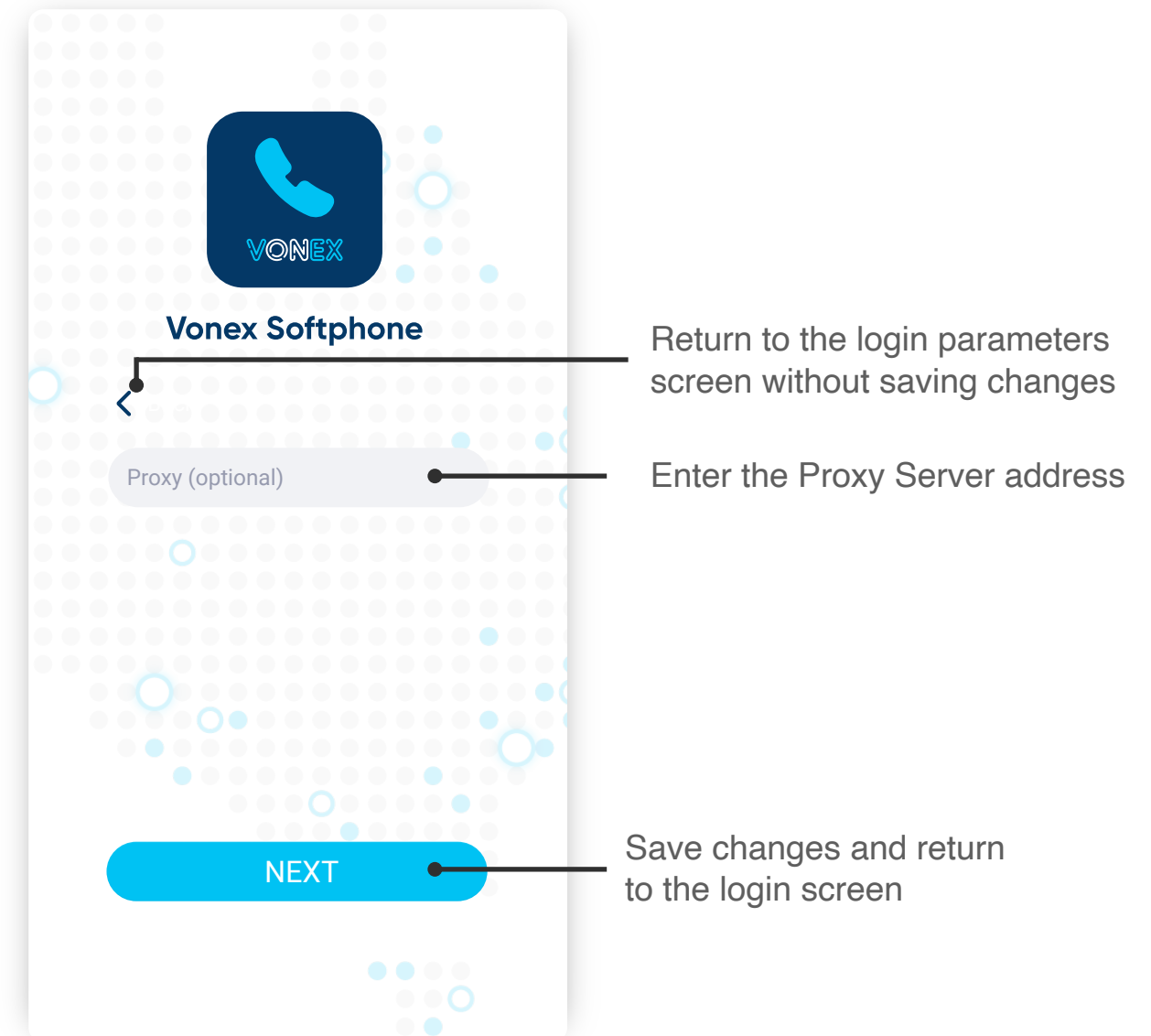
QR-code for quick access to the app from a mobile device.

Login screen

To start using the app on your Mac or Windows PC click on the app icon in the launchpad (Mac) or in the Start menu (Windows). Then enter the authentication parameters provided in the email you received from your PBX Admin as shown below.



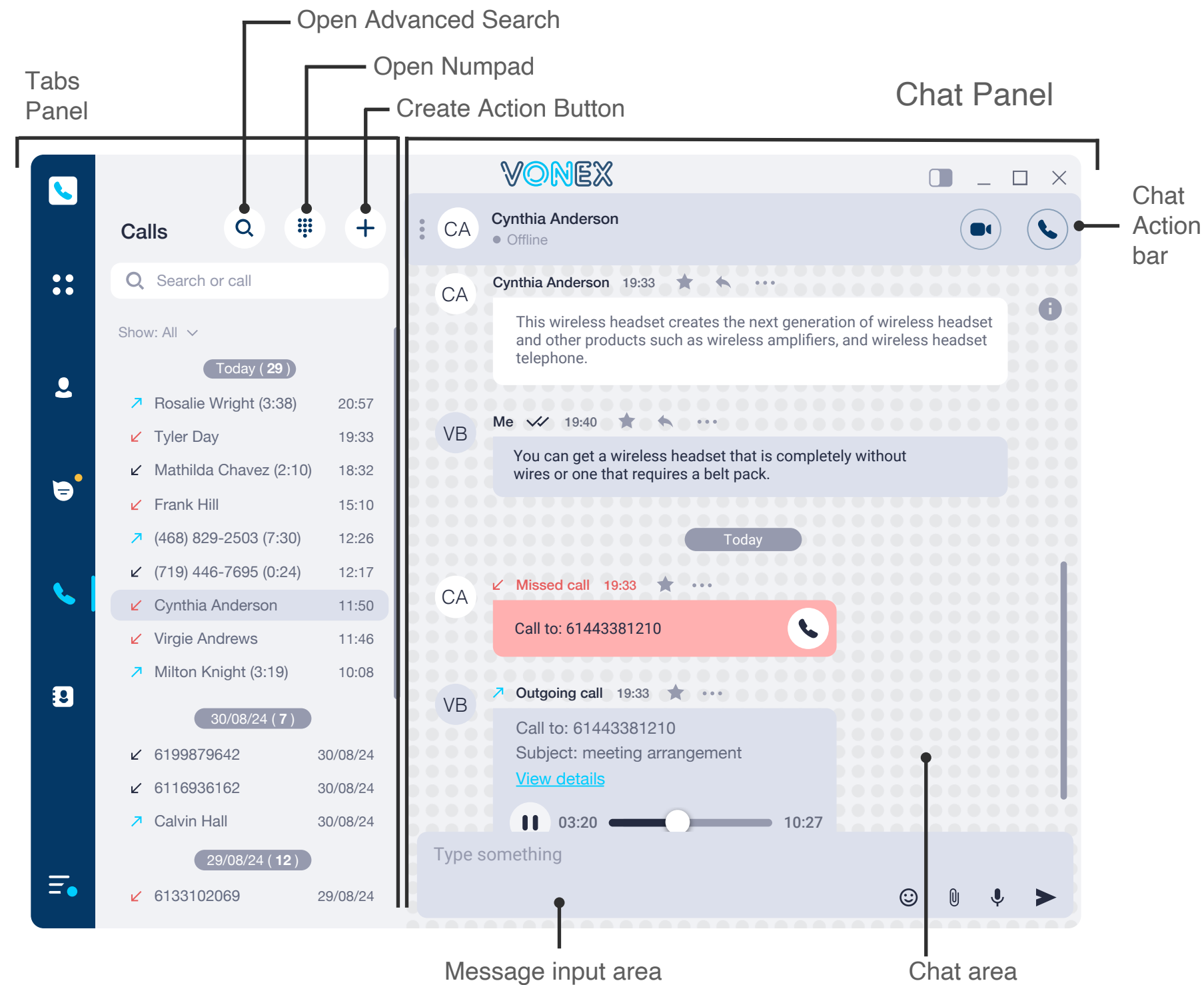
After you have entered your domain name and clicked the **NEXT** button, a username and password entry fields will appear on the screen.



In case of any errors occurring during authentication process - please check if the information you entered is correct and you have a stable internet connection.

User interface

After you've logged into the app, you'll see a user interface as shown on a screenshot below:








The navigation panel on the left side of the desktop app has following tabs:

- Speed dial.** In this tab, you or your PBX administrator can add phone numbers, emergency contacts, and buttons for quick access to various PBX features.
- Users.** This is where you can find your colleagues contacts and all internal office phone numbers.
- Chats.** Here you can chat with your team, share files, photos, etc., and send SMS to your external contacts (only if SMS feature is enabled for your account in the admin portal).
- Calls** tab is where you can dial a phone number to make a call and view the history of all the calls you've made.
- Contacts.** This is where all your external contacts, like clients, partners etc., are listed.
- Menu.** Here you can find all the app settings, including your profile and presence status selection.

User presence states

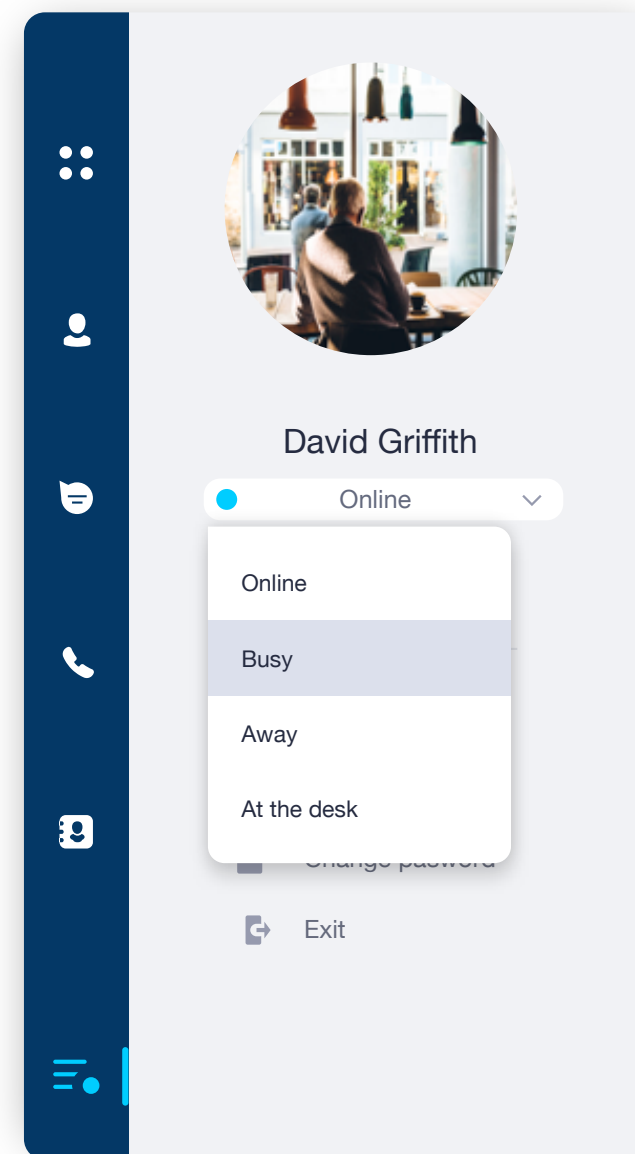
With the help of various user statuses your mobile app allows you to share your availability with the team and check the availability of your colleagues. There are 5 different states a user can have:

-  **Online.** This state shows that user is currently online and able to receive calls and messages.
-  **Away.** This state indicates that user is currently out of his work place. Does not affect the ability to receive calls and messages.
-  **Busy.** In this state all incoming calls will be blocked but user will still be able to receive messages.
-  **Offline.** Offline Users cannot receive neither calls nor messages.
-  **At the desk.** You can set this status manually if you have a desk phone connected to your Phone System and you would like for all incoming calls to be routed first to this desk phone. Meanwhile your mobile apps will receive incoming calls with a set delay.

Changing own state

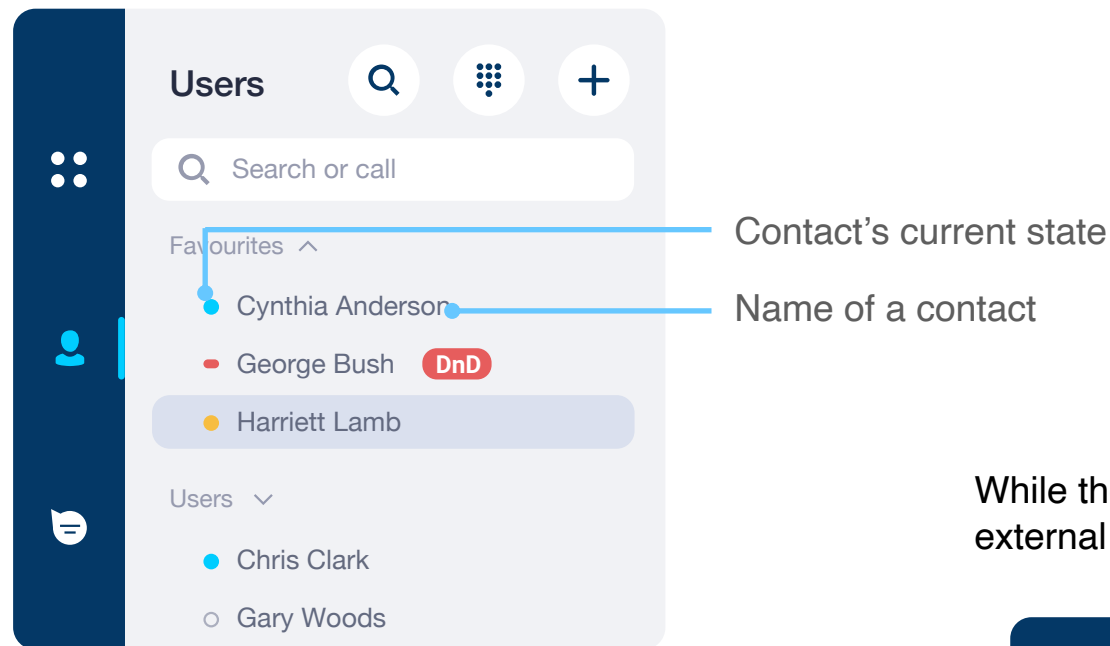
To change your own state:

1. Select Menu Tab and click on current state description below your name.
2. In the drop-down menu choose the state you want to take.

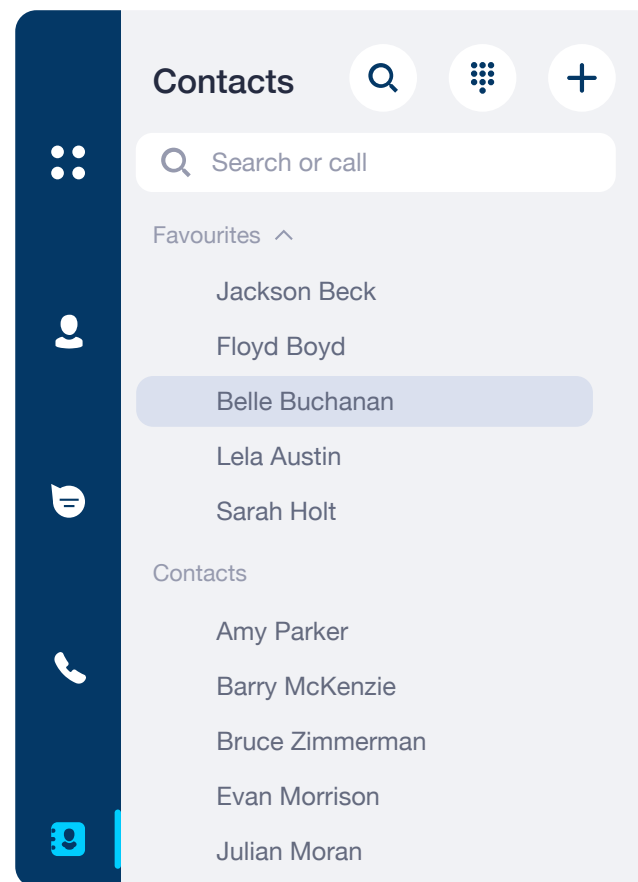


Contacts and Users tabs

In the Users tab you can see contacts of all your colleagues together with their presence statuses.

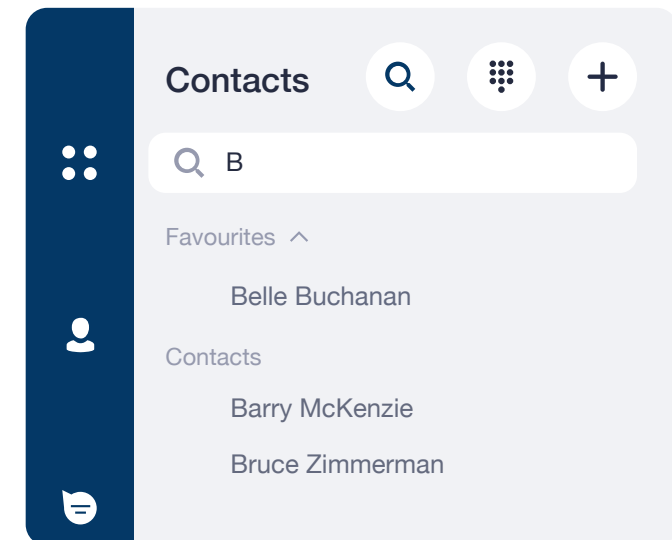


While the Contacts tab contains all your external contacts - customers, suppliers etc.



How to find a contact


To find a particular contact from your list, simply enter this contact's name in the **Search bar**

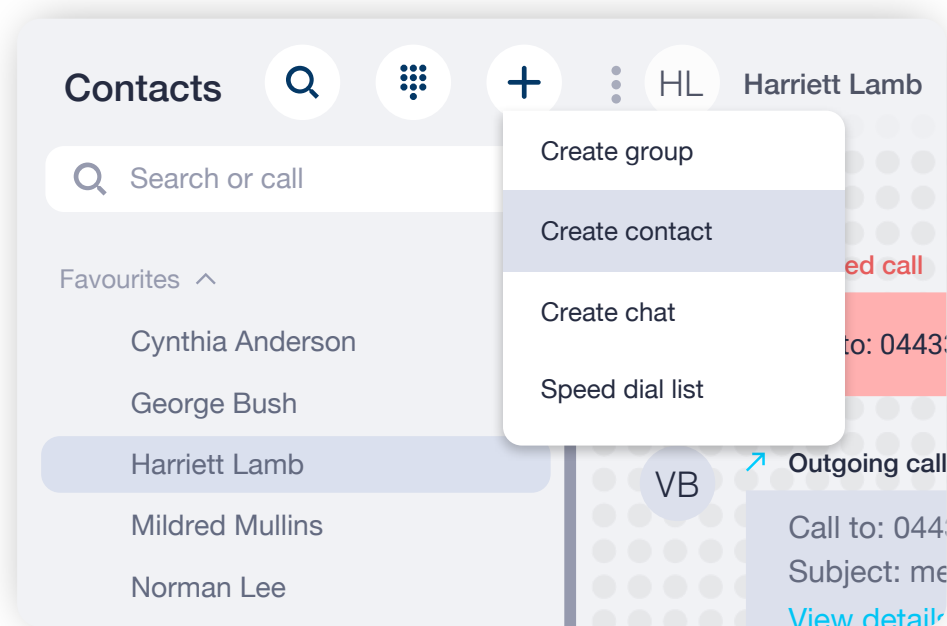


How to add and delete a contact


You can add personal external contacts to your contacts list. The details of such contacts will be available to you only.

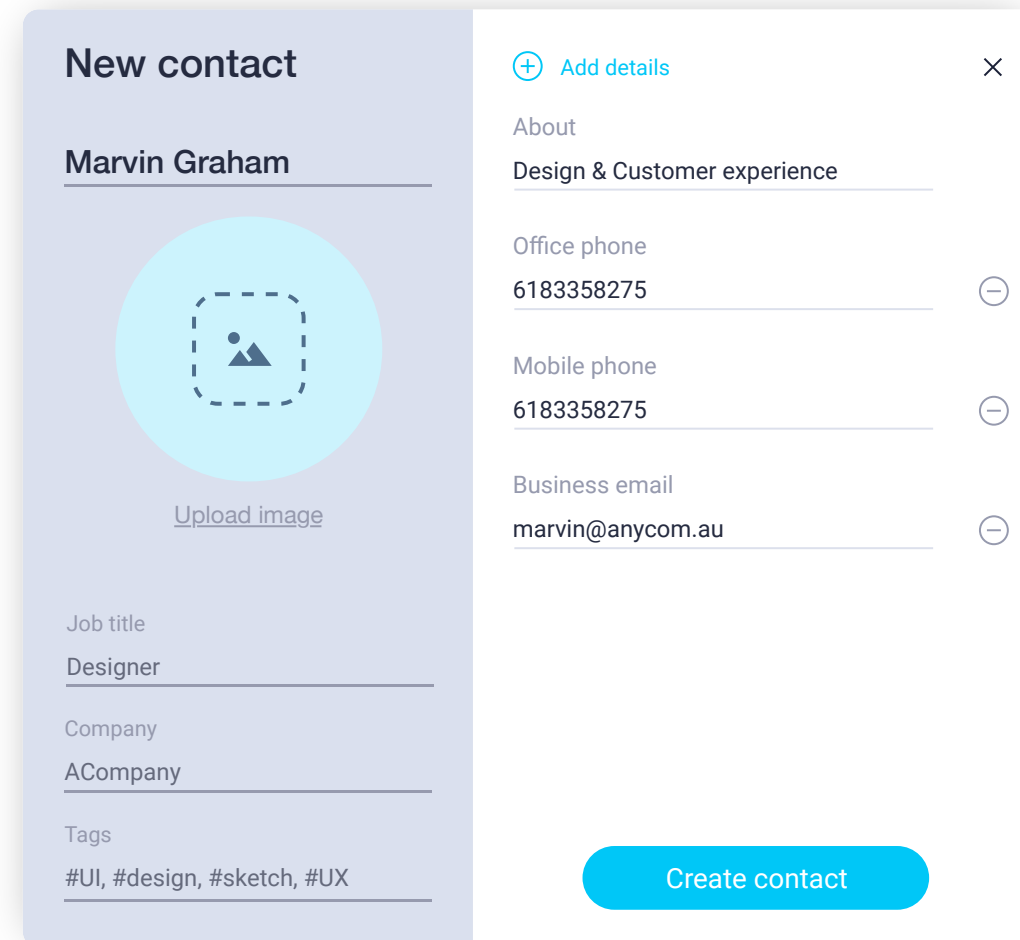
To add a personal contact:

1. Click  icon on the right of tab name.
2. In the drop-down menu choose “Create contact”.



3. In the **New Contact's window**, enter the contact's name and any other details.


You can add any type of information about your contact by clicking the  icon.

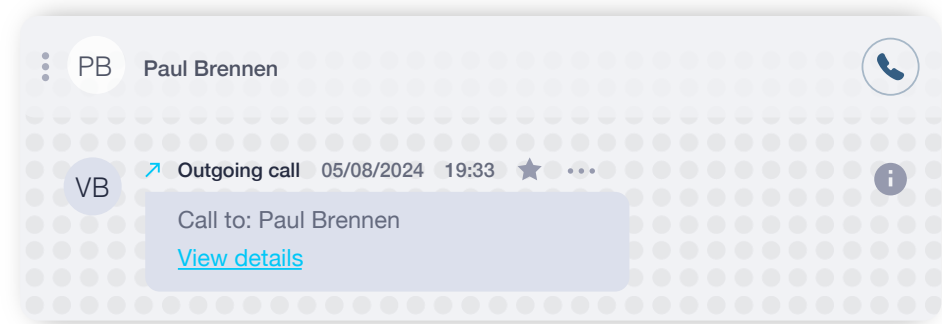


To delete a personal contact:


1. Click the right mouse button on the external contact you would like to delete while in “Contacts” Tab.
2. In the drop-down menu choose the “Delete” option.

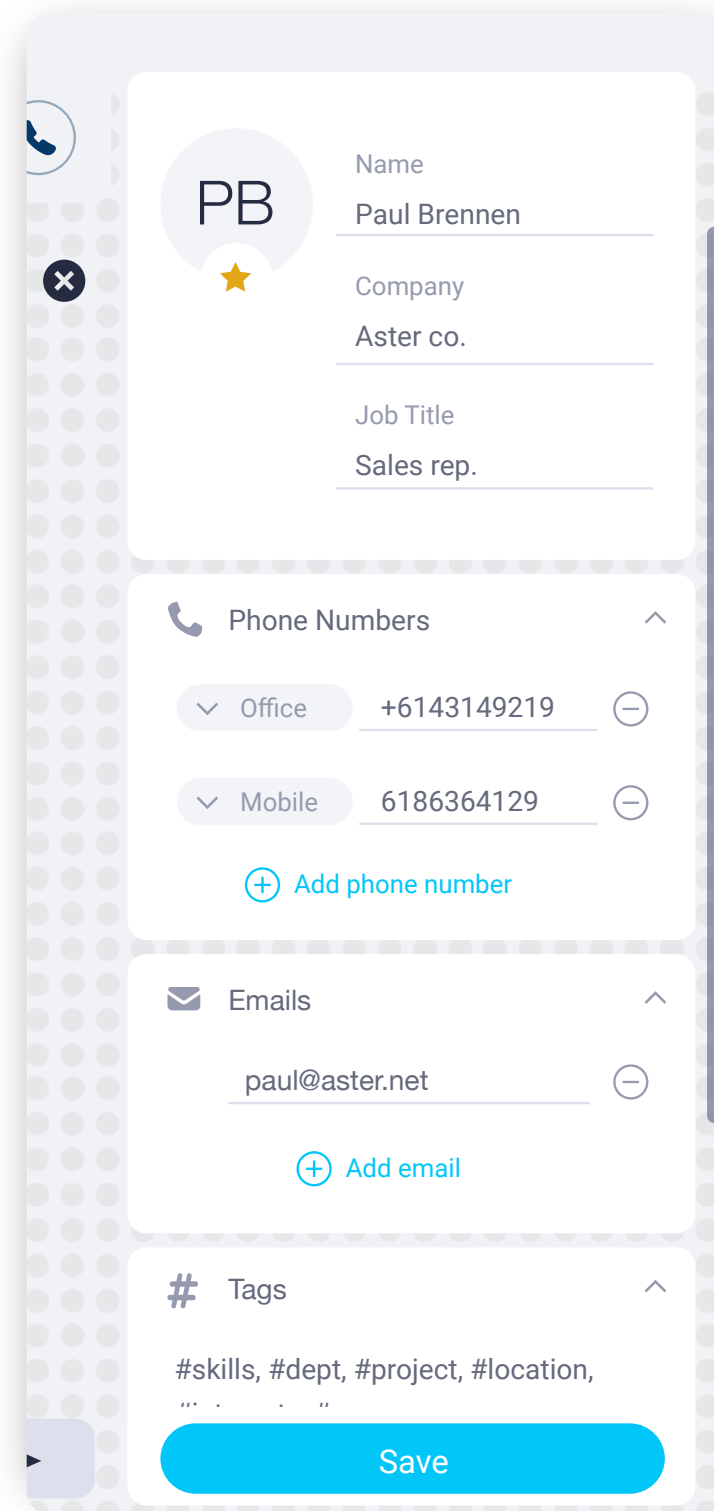
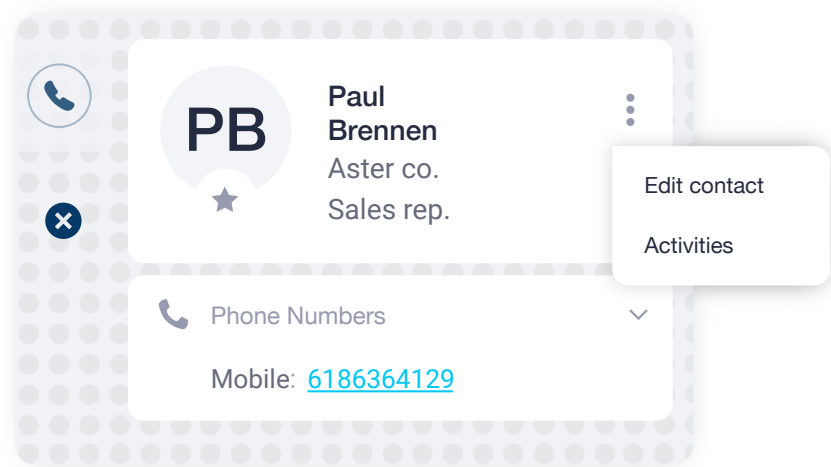
Viewing and editing contact details

To view or edit contact details, click on the icon  in the upper right corner of the chat panel.




A contact's profile can contain all information about a contact - name, company, job title, phone, email etc.

In order to edit information about the contact, click on the  icon and select "Edit contact" button in drop-down menu.



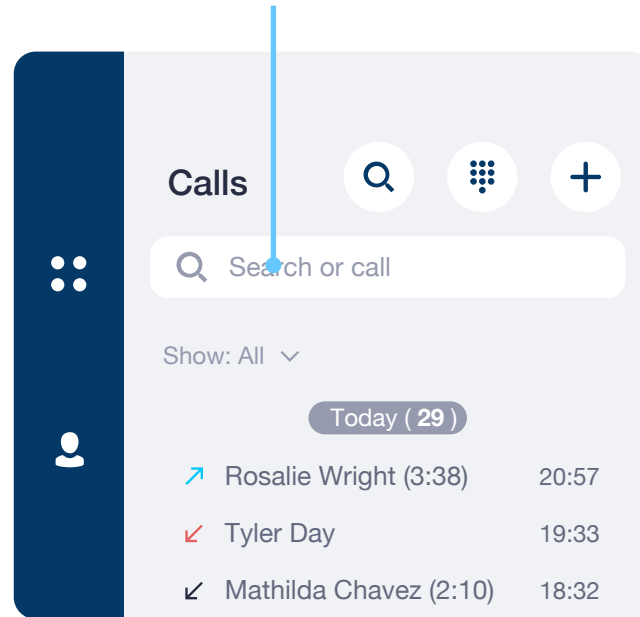
After you've finished editing a contact's details, click **Save button** to save changes.

Or click on a  icon to close contact details and discard the changes you made.

Calls

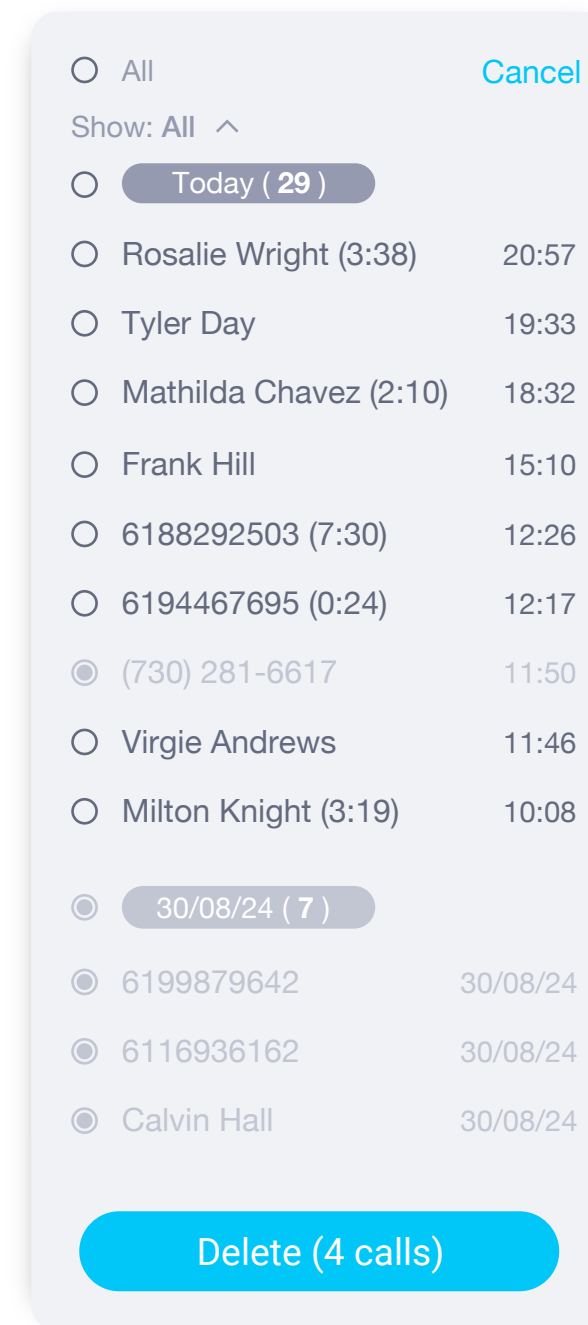
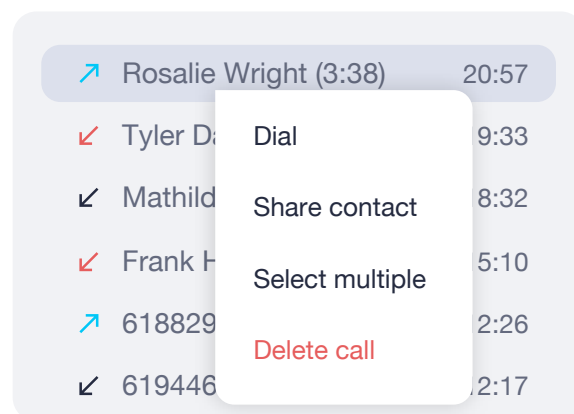
You can view history of all your incoming and outgoing calls through the [Calls tab](#).

Click on the arrow icon to switch between displaying all calls and only missed once.



Delete call history

To remove a call from history right-click on call entry and select **Delete call** from drop-down menu.



To remove multiple calls from your call history at once:

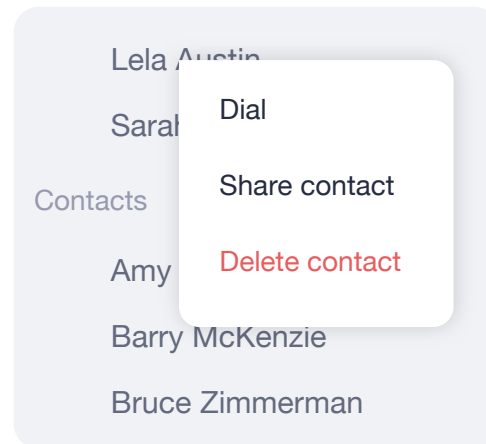
1. Right-click on any call record.
2. Select **Select multiple** from drop-down menu.
3. Select the records you would like to delete. You can click on specific date to select all entries from that date.
4. Click on **Delete** to remove entries.

Outgoing call



There are several ways you can make an outgoing call from the desktop app:

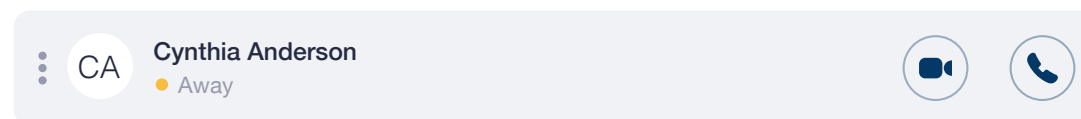
OPTION 1

1. **Right click** on a contact, chat or call record in any of the tabs.
2. Select Dial from drop-down menu to make an audio call.




OPTION 2


1. **Left click** on a contact, chat or call record to open a chat.
2. Click on  icon to initiate audio call or click on  icon to initiate video call (available only for Users).

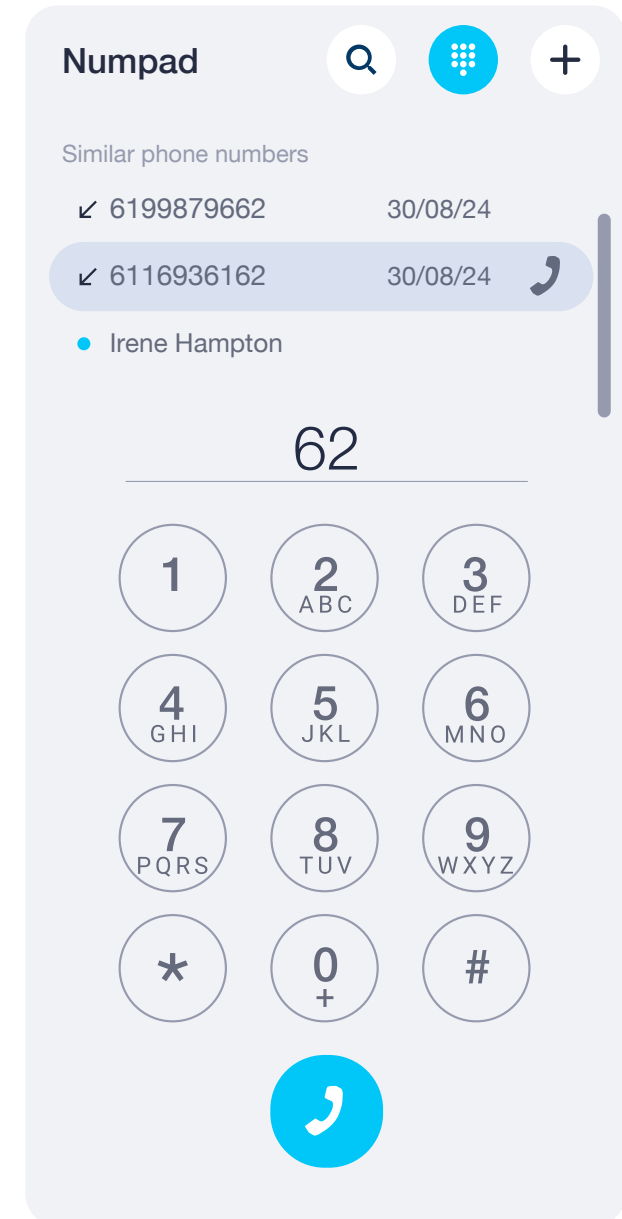
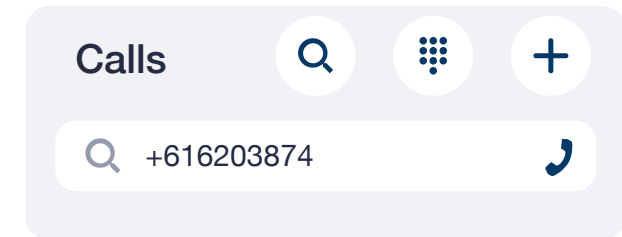


OPTION 3

1. Enter a contact's name or a phone number in the **Search bar**.
2. Press Enter or  icon make an audio call.

OR

Open dial pad by clicking on the  icon above the Search field to call extensions or external numbers.





Incoming call

When you receive an incoming call:

1. An **Active Lines** panel will appear under the **Search Bar**.







2. Click on the  icon, to answer a call, or the  icon, to drop it.

If you have an open chat with a caller during incoming call, a **Call panel** will appear at the top of Chat panel.

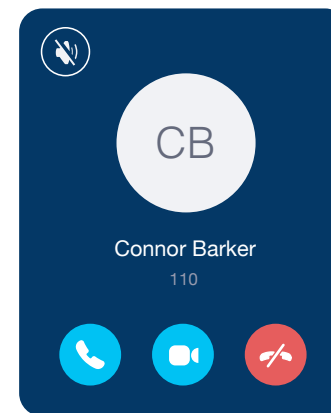


On incoming call, a **Call panel** has following buttons:

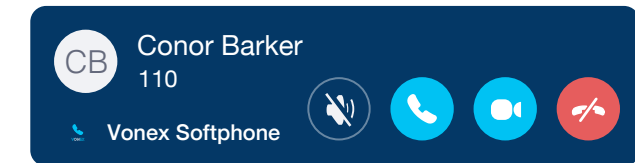
-  - to mute a ringtone,
-  - to answer a call with audio,
-  - to answer with video,
-  - to cancel it.

If you have other applications on top of you screen when receiving an incoming call, you can handle an incoming call with the help of a notification window that will automatically pop-up.

Depending on the option selected in **General Settings**, a pop-up window will have one of the following look:



OR



During a call

During a call, you can transfer call, put a call on hold, create a conference and much more. You can access those features by utilizing the UI components described below:

Active lines panel

This is where all your active calls will be displayed.

Call panel

You can access a call panel by clicking on a contact you're currently talking to in the list of contacts, chats or calls, or by double clicking on an **Active Line**.

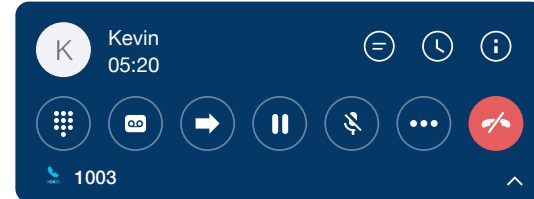
Pop-up window

This panel will automatically pop-up if a contact you're talking to is not selected in the tabs panel.


Put a call on hold

To put a call on hold:

Click the  icon on the **Call panel** or in the **Pop-up window**.



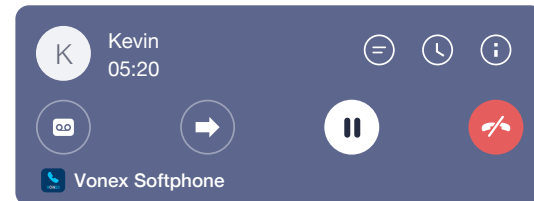
OR

Click on the  icon in the **Active lines** panel and choose **Hold** from the dropdown menu.




To resume a call from hold:

Click the same icon again to resume.



How to send DTMF-signals

Click on  icon on the [Call panel or at Pop-up window](#) to open dial-pad. You can use it to send DTMF-signal during a call.


Please, note that dial-pad from Search Bar area doesn't transmit DTMF-signals.

Turn personal call recording on/off *

To turn the call recording on/off during a call:

Click the  icon on a [Call panel or Pop-up window](#).


OR

Click on the  icon of an [Active Line](#) and select **Recording** from the drop-down menu.


** Please check the availability of this feature with your PBX Administrator.*

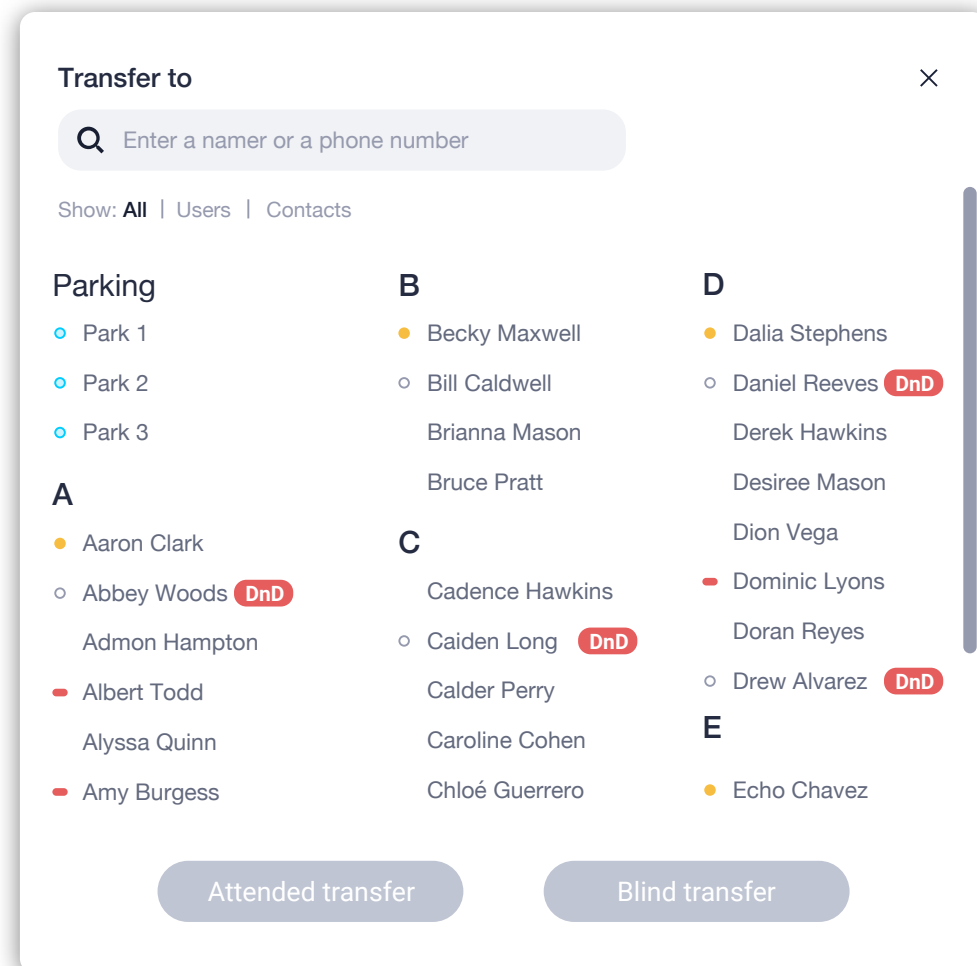
Call transfer: Blind transfer

To transfer a call:

1. Click the  icon on a [Call panel or Pop-up window](#).

OR

1. Click on the  icon of an [Active Line](#) and select **Transfer** from the drop-down menu.
2. Choose a contact you want to transfer a call to from the list or enter a new phone number in a **Search field** and click on the **Blind transfer** icon.



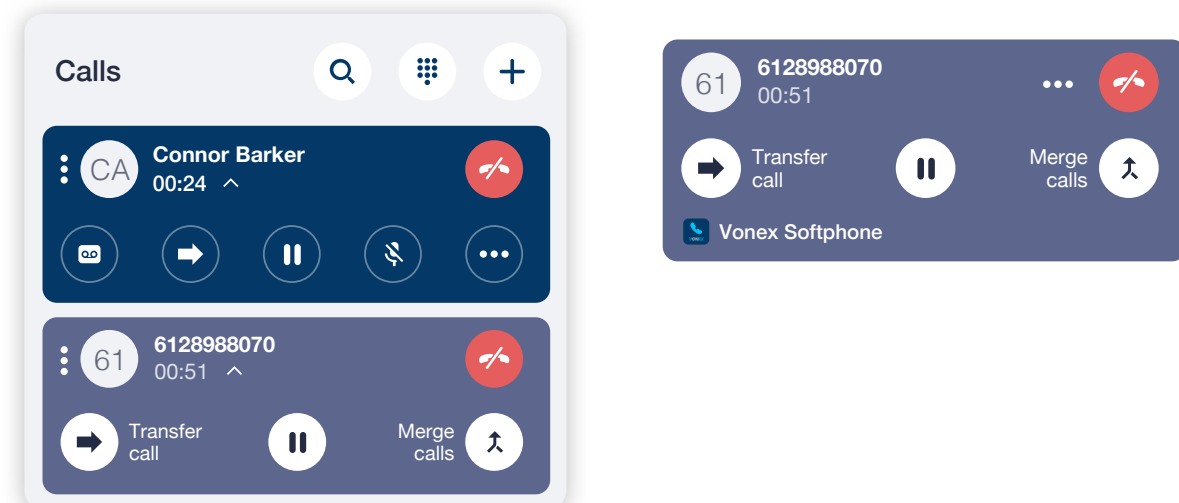
Call transfer: Attended transfer

To make a warm transfer:

1. Follow the steps 1 and 2 like for **Blind Transfer** but press **Attended transfer** button instead.

An additional active panel will appear for the second active call while the first active call will be put on hold automatically.

2. Click on the **Transfer** button at **Active Line** or **Pop-up window**.




Alternatively

You can also transfer a call in a following way:


1. During an active call, initiate a new [outgoing call](#). Current call will be placed on hold automatically.
2. Click on the **Transfer** button at [Active Line or Pop-up window](#).

Call parking *

To park a call:

1. Click the  icon on a [Call panel or Pop-up window](#).

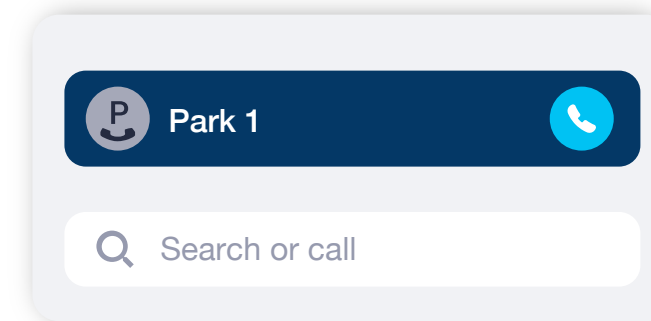
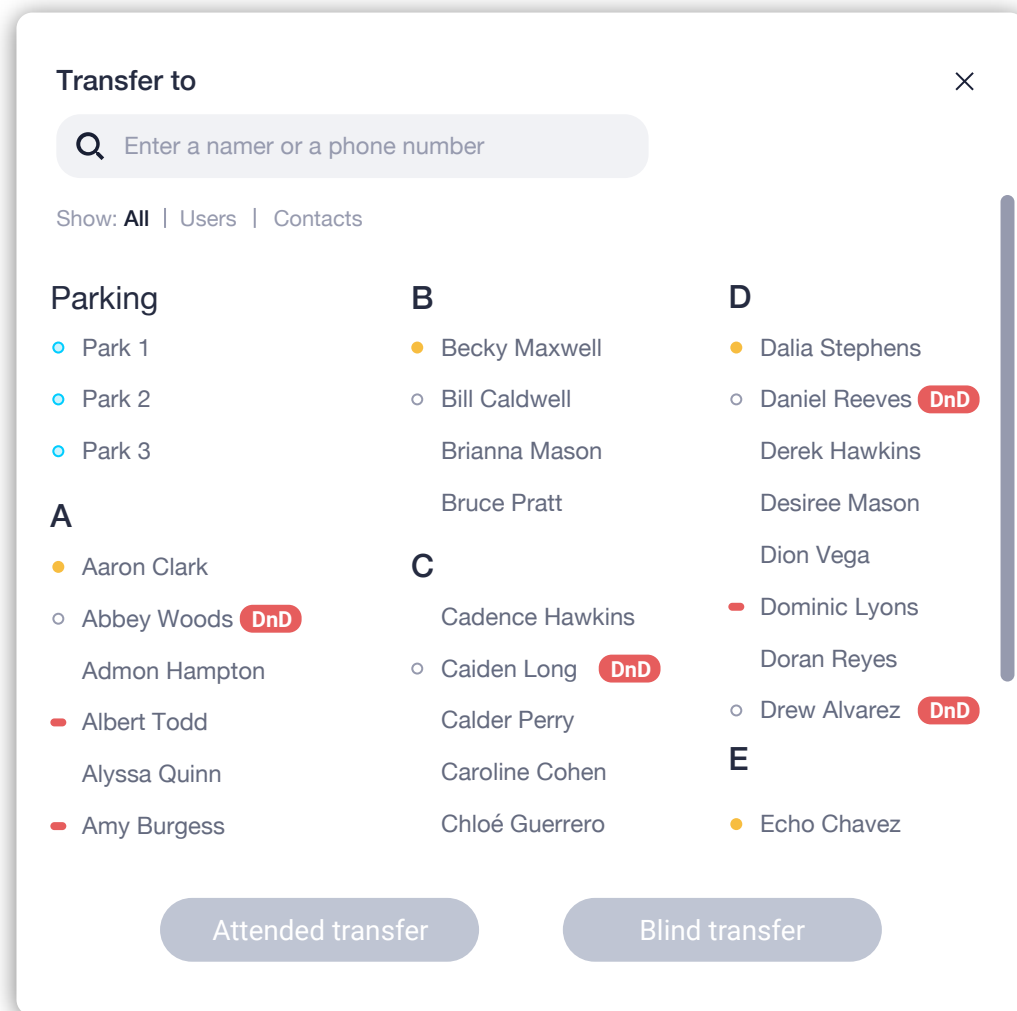
OR

1. Click on the  icon of an [Active Line](#) and select **Transfer** from the drop-down menu.

2. Choose a slot from “Parking” list.

Current call will be parked, and your **Active Line** will be released.

A parked call will be displayed in the **Tabs panel** under the **Search Bar**. It will be visible to all your colleagues, and they will be able to pick-up this call from a parking slot.



* Please check the availability of this feature with your PBX Administrator.

Conference calls

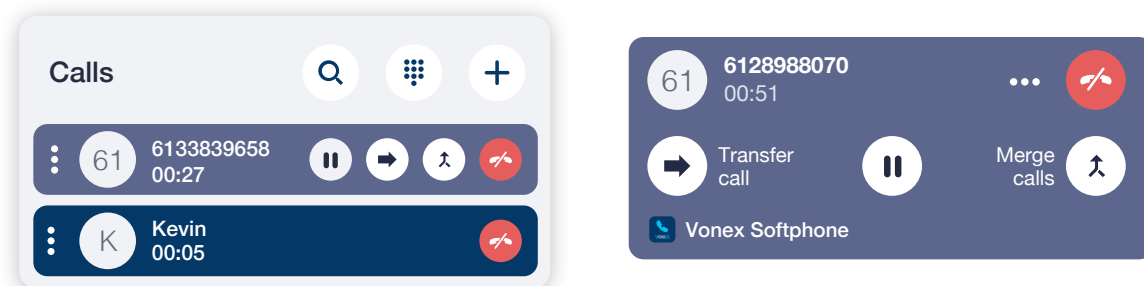
There are two ways to initiate a conference call from your desktop app:

Adding participants to a call

To make a conference during a call:

1. While you are on a call with the first participant, make and [outgoing call](#) to a person you want to add to the conference. Thus, putting the first participant on hold.

After you've successfully connected with the second participant:




2. Click on the **Merge** button at [Active Line or Pop-up window](#).

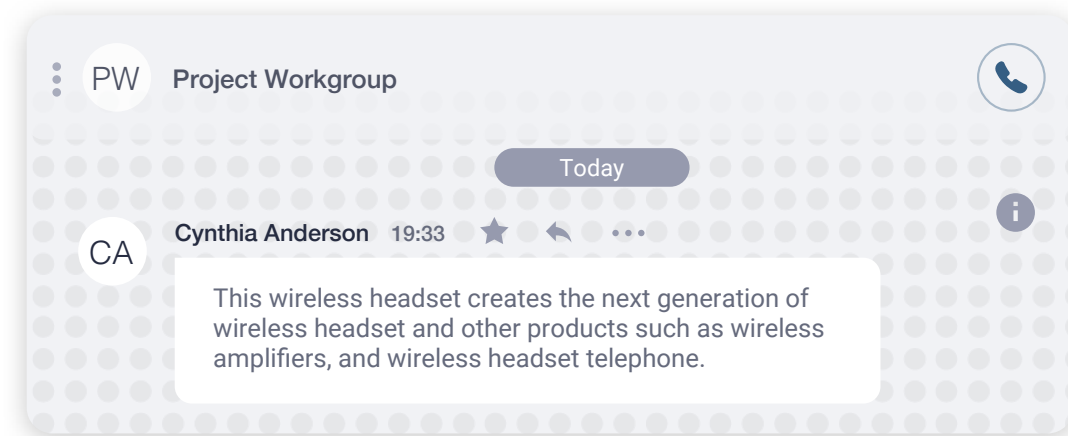
Your two active lines will merge into one.

You can repeat those steps to add more participants to a conference.

Audio & video calls in group chats

In order to organize a conference with predefined lists of participants, you need to:


1. [Create a group](#) and add participants from the list of users.
2. Open a group chat you've created and click on the  icon at the top right corner.



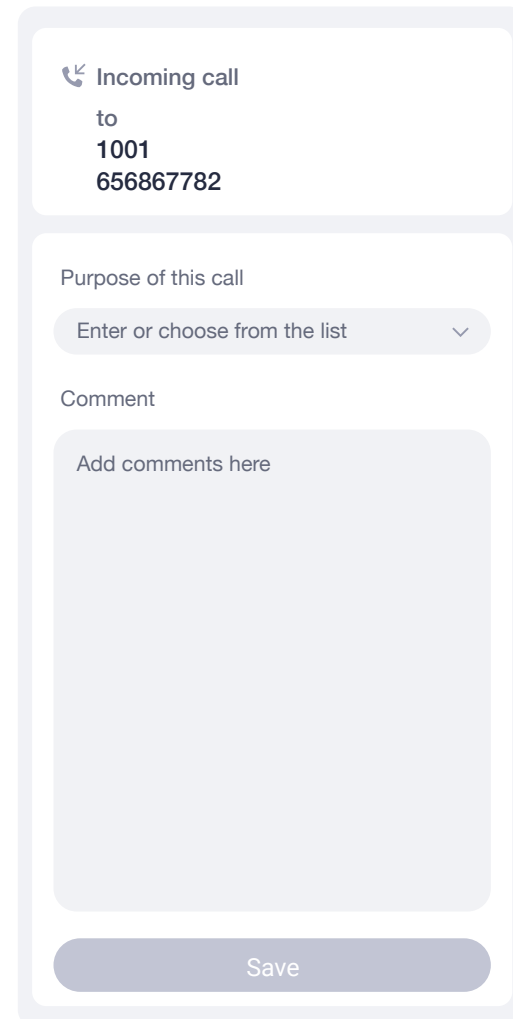
How to add notes to a call

Your desktop app allows you to add additional notes to each call. You can add a call purpose and add comments with the details of your conversations.

This feature helps you to note down essential parts of information during long conversations and have a better track of your communication history with customers.

To add notes **during a call**, click on  icon to open Call Info panel. You can add a new subject manually or choose an existing subject from a drop-down list.

Use Comment text area to add comments to a call.

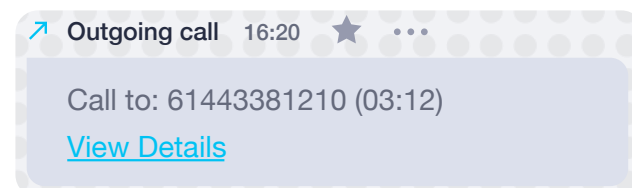


The screenshot shows the 'Call Info' panel for an incoming call. At the top, it says 'Incoming call' with a phone icon, followed by 'to 1001 656867782'. Below this is a section titled 'Purpose of this call' with a dropdown menu containing the text 'Enter or choose from the list'. Underneath is a 'Comment' section with a large text area labeled 'Add comments here'. At the bottom of the panel is a 'Save' button.

To view / edit information **after a call**:


1. Open your conversation history with a contact. You can do that by switching to the **'Calls'** tab and selecting a contact from the list of your calls.

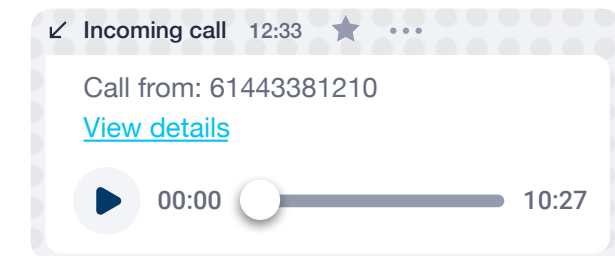
2. Tap on a **'View details'** link of a call you'd like to add details to.




Working with call recordings *

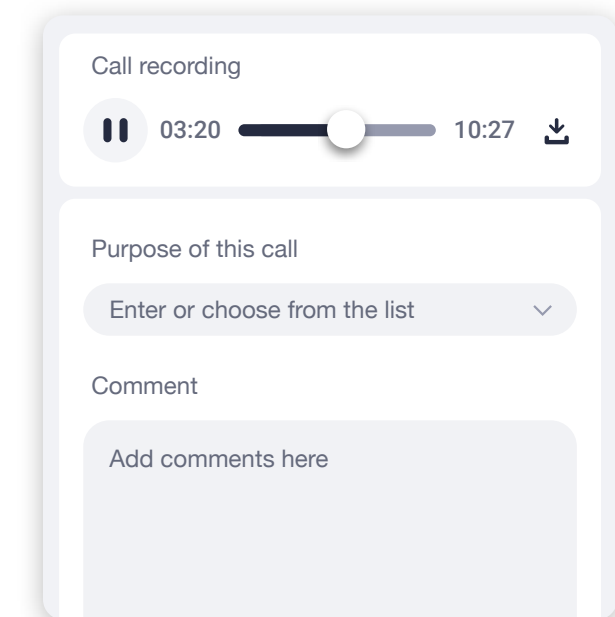
To playback a call recording:

1. Open your conversation history with a contact.
2. Find a call you would like to listen to and press the  icon.



To download a call recording:

1. Open your conversation history with a contact.
2. Find a call a recording of which you would like to download to and press the **View details** link.
3. Click on the  icon to save this call's recording to your computer.



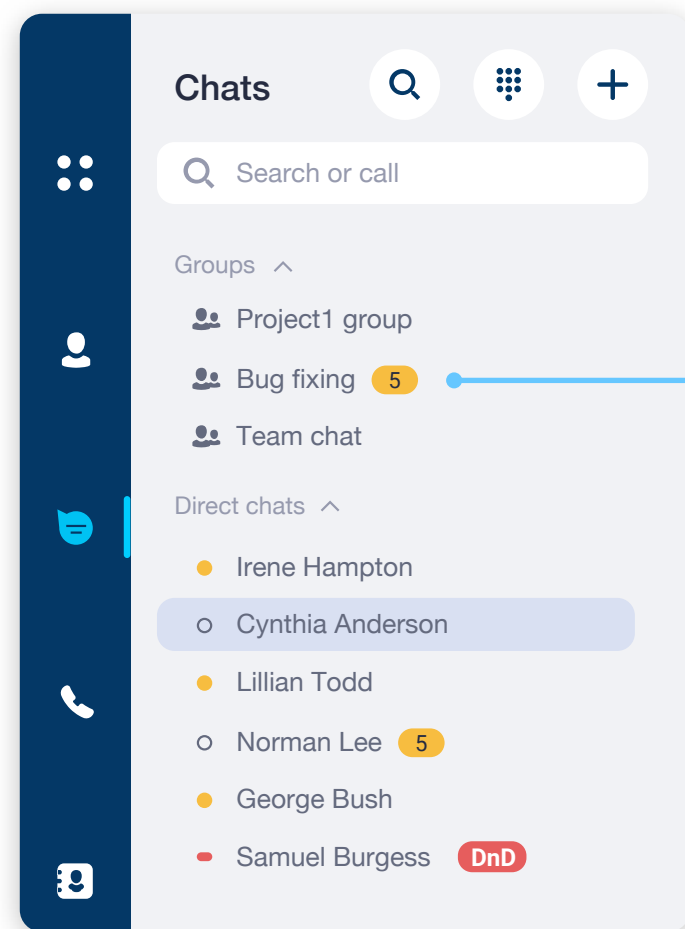
* Please check the availability of this feature with your PBX Administrator.

Chats and messages

Using the desktop app, you can send a text message to a colleague directly via **'Personal'** chat or to a group of colleagues using a **'Group'** chat.

The **'Chats'** tab is where all of your chat conversations, all the messages you've sent and received, are displayed.

It is also where you can create a new **'Personal'**, **'Group'** or **'SMS'** chat.



New messages indication

** Please check the availability of this feature with your PBX Administrator.*

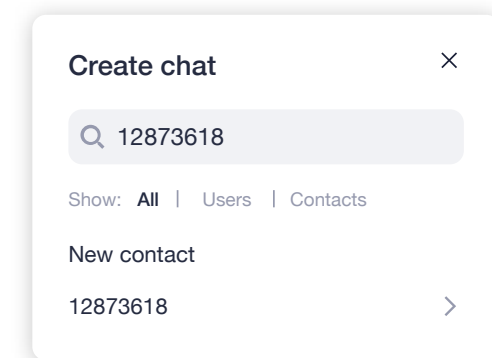
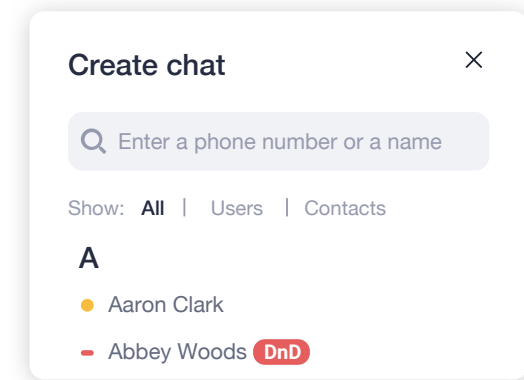
Creating a chat / Sending SMS *

To create a chat or send an SMS:

1. Click on a **+** icon at the right side of the tab name.
2. Choose **Create chat** from a drop-down menu.
3. Select a **User** from the list to create a personal chat.

OR

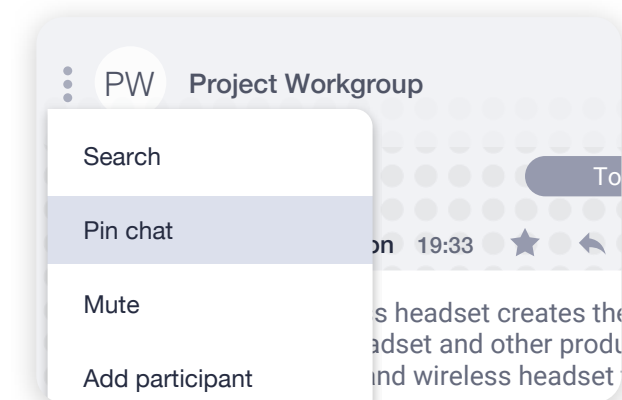
3. Enter a phone number in the search field and choose an external contact to create SMS chat. *



How to pin a chat in the list

To pin a chat:

1. Click on **⋮** icon at top side of the **Chat panel**.
2. Select **Pin chat**. Now, this chat will be listed above the others.
3. Do the same procedure to unpin chat.

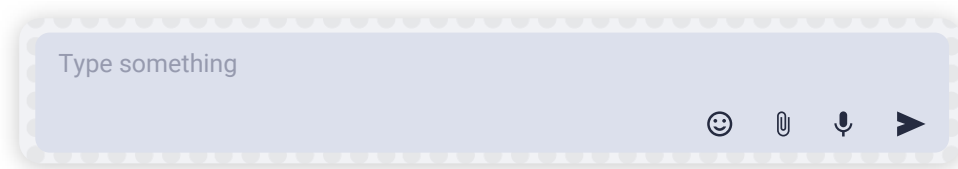


Text messages

There are 3 types of messages in the app:

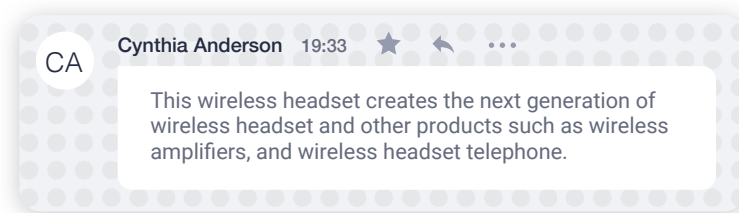
1. Standard text message.

You can send a standard text messages in any personal or group chat. Just enter your message in the input area and press “Enter”.



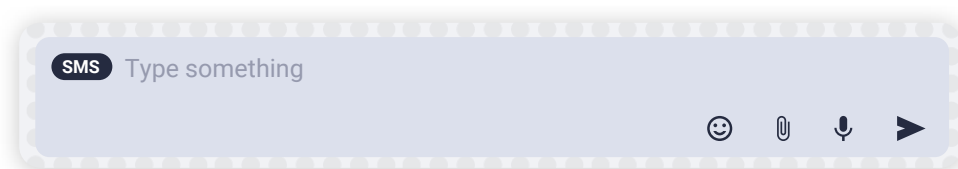
2. Important message.

You can mark any message as **Important for yourself**, so that it will be easier to find it in future. To do this just click the on ★ icon above the message.



3. SMS message. *

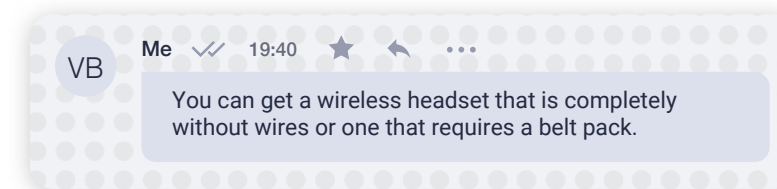
SMS messages can be sent only to external number or extensions. Select extension or contact from **Users or Contacts tab**. If this function available, an SMS label will appear in the input area:



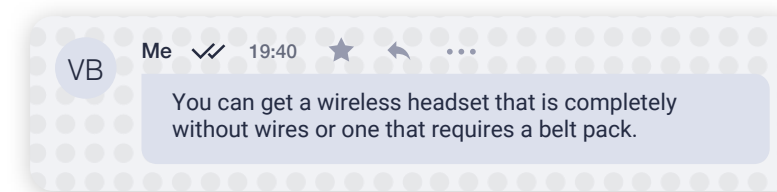
** Please check the availability of this feature with your PBX Administrator.*

There are two types of message status:

1. Delivered ✓✓



2. Read ✓✓




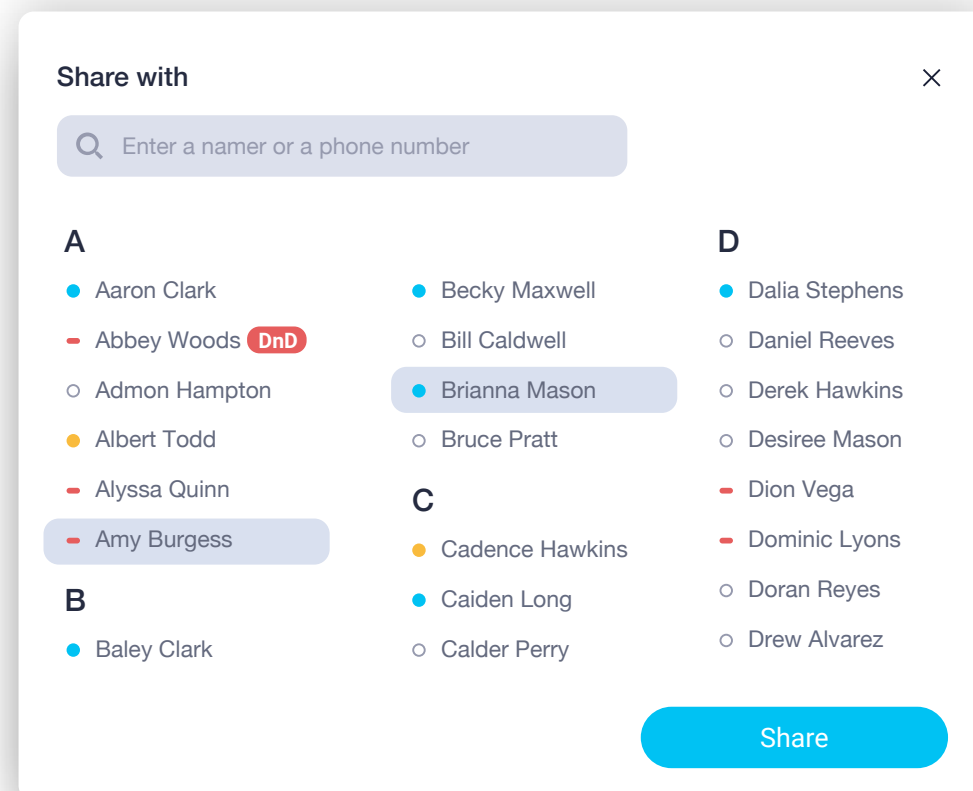
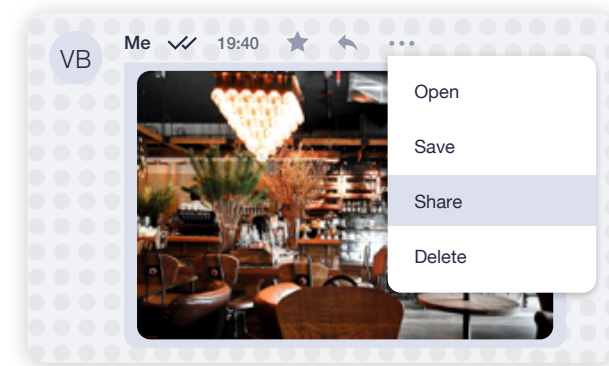
You can also mark your own messages, files or calls as Important for others in a chat.

Note that a proper connection must be established by Admin in order to send SMS messages. If you can't see SMS label, please, contact your organization administrator.

Sharing messages

To share a message, file or call record from one chat to another:


1. Left click on  icon above the message, file or call record you would like to forward.
2. Select Share from the drop-down menu.
3. Choose contacts or a group chats you want to forward message to from the list and click Share.

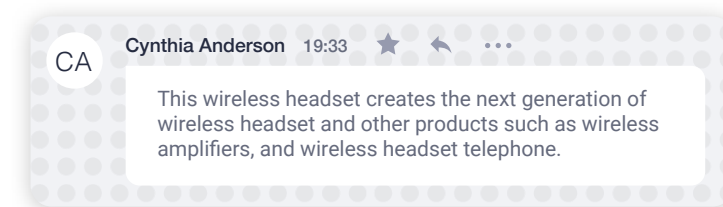


Replying to a message

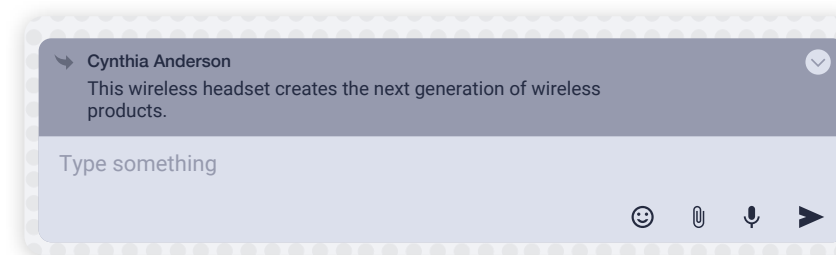
Replying with quotation is used when you want to reply to a specific message in a chat.

To reply with quotation:

1. Left click on  icon above the message which you would like to reply to.



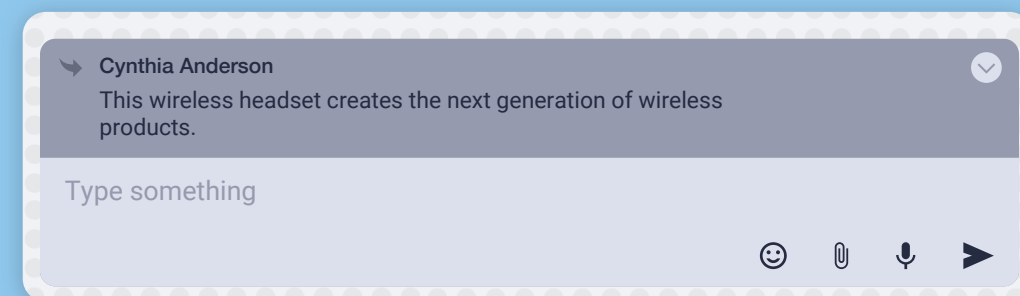
2. You will be able to see the message which you are replying to at the top of the **Message Input Area**.



3. Write your message and press **Enter** to send it.


4. Press ESC or click on  icon to cancel reply action.

You can jump to replied message by clicking on  icon:




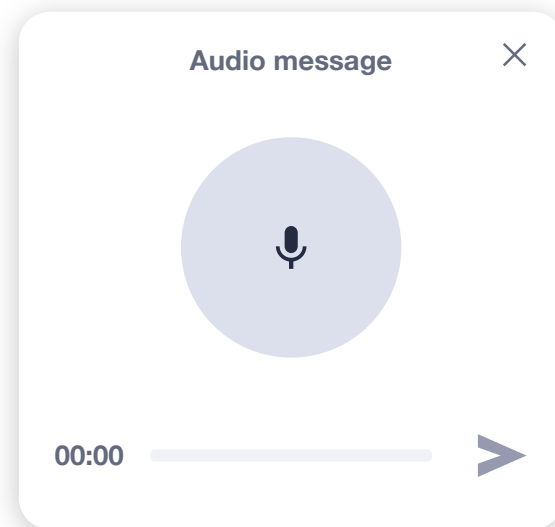
Sending a voice message

To send a voice message:


1. Open the chat with a person you would like to send a voice message to.
2. Click the  icon at the right side of the **Message Input Area**.



3. Click the  icon at the center of the **Message Recording Panel** to start/pause the voice recording.




4. Click on the chat icon  to send your voice message.

To cancel the recording of a voice message, just click on the  icon at the upper-right side of the voice recording panel.

Sending a file

To send a file:

1. Open the chat with a person you want to send the file to.
2. Click on the  icon at the right side of the **Message Input Area**.



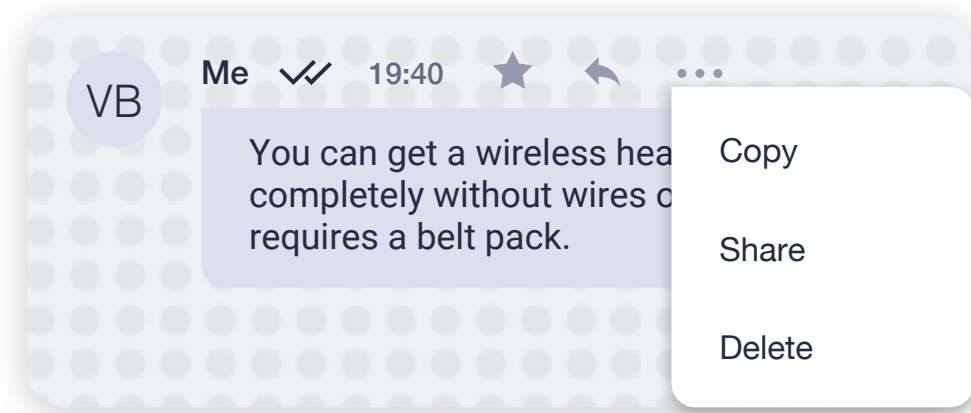
3. Choose a file you would like to send.

You can also use **drag-n-drop** to send file into a chat, and send files, images and text from your clipboard by pressing **Ctrl-V** in the **Message Input Area**.

Remove message, chat history, chat

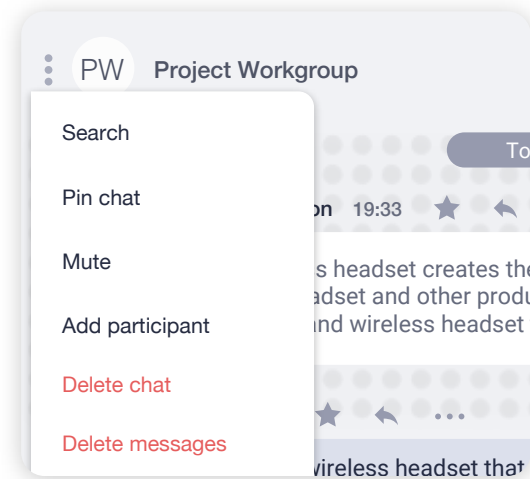
To remove message:

1. Click on **⋮** icon near message you want to delete.
2. Select **Delete** from drop-down menu to remove a message.



To remove chat history or a chat itself:

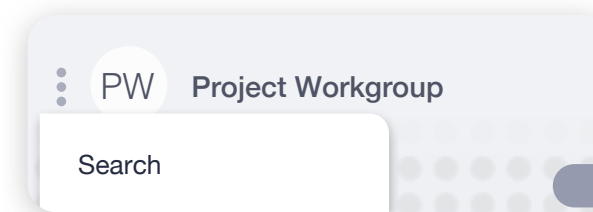
1. Click on **⋮** icon near username or chat name.
2. Select **Delete chat** or **Delete messages** from drop-down menu accordingly.



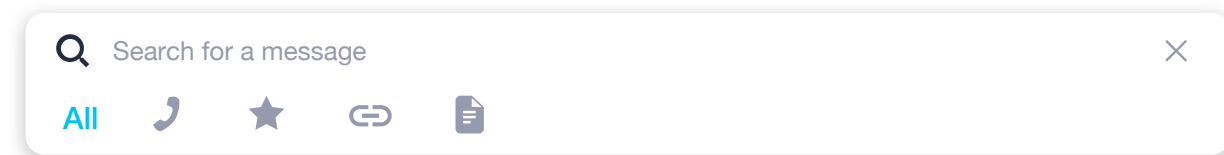
Search in chat

You can search information in chat using various filters:

1. Click on **⋮** icon near username or chat name.
2. Select **Search** from drop-down menu.



3. In **Search** area type keyword to search a message.



You can filter search results by:

- 📞** - show only calls.
- ★** - show only favorite calls and messages.
- 🔗** - show only messages containing web-links.
- 📄** - show only files.

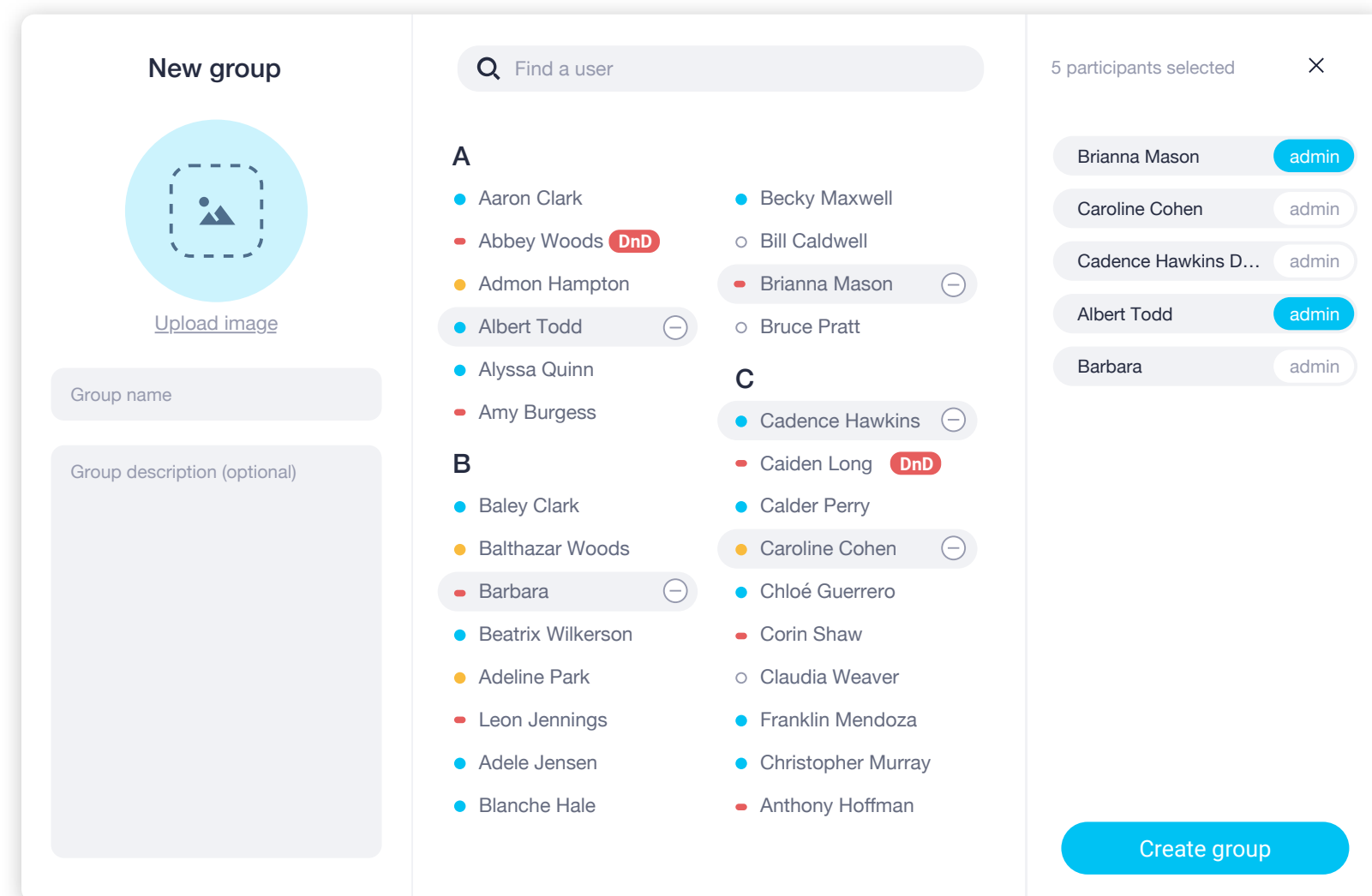
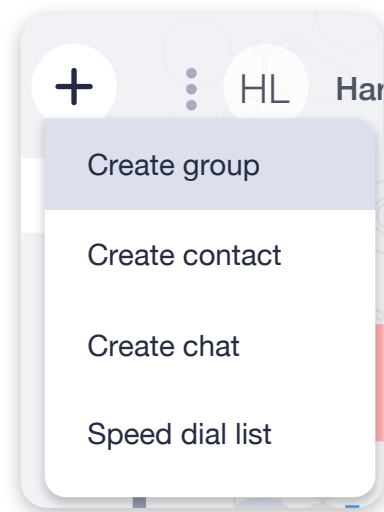
You can jump to timestamp of searched result by clicking on **⋮** icon and selecting Go To in drop-down menu.

Creating a group chat

To create a group chat:

1. Click on a **+** icon at the right side of the tab name.
2. Choose **Create group** from a drop-down menu.
3. In a **New Group window** enter the name of a group chat and choose participants you want to add to a group chat.

Click on **admin** if you'd like to give user admin rights. Highlighted label means user will have admin privileges.
4. Click on a **Create group** button.

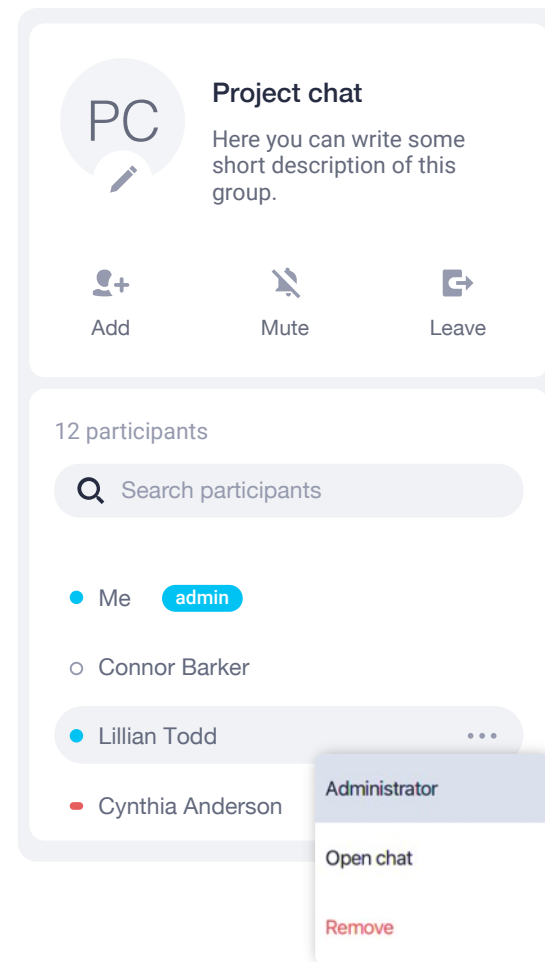


Adding admins to a group chat

You can assign **Chat Admins** only to a group chat which you have created or during chat creation process. A Chat Admin can add and remove participants in a group chat.

To assign a Chat Admin:

1. Open a **Chat Details** panel by clicking on the **i** icon at the top right corner of a chat panel.
2. Click on the **...** icon next to the participant you want to make a chat admin.
3. Select **Administrator** from the drop-down menu to assign or remove admin privileges.

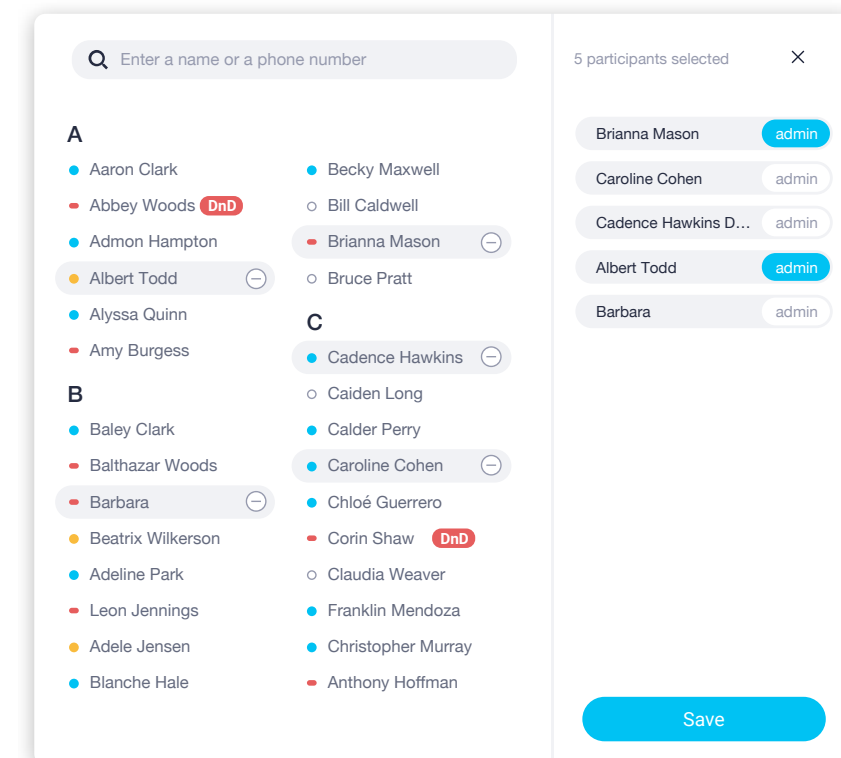
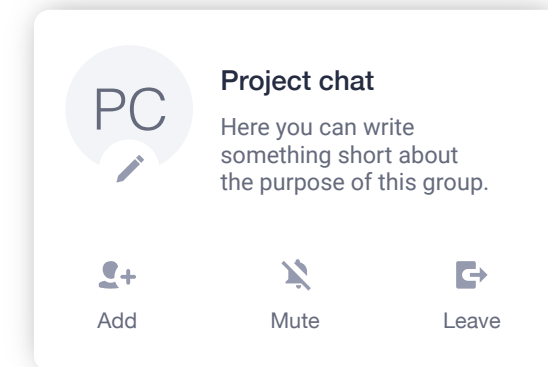


Adding/removing users in a group chat

Only administrators and the one who created the group can add or remove participants.

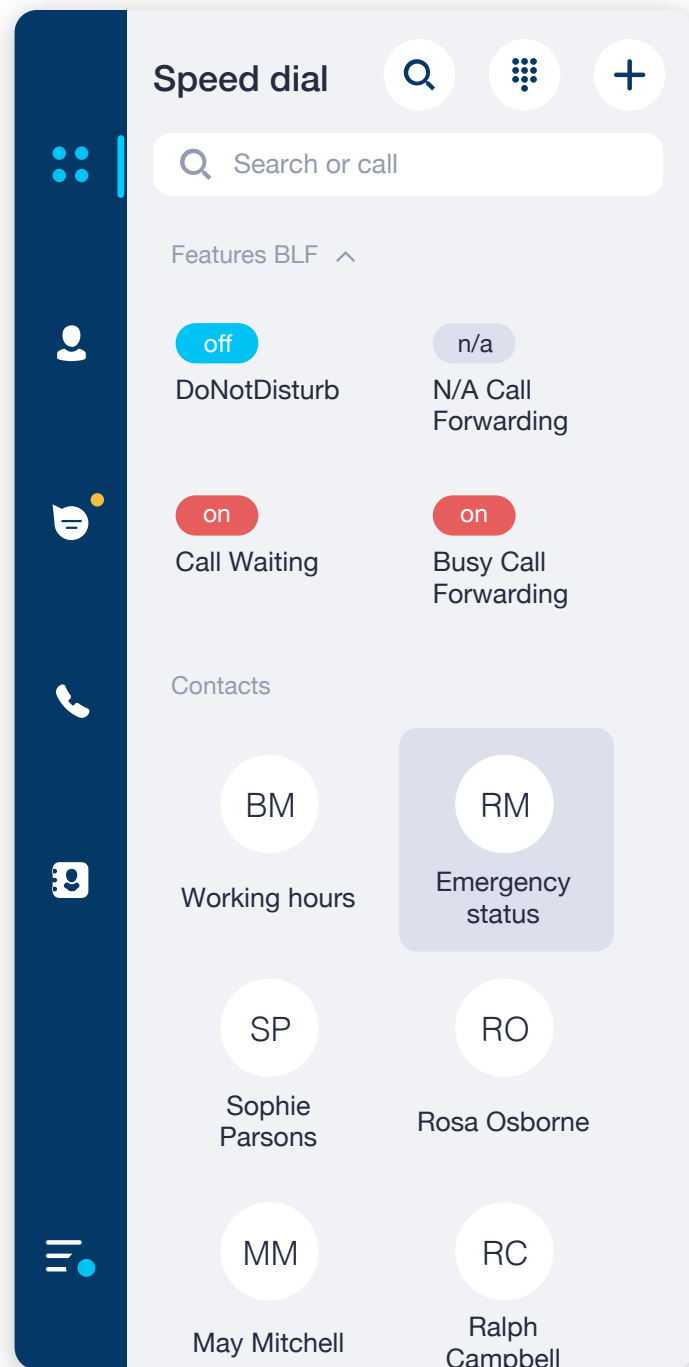
To add/remove a participant:

1. Open a Chat Details panel by clicking on **i** icon at the top right corner of a chat panel.
2. Click on the **+** icon.
3. Click on users to add or the **-** icon next to their names to **remove** them from a group chat.
4. Click on the **Save** button.



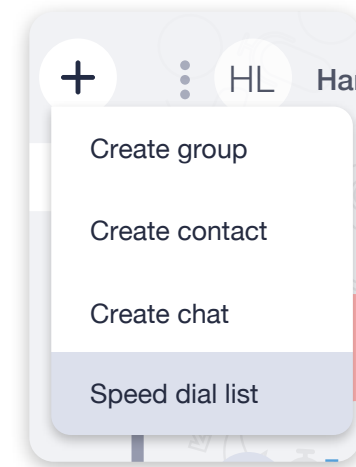
Speed dial

Speed dial list can contain phone numbers for a one-click call and indicators showing states of various features of your phone system.

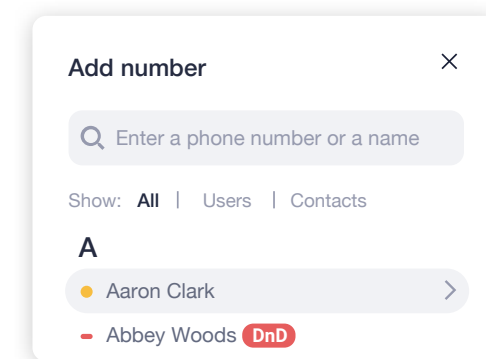


You can add any contact or a phone number to your speed dial list. To do so:

1. Click on a **+** icon at the right side of the tab name.
2. Choose **Speed dial list** from a drop-down menu.

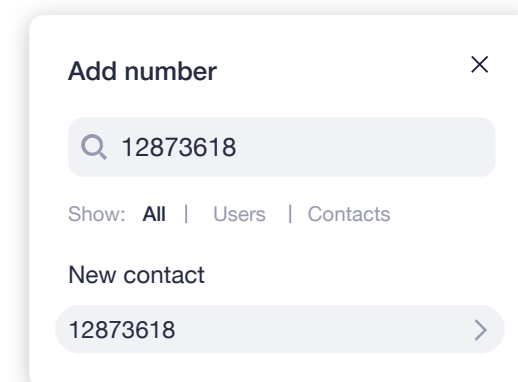


3. In a **Add number window** select which contact or user you would like to add to list by clicking on it.



OR

3. Enter a new phone number in the search field and click on the **New number** item below to add it to the speed dial.

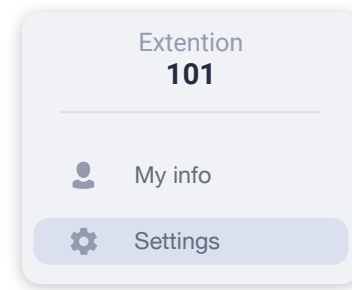


Voicemail

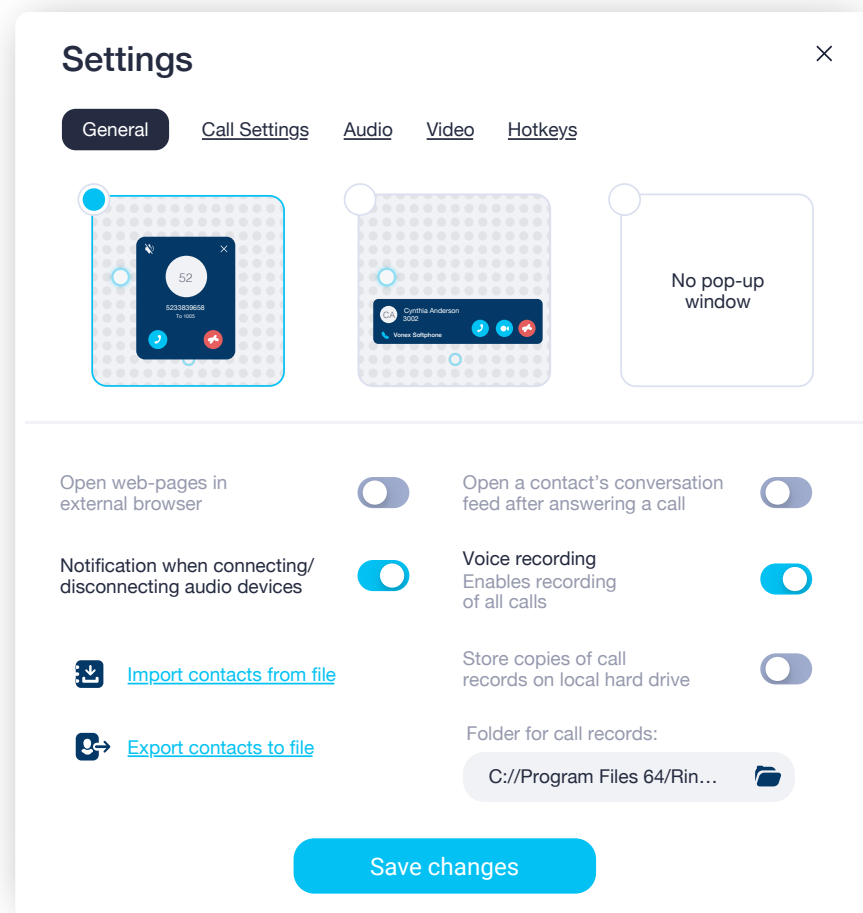
In case you're unable to pick-up a call, you can send it to a voicemail. It can be enabled either in your desktop app or by your PBX administrator.

To enable voicemail:

1. Go to Menu tab.
2. Select **Settings**.





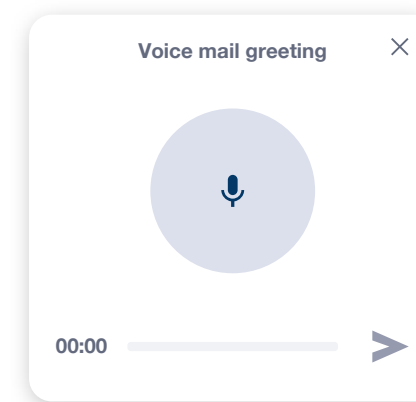
3. In **General** settings tab toggle Voicemail switch ON.




Set voicemail greeting

To record a voicemail greeting:

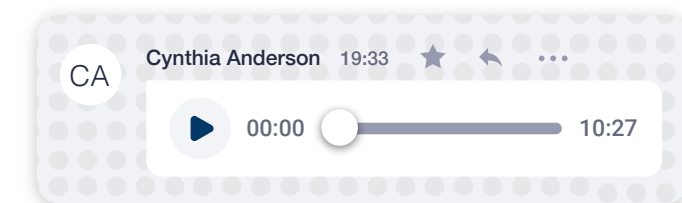
1. Click on  icon.
2. In opened window click on  button to start and stop recording after you finished.



3. Click on  icon to save recorded greeting.

If the greeting isn't recorded, an automated message will be prompted to a caller: "The following number *your extension number* is currently not available. Please call again or leave a message after a signal."

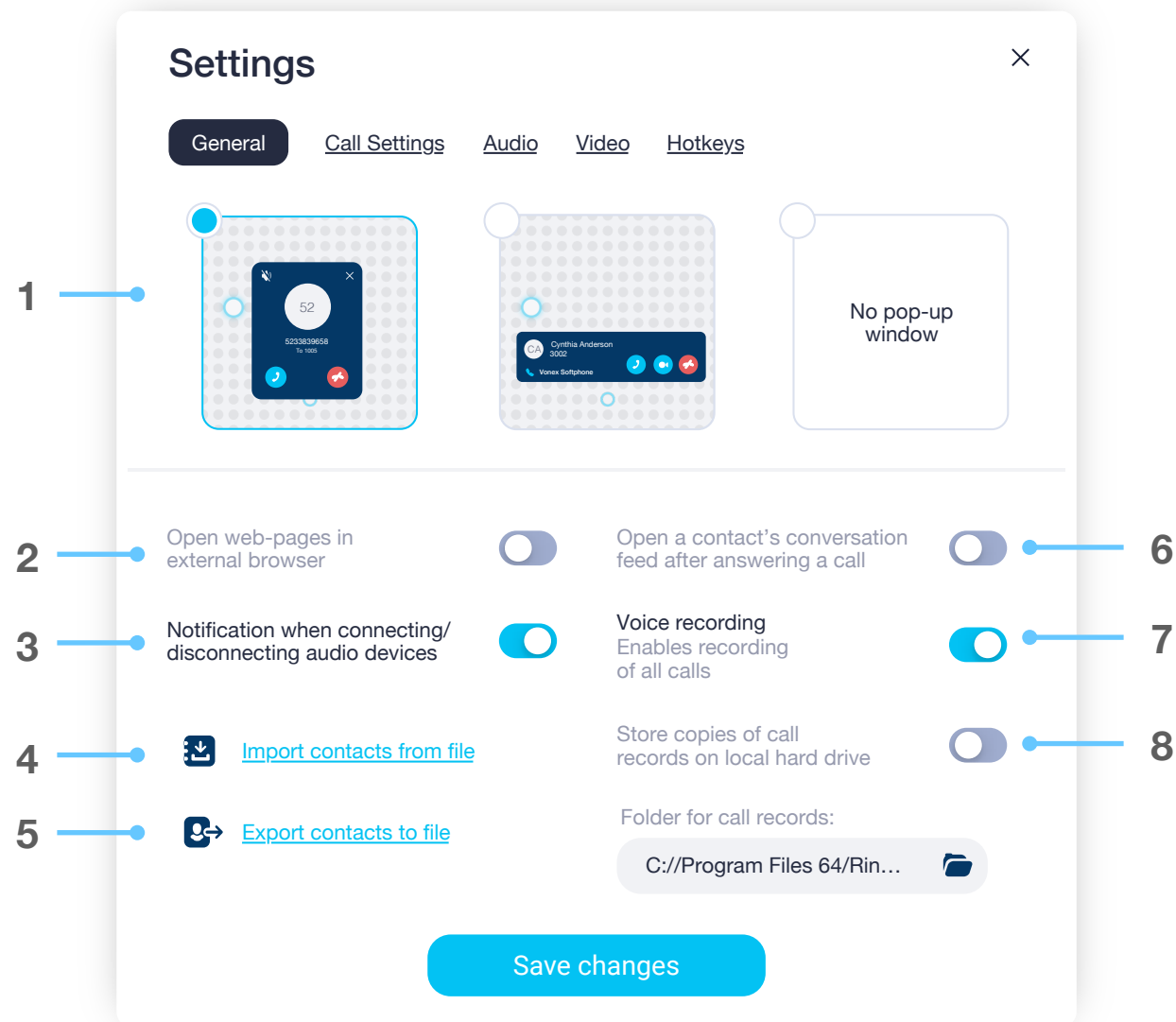
If the Voicemail feature is turned on, your voicemail messages will be displayed in personal chat with a user who called like this:



App Settings

You can configure pop-up window during incoming call, voicemail, trigger auto-recording of all calls as well as storage location for records in **General** section. All forwarding rules, as well as enabling possibility to receive second call can be set in **PBX options**. Device selection for speakers and microphone in **Audio** section. All camera-related features for videocalls can be found in **Video** section.

General Settings

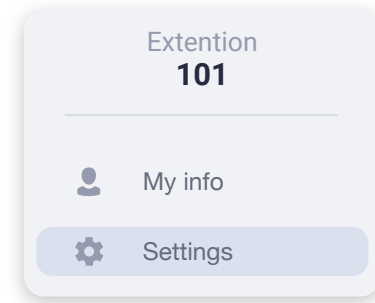


1. Variants of pop-up window during incoming call.
2. Open custom web pages in an external browser.
3. Turns on/off notifications when connecting/disconnecting audio devices
4. Import contacts into the app from a .csv file
5. Exports all contacts from the app into a file.
6. The app will automatically open a contact's conversation feed when answering a call.
7. Turns recording of all calls on/off.
8. Allows to store copies of call records on local hard drive. *

* Please check the availability of this feature with your PBX Administrator.

PBX options

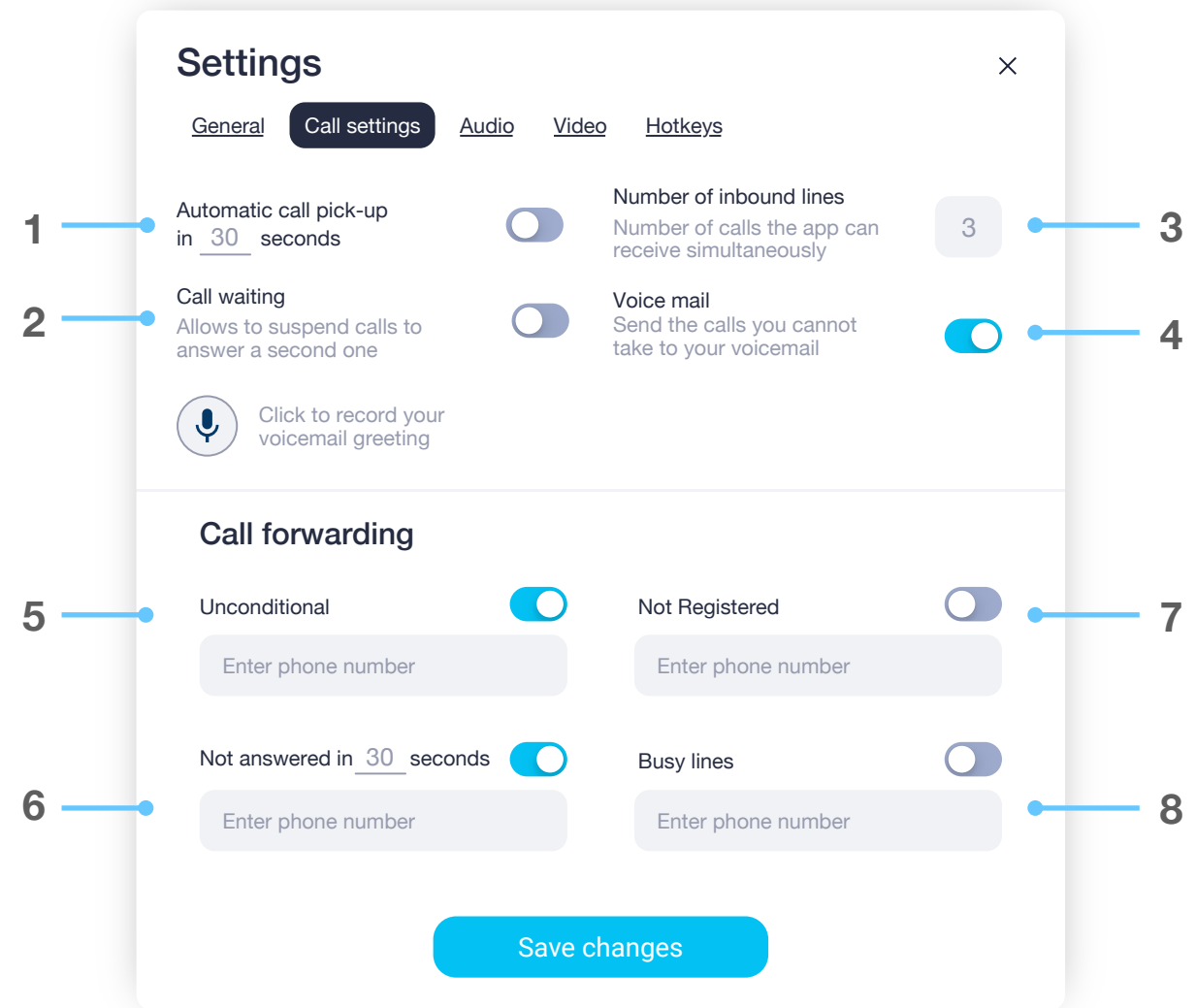
To open the desktop app settings, click on Menu Tab and select Settings item from the list.



PBX features and forwarding rules

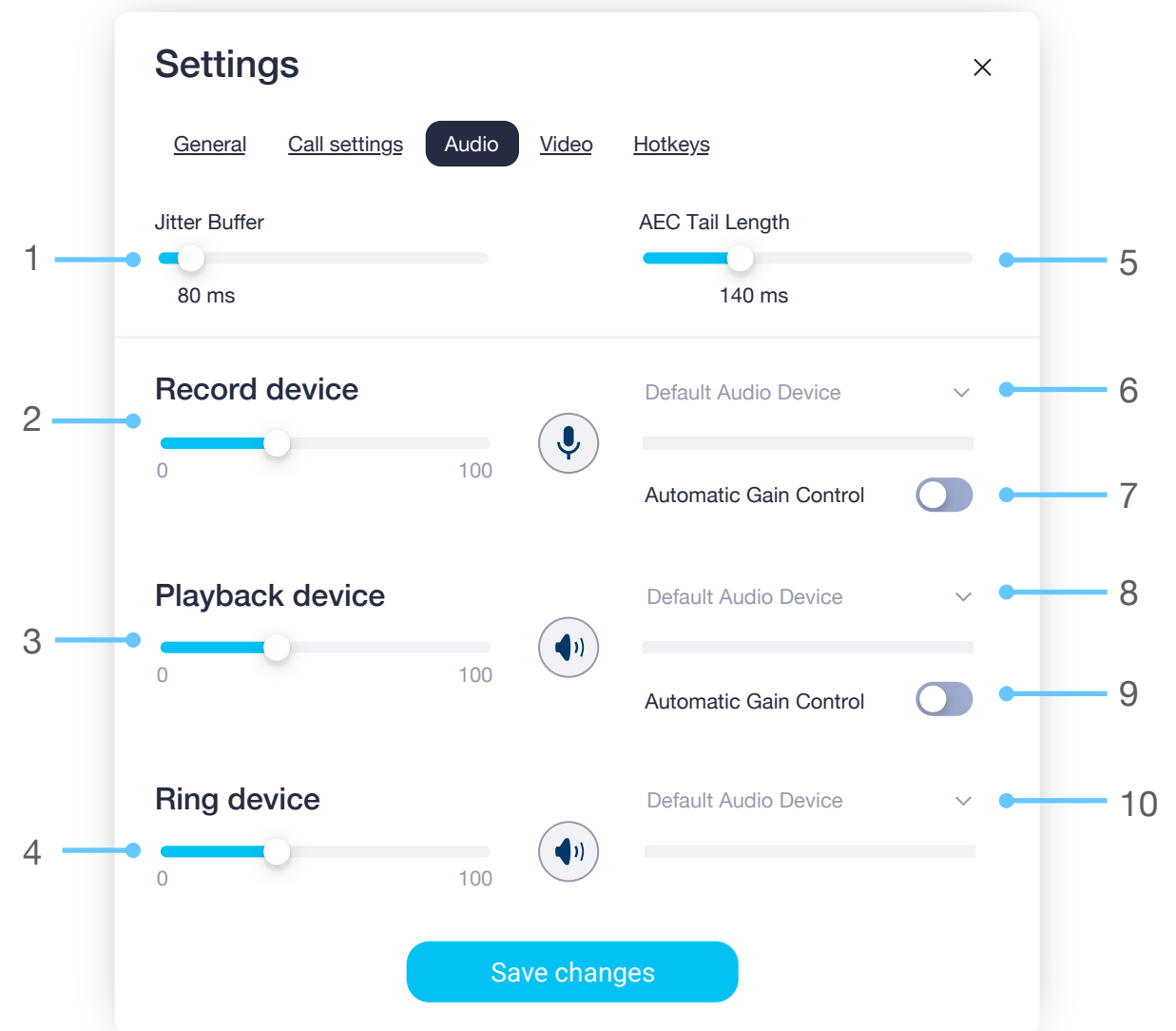
Your desktop app can receive multiple calls simultaneously. The number of calls the app can receive is specified in **Number of inbound lines** box at **PBX options** tab. However, you will need to enable **Call waiting** function first.

1. After specified time automatically pick-up incoming call.
2. **Call waiting** allows to suspend an existing phone call to answer a second call.
3. Number of calls the app can receive simultaneously.
4. Enable/disable voicemail.
5. Turns ON/OFF unconditional forwarding of all your calls to the phone number set below.
6. **Turn ON/OFF call forwarding** to the following number, in case you are not answering the phone within designated number of seconds.
7. Turns ON/OFF forwarding to a phone number when your app is offline.
8. Turns ON/OFF call forwarding to a phone number when all your lines are Busy.



Audio settings

1. Jitter buffer length control (helps to improve call quality in case of unstable internet connections).
2. Microphone level control bar. Next to it – Microphone testing button.
3. Playback device level control bar. Next to it - Playback sound testing button.
4. Ringtone level control bar. Next to it - ringtone sound testing button.
5. Turn Echo Cancellation on/off.
6. Record Device selection.
7. Automatic control of the microphone level.
8. Playback Device selection.
9. Automatic control of the playback level.
10. Ringtone playback device selection.



Video settings

1. Turn on your video camera for testing.
2. Maximum allowed video resolution during a call.
3. Turn on a Restricted mode, which is suited for poor network connection environment.
4. Selected device for video capture.
5. Maximum allowed upstream rate during a video call.

