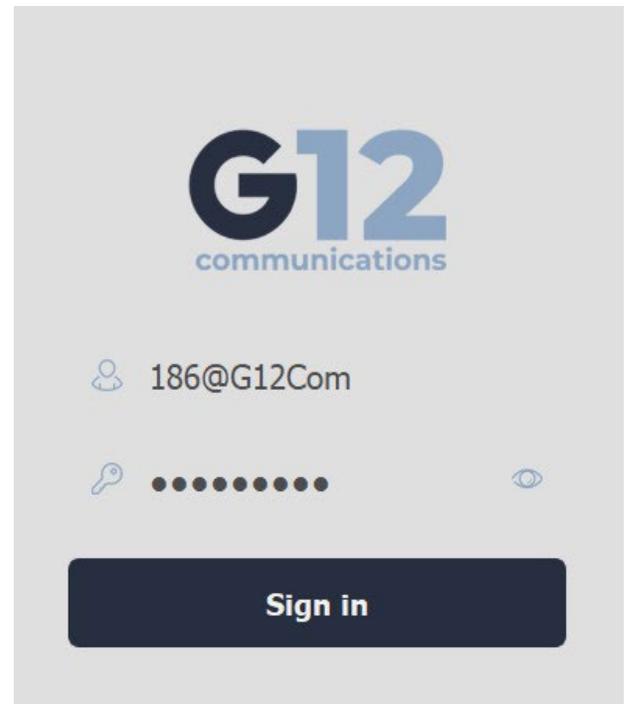


Initial Collaboration Log In and Setup

Once you (or your Admin) have installed the application on your PC/Mac Device you will be presented with a login screen upon launching the application.

Input your Username and password credentials from the welcome email you received. If you have not received this email, please contact your organizations Phone Admin for assistance.

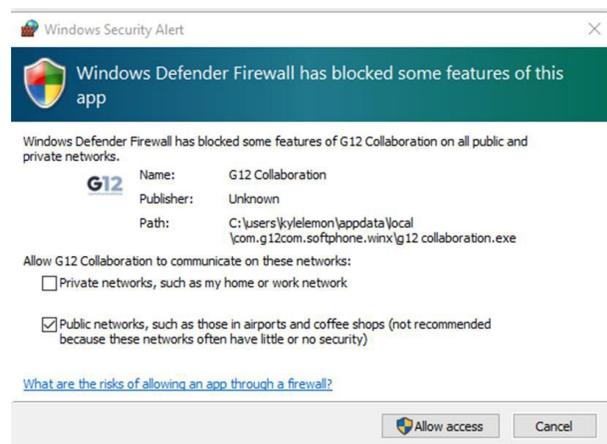
Once you have input your credentials, click on the **Sign In** button.



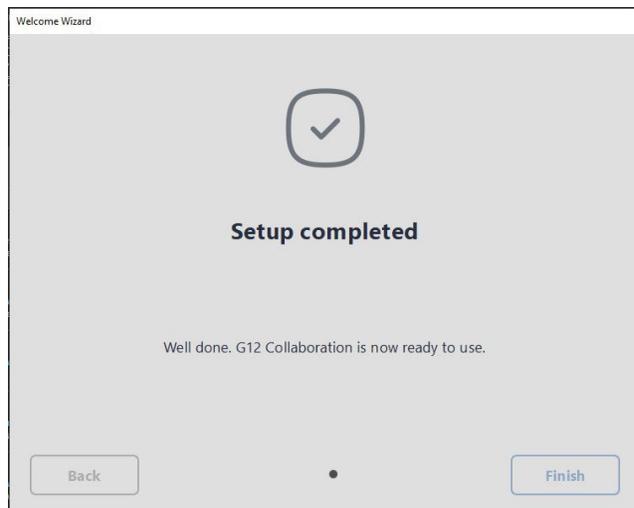
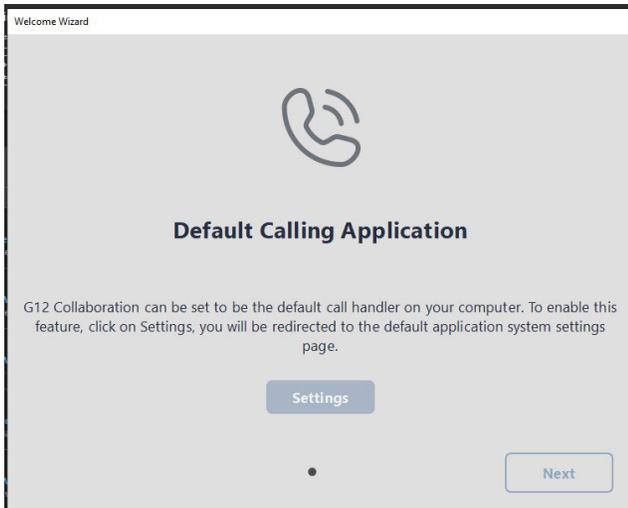
You will then see a downloading progress bar as validation and registrations tasks are completed.



If running on Windows you may receive a popup from windows Defender after a successful sign in and dialer launch, prompting you to allow access for the new application(This may require admin user sign in if you don't have admin rights on your device).



Since this is the first time, you will then see the Setup Wizard popup to walk you through default dialing application and default sound device setting tasks.



Follow the prompts in the wizard to enter or select information and click **Next** -- then click on the **Finish** button to complete the setup wizard process and open Collaboration.

Welcome to Collaboration

Upon successful Sign In and Set Up of the application, Collaboration opens to display your Dialpad section center screen. Your left navigation menu here also offers access to:

Dialpad – Call initiation and handling tools

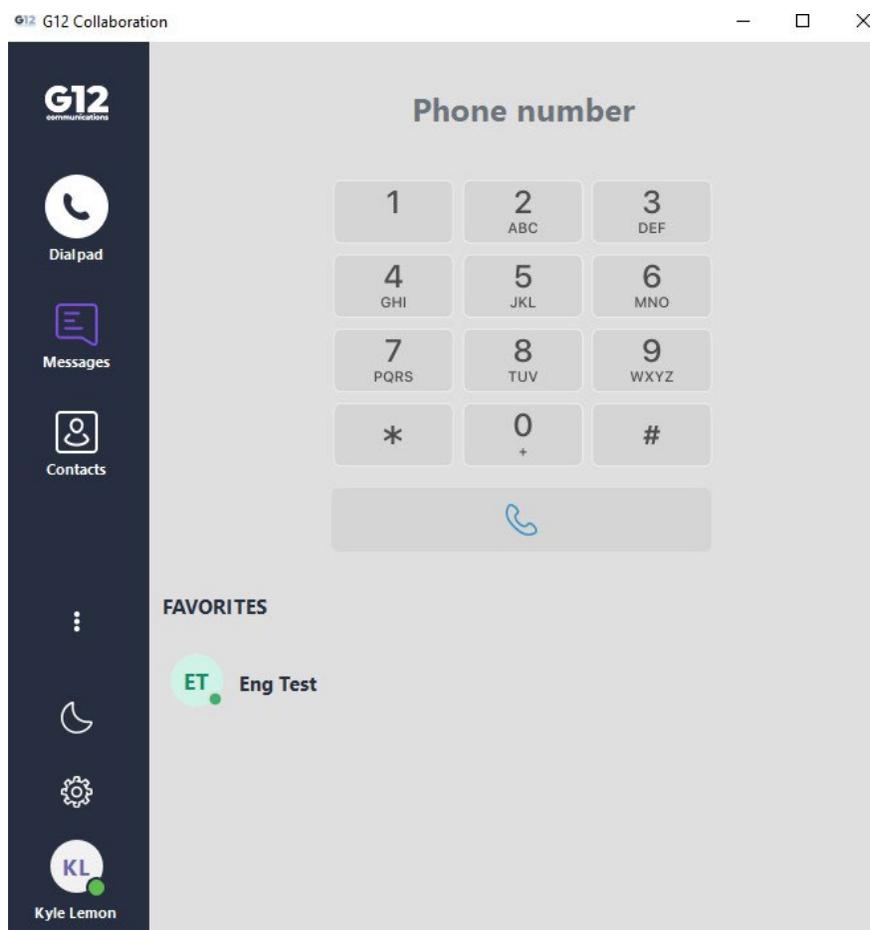
Messages – Your voicemail review and handling tools

Contacts – Find contacts in your directories

More Menu – The 3 dots More menu offers access to view your Portal and your Call Logs.

DND – Turn *Do Not Disturb* on and off.

Settings – Access to review and update preferences and settings - and your Log Out option.



Navigation Features

Dialpad

Click this menu option to view your Dialpad and initiate calls.

Messages

Click this menu option to access any voicemail messages on the server that have not been deleted.

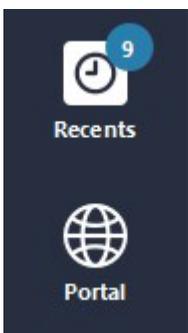
Contacts

Click on this option to access your Contacts directories.

More Menu



Click on **More** (3 dots) to gain access to additional system features and tools.



Click **Recents** to access your historic call logs.

Click **Portal** to open your Portal and use the tools for contact management and answering rule management.

Do Not Disturb (DND)



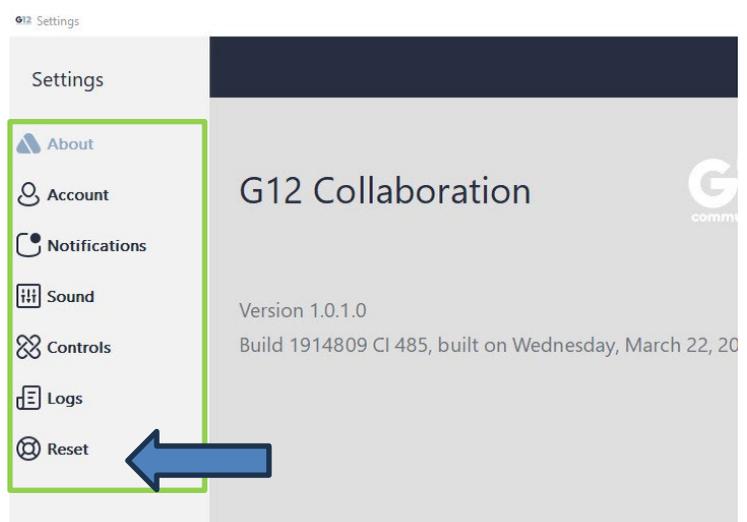
Click the Moon icon to engage Do Not Disturb. This tells the system you are unavailable for calls.

Click the DND button again to disable Do Not Disturb and resume normal receipt of calls. *You can always hover your cursor over this icon to view your current DND on / off status.*

Settings



The settings icon (gear) displays the Settings dialog where users may adjust various settings and preferences for notifications and sounds and view application build version information.



Log Out of Collaboration

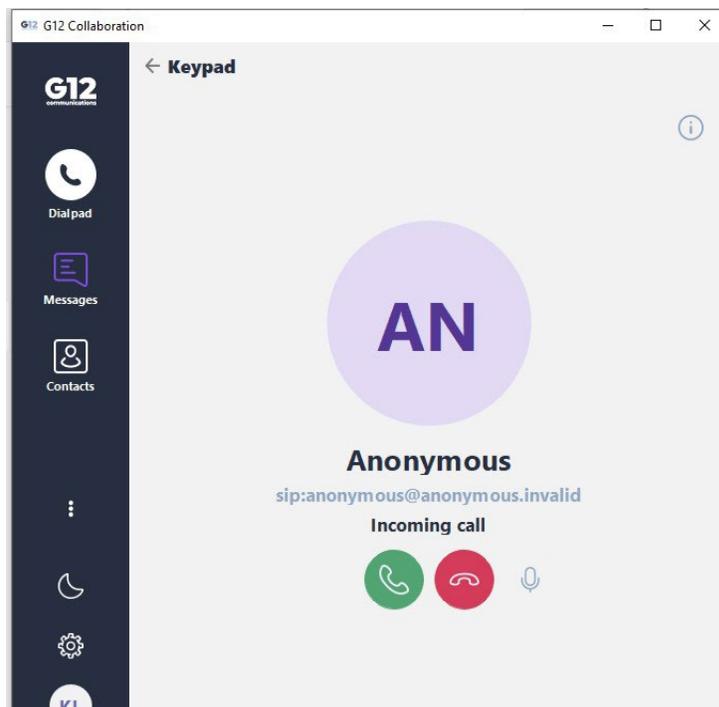
The **Settings** view is also where users may go to log completely out of the application.

To do this, click on **Settings** and then click the option labeled **Reset**.

Call Handling

Answering Incoming Calls

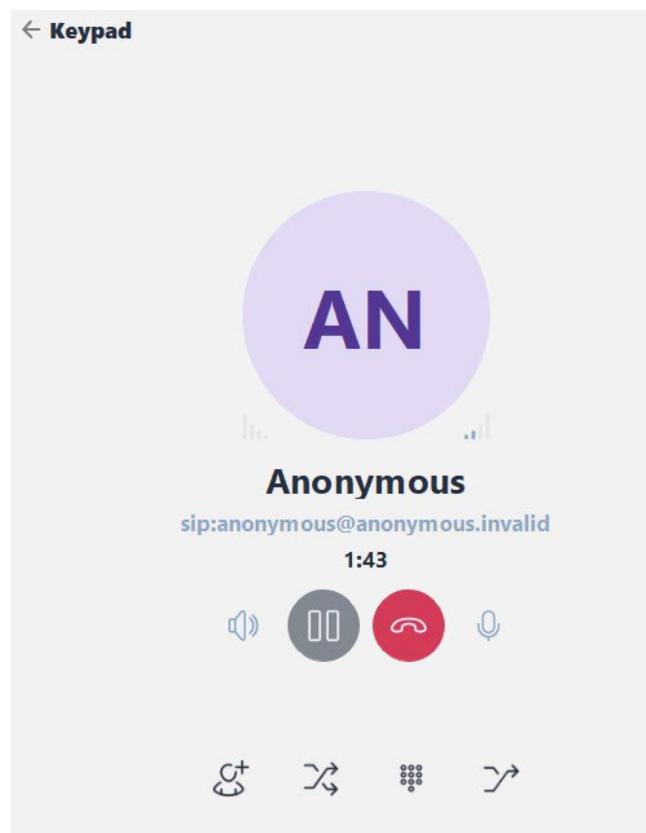
When receiving a call in your collaboration application you will receive a popup with the caller information and an option to **Answer** the call or **Decline**.



To Decline the call, click on the red icon – the call will not be connected to your line. 

To answer the incoming call, click on the answer key to connect the call. 

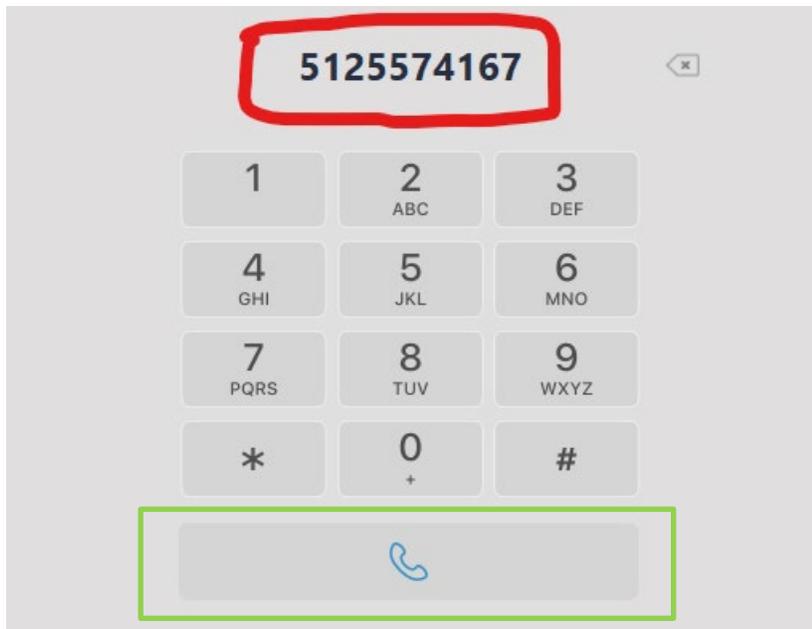
The call will then be connected, and you will have an active call window to manage the call.



Placing Outbound Calls

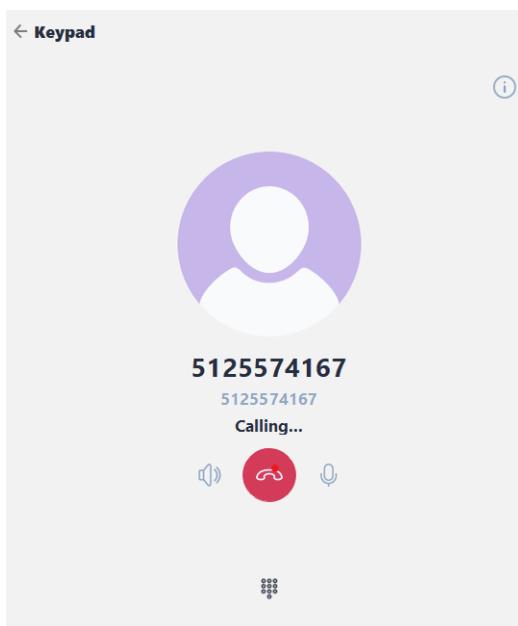
While viewing your Dialpad, you may use your mouse to click on keys onscreen, or you may use the number pad on your keyboard to type in the phone number you want to call.

You may also use copy/paste - If you have a number copied you can right click and paste the number into the field.

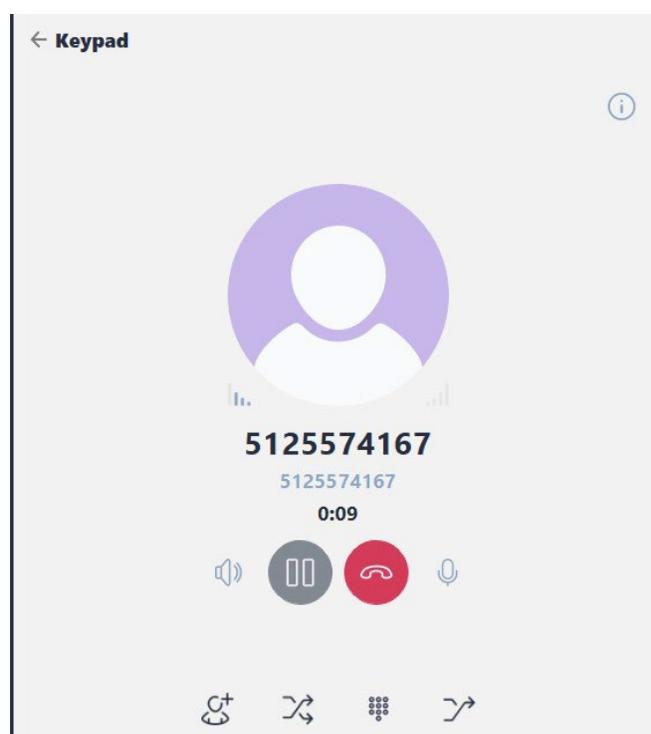


To initiate the call, click on the **handset / Dial** icon to dial the number you just entered.

Once digits are sent, the **Calling** window displays and you will hear the phone ringing via your selected audio source - headset/speaker/headphones.



Once the call is answered, the **Active Call Window** displays your call control buttons to manage the call.

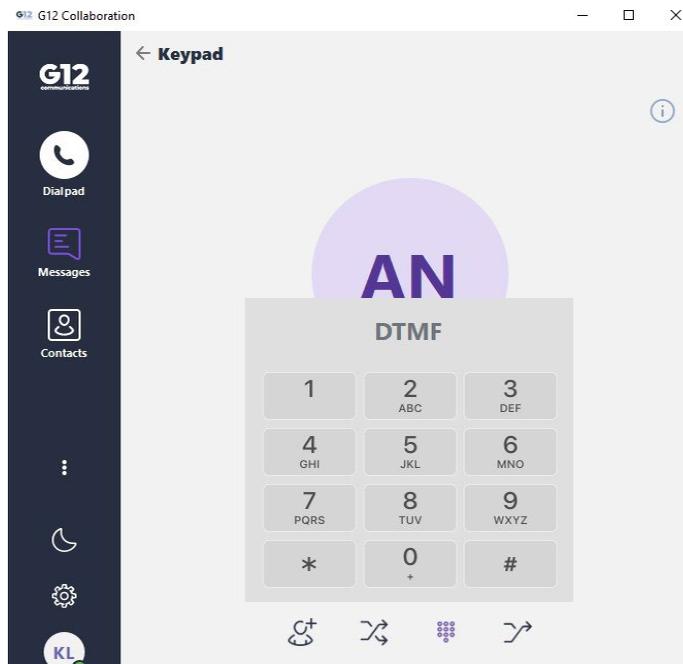


Using the Dialpad During Active Calls

If you reach an automated system and need to enter auto-attendant menu options - or need to input an account number - you may use the DTMF keypad to input those digits.



Click on the keypad icon and then enter the digits as needed.



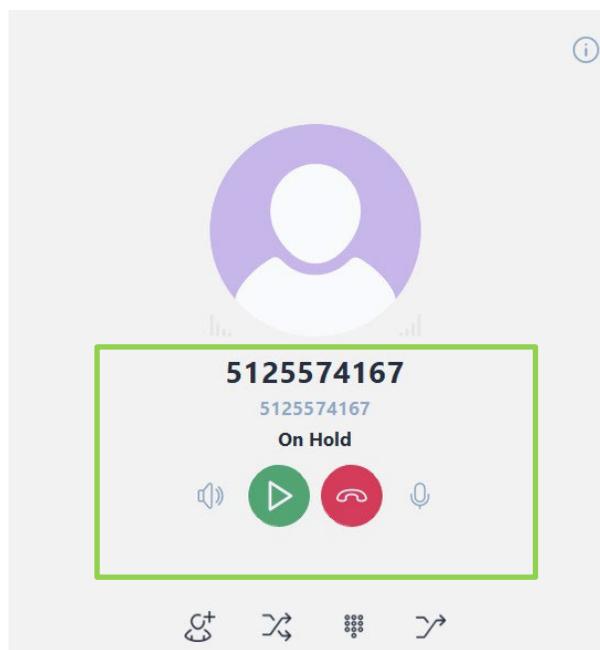
Placing Active Calls On Hold

To place a call on hold, click on the **Pause** icon



The caller will then be placed on hold on your line.

You will also have a visual notification that lets you know call is **On Hold**.



Resuming An On Hold Call

To reconnect to a held caller and resume the conversation, click on the green **Play** button to bring the caller back on your line.



Muting An Active Call



To mute the line for an active call, click on the Microphone icon. Once pressed the input source will be muted and the icon will show a line through it to indicate the line has been muted.



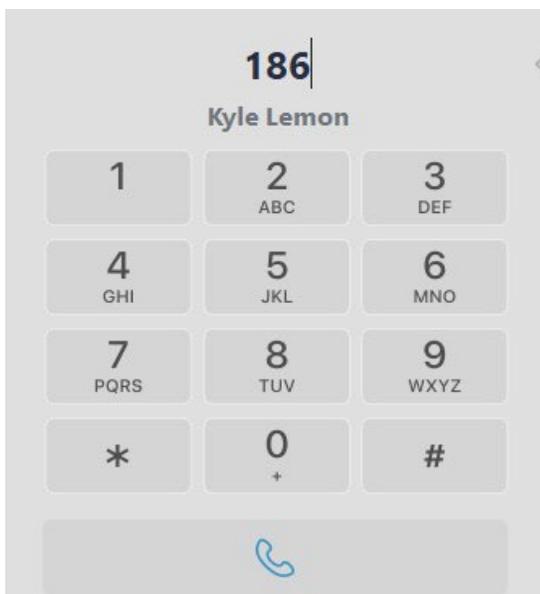
Click the icon with a line through it to UN-Mute and allow your callers to hear you.

Creating a 3-way Conference Call

To add an additional party to an active call in order to create a conference call:

Click on the Add Call icon

The Dialpad displays to allow entry of the phone number or the user extension of a 3rd party to conference into this active call.



Once the desired number or extension has been entered in that field, click on the Handset/Dial button to make a call to party you want to bridge into the call.

Your original active call will be placed on hold while the system connects to the 3rd party.

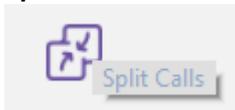


Once the 3rd party answers you will have the ability to click on the **Merge Calls** button on the original active call.

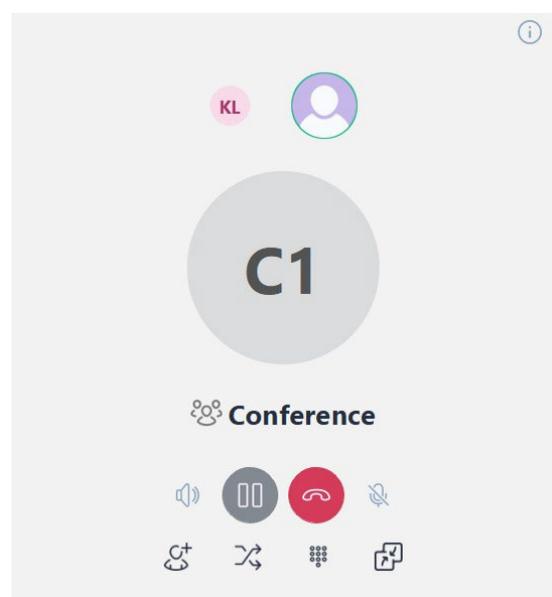
This will merge the 2 separate calls into a single 3 way call.

Once the calls merge you the system displays an active conference call with all participants on the same call.

If you need to split the call into separate calls, click on the **Split Calls** button



This allows you to break the call into 2 separate calls again.



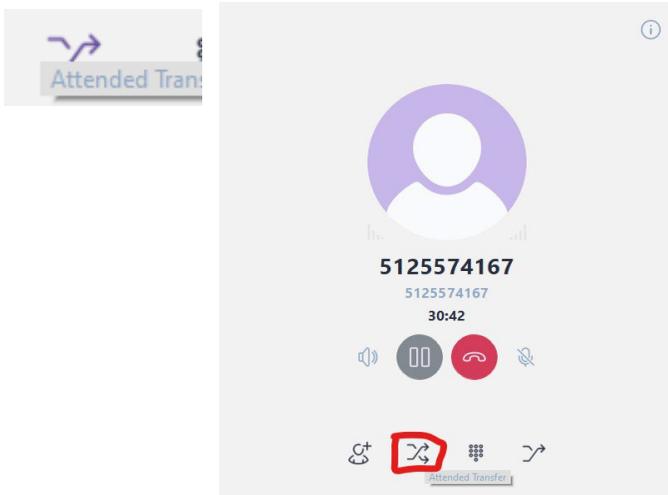
Transferring Calls

If you need to transfer an active call you have 2 methods to move call to another destination or user. either an attended (also known as warm transfer) or a blind (also known as cold transfer). Your display offers two different icons for this. **Attended** or **Blind**



Attended (Warm) Transfer Method

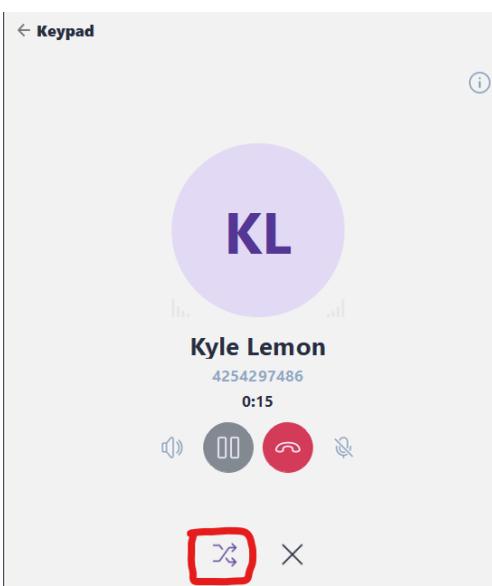
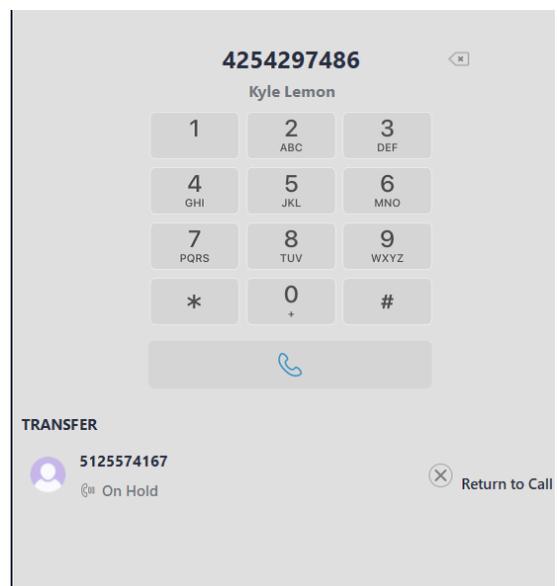
To initiate an attended or Warm transfer, click on the Attended Transfer key.



The Dialpad displays. Enter the extension or the 10-digit number you want to contact to transfer over this call.

Click on the **Dial/Handset** icon to call the transfer recipient. (Your active call will be put on hold at this point)

When the call connects, speak to the recipient and then click on **Transfer** on the original active call waiting on hold to warmly hand the call over to them.



If the party you're attempting to transfer to isn't able to accept the transfer, you can click on the **Hangup** key to cancel the transfer attempt and then return to the caller waiting on hold to **Resume**.



The cancel/X key allows you to place the transfer attempt call on hold. *This is useful if you need to bounce back to the original call to get additional info before completing the transfer of the call.*

Blind Transfer Method

To initiate a blind transfer from the Active Call Window, click on the **Blind Transfer** key.



You will then be presented with the dial pad to enter the recipient's extension or 10 digit phone number. Click on the handset key to initiate the call to transfer destination.

The call is immediately released from your line and sent to destination extension or 10 digit number.

Changing Audio Sources During a Call

While in the active call window you have access to view and select from your audio devices during a call.

Click on the Speaker icon to view your audio options for Speaker and Microphone.

Select an appropriate output or input device option to be able to hear other party and they hear you via the appropriate input device.



Voicemail Management

New Voicemail Notifications

Notifications for new voicemail messages display on your Dialpad screen.

If you don't have any new messages this icon will not be displayed on the Dialpad.

Listening to New Messages

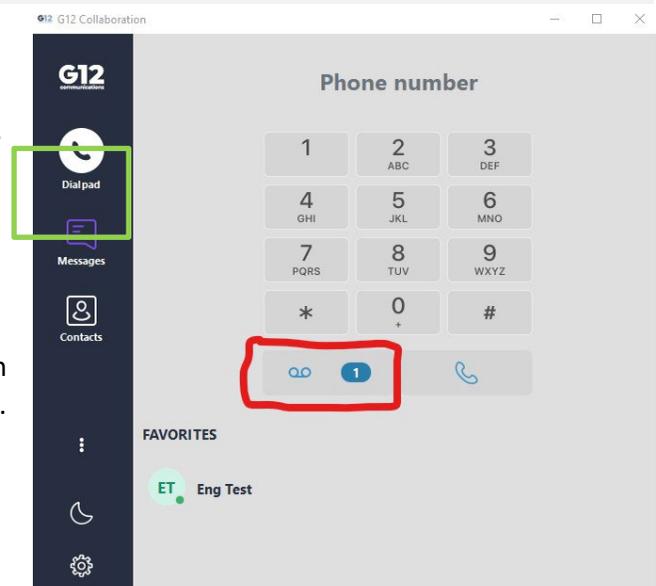
To listen to a new message, click on the **Messages** option in the left menu, or the voicemail icon within the Dialpad. *The phone will auto-dial **5001** to connect to the mailbox on the voicemail server.*

You will be prompted to enter your passcode.



Click on the DTMF key (Keypad/Dialpad icon)

in your keypad to enter your passcode and navigate through the voicemail menu to listen to any available new voice messages.



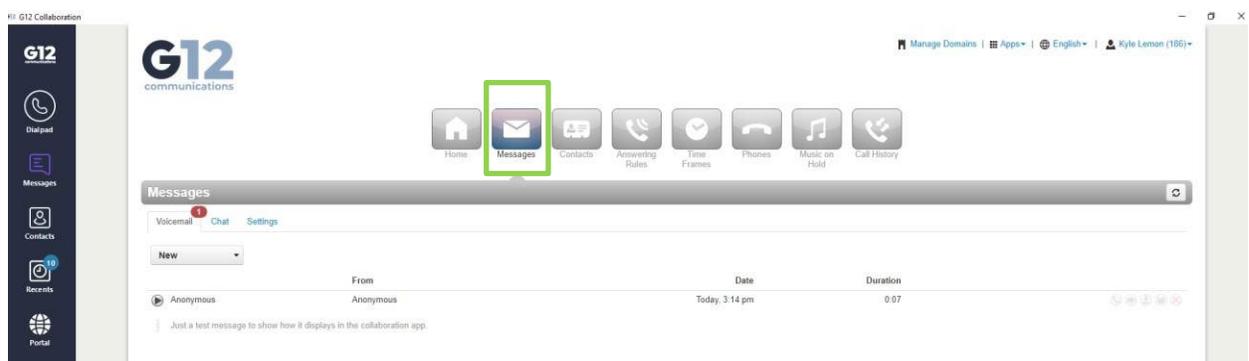
Reviewing Old Messages

If you don't have any new messages but want to access voicemail to listen to an old message, dial 5001 from the Dialpad screen to call into the voicemail server and listen to any saved messages.

Alternatively, you can access the portal from within the Collaboration app to listen and playback messages from portal directly.



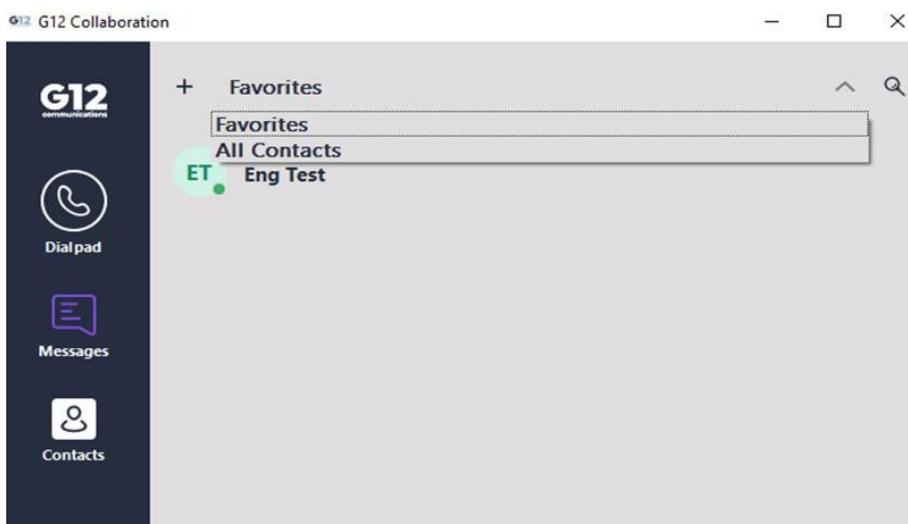
Click on the Portal menu option and then choose the **Messages** menu to view those still in history. Click on the one you wish to review.



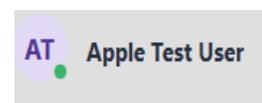
Contact Management

Contacts from your profile can be accessed from the **Contacts** widget and are filtered and grouped by favorites or All contacts.

Simply click the dropdown next to the category you desire to review to find a contact within that list.



The Contacts widget will allow you to see if a contact's device is online and available to take a call (green dot).



If the line is busy the user's card will have a red dot / On Call indicator if they are in an active call.

