

daisy.
PhoneLine+



daisy.

COMMUNICATIONS



Daisy PhoneLine+ User Guide

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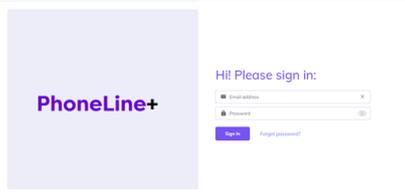
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● **Action:** Items in orange text are actions you must take to complete the tutorial.

● **Terminology:** Items in blue text are terms found on the Daisy PhoneLine+ app; these could be the title of a screen or the label on a button.

Introduction to Daisy PhoneLine+

Click to
download
Daisy
Phoneline+

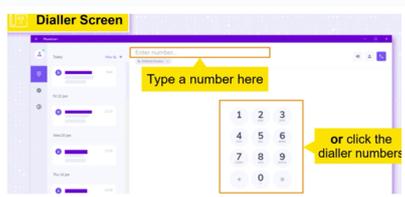


Setting up Daisy PhoneLine+

Once Daisy have provisioned your Daisy PhoneLine+ order, you will receive an email to set your password and a link to **download the Daisy PhoneLine+ app**. Once downloaded, **open the Daisy PhoneLine+ app** and **log in** with the details you have just set. If you forget your password **click Forgot password?**

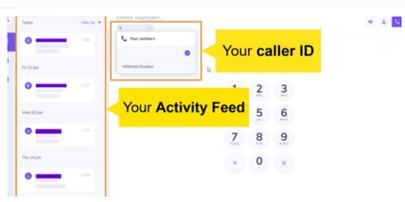
Making Calls

When you first log in, the first thing you will see is the **Dialler Screen**. Either **type the number** in at the top where it says **Enter Number** or **click the dialler numbers**. Once you have entered the number, **click the handset icon** at the top right to make the call.



Activity Feed

Your recent call history and your missed calls will be shown on the left-hand side of the screen. This is called your **Activity Feed**.



Caller ID

Select the drop-down box titled **Your Numbers** to **select a number** you would like to call from. This will be your **Caller ID** and will be the number recipients see when you call them.

Contacts

You can manage your contacts by **clicking the user icon** in the top right of the screen. Here you can:

- Add new contacts or share your contacts with other users.
- Call your contacts directly.
- See your recent contacts or import contacts.



Settings

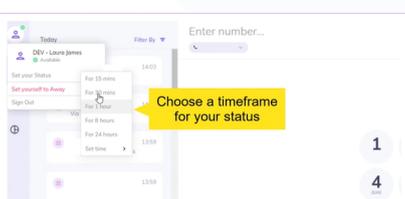
Click the cog icon on the left side of the screen to configure your Daisy PhoneLine+ settings such as:

- What happens if a call is not answered?
- Scheduling **Out-of-Hours Messages** and times.
- Adding customer **Hold Music**.
- Managing devices attached to your account.



Analytics

The bottom left icon opens the **Analytics Screen**. This offers a summary of all inbound, outbound and missed calls. This provides a comprehensive insight into how each user and your Daisy PhoneLine+ account is performing.



Setting Your Status

Change your status by **selecting the user icon** in the top left. You can set your status to **Available** or **Away**. This is also where you can log out.

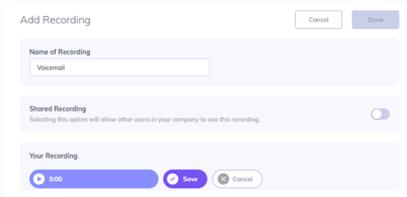
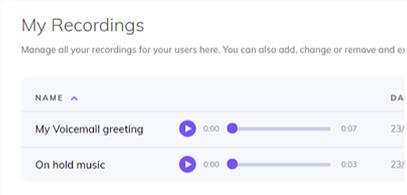
Adding and Sharing Recordings

Introduction

My Recordings are custom audio recordings that can be added and shared with members of your organisations and used for **Hold Music**, A **Voicemail** greeting or **Out-of-Hours Messages**.

My Recordings

To find recordings, **click the cog icon** on the left-hand side and **go to Recordings**. Your uploaded recordings appear at the top of the screen. **Click the play icon** to replay them if you wish. If you want to share this recording with other Daisy PhoneLine+ users in your organisation, the toggle is on the right.



Adding a New Recording

To add a new recording, **click the Add Recording button** at the top right in **Recordings**. Give your recording a name for example **Voicemail**. You can record a new audio clip or upload one from your device. To record, **click the recording button twice** and speak into your microphone while the timer is counting. When you are done and happy with your recording, **click Save** to add it to your library or **Cancel** to try again or exit.

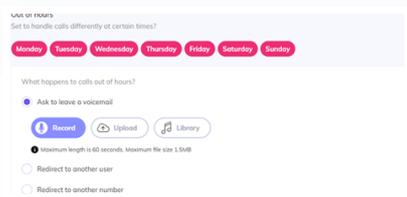
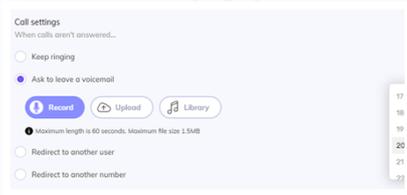
Click Upload to search for recordings you would like to use from your computer or device. Once you've uploaded your audio recordings you can **click the toggle** to the right of the recording to share them with you organisation so that other Daisy PhoneLine+ users can also apply them to their call settings. The maximum length of your recording is 60 seconds. The maximum file size is 1.5MB.

Applying Recordings to Call Settings

When Calls Are Not Answered

Once you are happy with your audio recordings or have found any shared recordings you would like to use, you are ready to apply them in call settings.

On your settings panel **click Calls**. If you wish to set up a voicemail recording for callers to hear, **click Ask to Leave a Voicemail**. Here you can record a new voicemail greeting, upload one from your computer or device, or choose one from your **Organisation's Library**. Choose how long you want the caller to wait when they make a call until your voicemail message plays on the right-hand side.

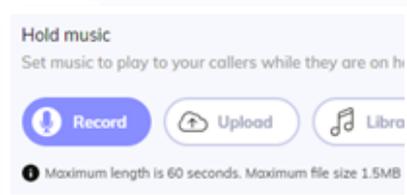


Out-of-hours

You can also record an **Out-of-Hours Message** or upload one from your computer or device or choose one from your **Organisations Library**. **Select Ask to Leave a Voicemail** and this will send calls to your customised voicemail message when out-of-hours.

Hold Music

Scroll down to Hold Music and here you can record a message to play when customers are on hold or upload one from your computer or device, or choose one from your **Organisation's Library**.



Administrator Settings

Introduction

Daisy PhoneLine+ administrators have additional functionality on their accounts such as: adding, editing and deleting other Daisy PhoneLine+ user accounts; adding, assigning and unassigning numbers; blocking numbers for all accounts (inbound and outbound) and amending company settings.

Adding a New User

When you log in **click the cog icon**, under **Administrators** **click Users**, in the top right **click Add User**. Fill in the new user's details and select whether or not you would like the user to be an administrator. If you receive a message saying **Unable to Create User**, please contact Daisy Comms to add a new user. The number of licenses you take out at point of sale will be the number of licenses you are limited to.

Editing a User's Account

Once your new user account has been created, their name will appear on the **User** page. This will be sorted alphabetically. **Click on their name** to open their **Account Settings**. From here you can:

- View any numbers assigned to the user.
- Amend the account's **Permissions** for outbound calls.
- Amend the account's **Call Settings** (this will override the user's settings).
- Amend the account's **Out-of-Hours** settings.
- Delete the account.

Adding Numbers

You can add geographical and non-geographical numbers that will be available to use straight away. Under **Administrators** **click Numbers**, this will show a list of all numbers assigned to your company. To add a new number, **click Add Number** in the top right of your screen. Fill in the details of which number you would like to add. **Select a number** from the list and **click Done**. You will then need to assign the number to a user.

Assigning Numbers

The number you have just created will appear on the **Numbers** list. Under **Assigned** it will say **Nobody**. **Click on the number**, **click Assign**, **select the user** to whom you would like to assign the number and **click Done**.

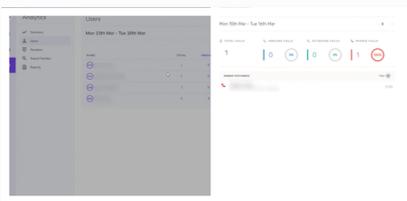
Blocking Numbers

Go to Privacy under the **Administrator Settings**. Here you will see a list of all numbers you have blocked, inbound and outbound. To block a new number, **click Add Blocked Number**. Fill in the number you would like to block, select if you would like to block inbound, outbound or both, then **click Done**. The number will be instantly blocked.

Global Settings

Here you can change your company name. Please **do not change** this as this should be the same as your Daisy account number. You can also set your company's default **Hold Music** (see **Sound Settings**). Any audio you add in the **Administrator Settings** will override all users **On Hold Settings**.

Analytics and Reporting



Introduction

Daisy PhoneLine+ has an **Analytics Screen** which shows a summary of inbound, outbound, missed, and total calls. Once you log into your Daisy PhoneLine+ account, **click the pie chart icon** on the left-hand side. **Search Numbers** and **Reports** are only available to administrators.

The Summary Screen

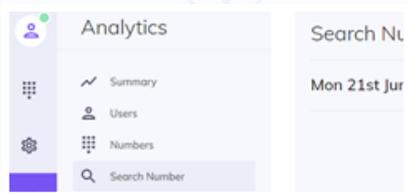
The **Summary Screen** shows the total number of inbound, outbound and missed calls. You can display these either as a line graph or bar chart by **selecting the graph icons** at the bottom of the screen.

User Analytics (Administrator Only)

Administrators have to select and view analytics of other Daisy PhoneLine+ users in their organisation. **Click on Users** to see a list of your company's Daisy PhoneLine+ users, their total inbound, outbound and missed calls. **Clicking on the user** will show a **Snapshot** of these stats. You can filter by date range or find specific call information.

Number Analytics (Administrator Only)

Administrators have the option to select and view the analytics of other Daisy PhoneLine+ numbers in their organisation. **Click Numbers** rather than **Users**. Here you will see list of all numbers in your organisation. **Click on a number** to see a **Snapshot** of analytics. You can again filter these by date range or find specific information.



Search Number (Administrator Only)

Use the **Search Number** screen if you are looking to filter information relating to a specific number. You can search a number and you can find out how many times a number has called you and the details of the calls.

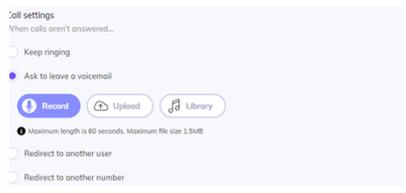
Reports (Administrator Only)

Daisy PhoneLine+ has its own reporting feature which is only available for administrators. From the Analytics screen **click Reports** then **Create**, and **Create a Report**. Name your report and fill in the details you require for your report and **click Create**. Once created, you can download the report from your reports section.

Call Settings

Introduction

Call settings can be adjusted on Daisy PhoneLine+ to determine what happens to a call if you are unable to answer it. Your call settings will also allow you to amend your **Out-of-Hours** settings and **Hold Music**.

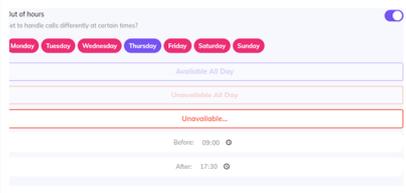


Call Settings

Under the **Settings** cog on the left hand side when you log into Daisy PhoneLine+, **go to Calls** and you will see **Call Settings**. Here you will see four options:

- **Keep Ringing:** the call will continue to ring until it is answered or the caller hangs up.
- **Ask to Leave a Voicemail:** here you have the option to record, upload or choose a pre-recorded voicemail.
- **Redirect to Another User:** this option allows you to redirect unanswered calls to another Daisy PhoneLine+ user.
- **Redirect to Another Number:** this option allows you to redirect unanswered calls to another number.

On the right-hand side, you can **select how many seconds** you would like the call to ring for before the call goes to voicemail or redirects.



Out-of-Hours

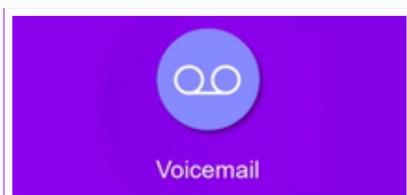
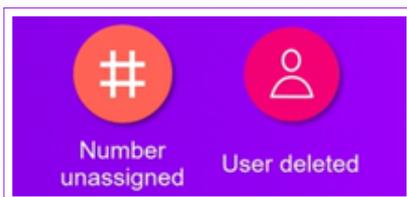
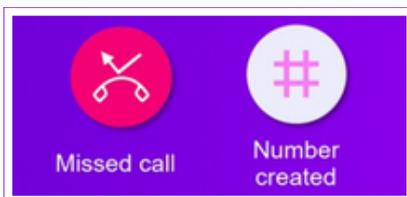
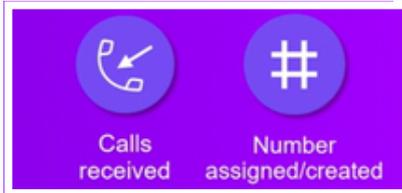
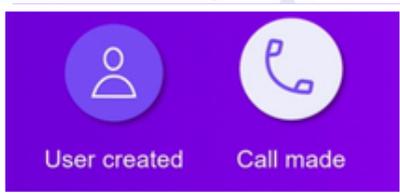
Out-of-Hours Messages allow you to handle calls differently outside of your normal business hours. Under the **Settings** cog on the left hand side when you log into Daisy PhoneLine+, **go to Calls** and you will see **Out-of-Hours**. The toggle on the right-hand side is how you **turn Out-of-Hours on and off**.

Select the day of the week for which you would like to set your **Out-of-Hours**, then **select the time** you will be unavailable to and from. For example, in the picture, the to and from times are set to 9am and 5.30pm respectively.

Under the section that says, **What Happens to a Call Out-of-Hours?** there are three options:

- **Ask to Leave a Voicemail:** here you have the option to record, upload or choose a pre-recorded voicemail.
- **Redirect to Another User:** this option allows you to redirect unanswered calls to another Daisy PhoneLine+ user.
- **Redirect to Another Number:** this option allows you to redirect unanswered calls to another number.

Dialler Screen and Activity Feed



Introduction

Your **Dialler Screen** and **Activity Feed** are the first functions you will discover when you log into Daisy PhoneLine+ on the desktop app, mobile app or on a web browser.

The Activity Feed

On the **Desktop** app and **Web Browser** versions, your **Activity Feed** is on the left-hand side panel of your **Dialler Screen**.

On **Mobile** devices, your **Activity Feed** can be accessed by **clicking the Activities button** at the bottom of your screen.

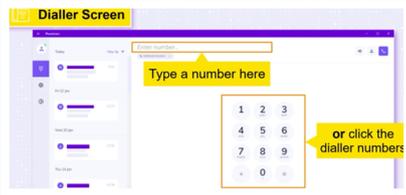
Activity Feed Icons

On the left, you can find an overview of the icons you will see on the **Dialler Screen** and what they mean.

Making and Receiving Calls

Introduction

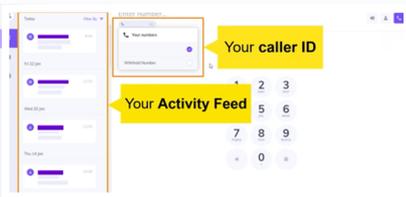
Making and receiving calls on Daisy PhoneLine+ is extremely easy. Once you have logged in you will be presented with the **Dialler Screen**. The screen is separated into sections with various features.



Making a Call

On **Desktop** the first thing you will see when you log in is the **Dialler Screen**. Either **type the number** in at the top where it says **Enter Number** or **click the dialler numbers**. Once you have entered the number, **click the handset icon** at the top right to make the call.

On the Daisy PhoneLine+ **Mobile** app, **tap the keypad**, **select the number** you want to call from, **use the keypad** to dial your contact, or **select the Search Contact icon** in the top left of your screen to search your contact list, and **tap the handset icon**.



Activity Feed

On the left-hand side you will see your recent call history and missed calls. This is called your **Activity Feed**.

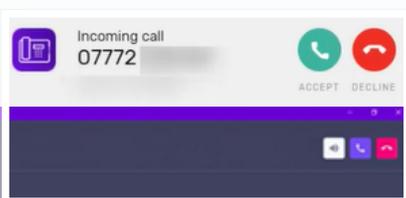
Caller ID

Select the drop-down box **Your Numbers** to **select a number** you would like to call from. This will be your **Caller ID** and will be the number the recipient sees when you call them.



Calling Your Contacts

Any contact you have saved to your Daisy PhoneLine+ account are part of your organisation and can be called directly. On **Desktop**, **click the Contacts icon** located at the top right of your screen. Search for a specific contact by **typing a name** in **Search Contacts**. **Click the suitcase icon** to search contacts who are part of your organisation. Or **click the third icon** to search the list of contacts that have been shared with you. **Click the contact's name** to view their profile, then **click the handset icon** to call your contact.



Answering Incoming Calls

On **Desktop** when you receive a call, **click the purple handset icon** to accept it. You can amend your audio input or output by **clicking the speaker icon**. **Click the red handset icon** to reject the call. If Daisy PhoneLine+ is minimised when you receive a call, **click the Accept** or **Decline call icons** on the **Pop-Up** that appears.

On **Mobile** to answer a Daisy PhoneLine+ call, **tap on the Accept** or **Decline icons** when you see the **Pop-Up** box appear. **Incoming Call** shows the **Caller's ID**. From this screen, you'll have the options to **Mute**, use the **Keypad** or put your caller on **Loud Speaker**.

Managing Your Devices

Devices

Manage all of the devices on your account.

TYPE	LAST ACTIVITY
Daniel's iPhone ios	23/6/2021 15:18
PhoneLine+ webApp	24/6/2021 12:02

Dan's iPhone Cancel Done

Device name

Use mobile data for calls?
Here you can decide whether our mobile apps should use your mobile data when making and receiving calls.

Remove this device This will remove **Dan's iPhone** from your account. You can add it back to your account later by simply logging into the PhoneLine+ app on this device.

Add a device Cancel

Device redirect
Add a number device if you want to permanently forward inbound calls to another number.

Announce calls allows you to screen a call before accepting it. Present dialled number displays the dialled number instead of the Caller's number.

Announce calls Present dialled number

Add device redirect

Add a device Cancel

Device redirect
Add a number device if you want to permanently forward inbound calls to another number.

Desk phone (SIP device)
Add a supported SIP device, such as a desk phone, to allow making and receiving calls on another device.

Please select your make and model of desk phone.

Make: Model:

If you're using another model of desk phone then please contact your Service Provider.

Introduction

Each time you log into Daisy PhoneLine+ on a new device such as a desktop or mobile phone it will appear on the **Devices** screen. When you log in, **click the cog icon** on the left and **go to Devices**. This will show you list of all devices currently linked to your Daisy PhoneLine+ account. To stop a device receiving calls **click the toggle** on the device on the right hand side.

Renaming and Removing Your Device

To rename a device to something more memorable, **click on the label** for the device you want to edit. **Type in a name** for the device and **click Done**. To remove the device, scroll to the bottom and **click Remove This Device**. To add the device again you simply need to log back into Daisy PhoneLine+ on the device.

Device Redirect

Daisy PhoneLine+ uses your internet connection to deliver outbound and inbound calls to your desktop app, web browser or mobile app. You may find it useful to add a **Number Device** and forward your calls to a landline or mobile.

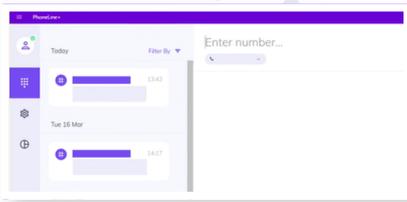
To redirect calls, **click Add a Device** on your **Devices** screen. **Add the number** you would like the calls redirected to and **click Add Device Redirect**. You can also add **Announce Calls** or **Present Dialled Number** should you wish.

- **Announced Calls** is used if you want to see your **Caller's ID** on your screen as you would with any normal device. However, when you answer the call you will hear a **Recorded Message** asking you to **press 1 to accept the call**. If you do not accept the caller will be redirected to your **Voicemail**.
- **Present Dialled Number** is used if you want to see the number the caller has dialled on your screen.

Manually Adding a Device

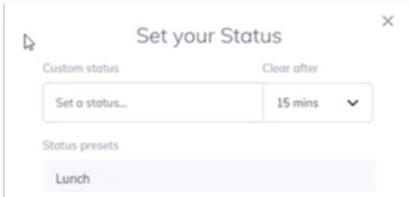
A range of compatible devices are available for Daisy PhoneLine+ including desk phones and headsets which must be purchased from Daisy as part of your Daisy PhoneLine+ order. In the **Add a Device** screen **go to Desk Phone (SIP Device)** to register your new device. **Type in the name of the model**. Finally, **type in the MAC Address**. This can be found on the back of the device. Once you have added the details, **click Add SIP Device** and restart your handset.

Setting Your User Status



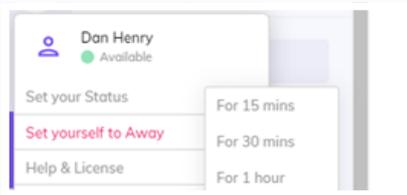
Introduction

Your **User Status** can be adjusted so that other Daisy PhoneLine+ users within your company can see if you are available to make and receive calls. **Clicking on the profile icon** in the top left shows options to set your account as **Away**, set a **Custom Status**, change your **Profile Picture** and to log out of Daisy PhoneLine+. When you log into Daisy PhoneLine+, your **User icon** will show a green circle, indicating that you are available to make and receive calls.



Setting a Customer Status

If you need to take a break or set yourself **Away**, **click on your User icon** then **click Set Your Status** and you will be shown a number of options. You can choose from the three preset statuses or type in a **Custom Status**, **select the amount of time** you will be away or select the time you will be returning and **click Save**.

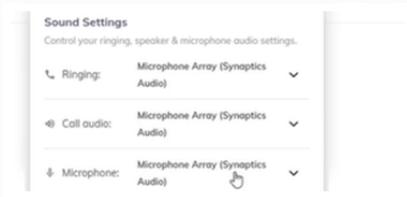
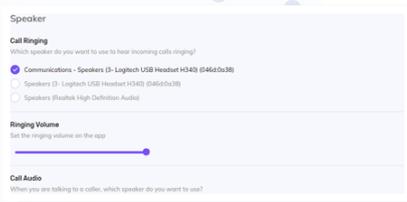


Setting Your Status to Away

Setting your status to **Away** will snooze all inbound calls during the timeframe you specify. While you are set to **Away**, Daisy PhoneLine+ will use the settings you have configured within your **Out-of-Office** settings.

To set yourself to **Away**, **click the User icon**, then **Set Yourself to Away** and choose how long you will be away for. You will notice the green icon change to the snooze icon.

Sound Settings



Introduction

Before making calls on Daisy PhoneLine+, you may want to consider your **Input and Output Settings**. Daisy PhoneLine+ allows you to select the headset and speaker via your browser or web app. You can also adjust your ringing volumes.

Finding Your Sound Settings

When you log into Daisy PhoneLine+ **select the Settings Cog** on the left hand side then **click Sound**. Under **Call Ringing** you can choose the speaker or headset (output) through which you wish to hear the notification for incoming calls. **Drag the Ringing Volume bar** left or right to choose a comfortable ringing volume.

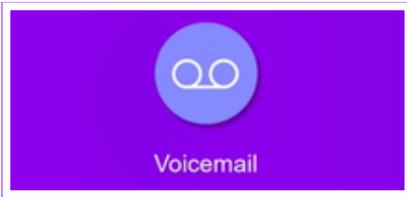
Under **Call Audio** you can choose the speaker or headset (output) through which you wish to hear the caller's voice. Under **Microphone** you can select the headset or microphone (input) which will be used to transmit your voice.

You can also change your audio settings on the **Dialler Screen** before you make a call. **Click the speaker icon** in the top right of the **Dialler Screen**. A list of connected devices will appear. **Click the drop-down arrow** next to the device name and select the device you wish to use. The speaker icon will flash when a new device has been detected.

Your Voicemail

Introduction

Daisy PhoneLine+ allows you to set up a **Voicemail Inbox** so callers can leave you a message if you are unable to take their call. You can also download your voicemail messages using the Daisy PhoneLine+ desktop app.



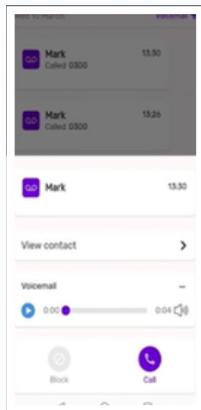
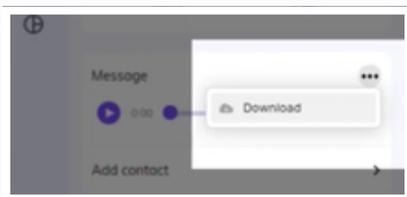
Voicemail on Desktop

On your **Activity Feed** you will see the icon on the left next to a missed call if you have been left a voicemail. **Click on the three dots**, **click Listen to Voicemail** to open a new window. The recording will play back automatically. **Use the stop/play icon** to stop/play the audio.

Click the Call button to return the missed call. To add the number to your contacts, **click Add Contact** and fill in the details. Or you can block any future calls from the number by **clicking the Block button**.

Downloading Your Voicemail Messages

To download any voicemail messages you receive, **click the three dots** to the right of the message. **Click Download**. The audio file will appear in the downloads folder on your device.



Voicemail on Mobile App

Go to your **Activities Feed** and find your voicemail message. **Tapping the Voicemail Message** will bring up a new menu. **Tap the play icon** to play the message, **tap the call icon** to return the call, **tap the block icon** to block the caller, or **tap the minus symbol** to delete the message. **Tap View Contact** to view the Caller's ID and add the caller to your contacts.



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