



daisy.

COMMUNICATIONS

| Daisy Hosted Voice

PC Soft Client User Guide



Contents

1	Introduction	3
2	Getting Started	3
	2.0.1 Minimum System Requirements	
	2.0.2 How does the client work?	
	2.0.3 Number Presentation	
	2.0.4 Installation	
	2.0.5 Signing in	
	2.0.6 Audio input/output preferences	
	2.0.7 Presence	
3	Basics	5
	3.1 Directories	
	3.2 Making a Call	
	3.3 In-call Menu	
	3.4 Drag and Drop Conference	
	3.5 Initiate a Chat	
4	Features	8
	4.1 Communicative History	
	4.2 Visual Voicemail	
	4.3 Managing the Visual Voicemail	
	4.4 Directory	
	4.5 Dial-pad	
	4.5.1 My information	
	4.5.2 Pull/retrieve call	
5	Preferences Menu	11
	5.1 General	
	5.2 Media	
	5.3 Incoming calls	
	5.4 Outgoing	
	5.5 Extensions	
	5.6 Advanced	
	5.7 Services	
	5.7.1 Sign in/out	
	5.7.2 Agent status	
	5.7.3 Unavailable codes	
	5.7.4 Log in & out of queues	

1. Introduction

The Daisy Hosted Voice clients have been designed to be used in conjunction with the core Daisy Hosted Voice service, and allow connection of either a PC or Mac desktop/laptop device, and/or connection of devices using iOS (Apple) and Android operating systems such as tablets and mobile phones.

These provide a new and exciting way of communicating with colleagues and the core Daisy Hosted Voice service, to ensure you always maximise your productivity through managing your telephony and interactions with colleagues in the most efficient way.

The clients also provide additional features as per below and explained later in this document, through an easy to use software client:

- Soft Phone
- Instant Messaging
- Presence
- Management of your existing Daisy Hosted Voice account

This document is designed at explaining the core functionality of the PC Softclient as well as the steps required to get it installed.

Please note: there is some core Daisy Hosted Voice functionality referenced in this document that is not explained in detail. Where further information is required on specific Daisy Hosted Voice features or functions please reference the Daisy Hosted Voice user guide.

2. Getting started

2.0.1 Minimum system requirements

The PC you install the softphone on must meet the minimum system specification, otherwise you may experience performance issues. The minimum spec is as follows:

Operating system:

- Windows 7, Windows 8/8.1 or Windows 10 (Classical view only)
- The installation footprint is approximately 215 megabytes (MB)
- For voice calls, a sound card, speakers, and a microphone or a headset are required
- A minimum 2 GB random access memory (RAM) is required
- Minimum 1.5 gigahertz CPU (GHz)
- Open Graphics Library (OpenGL) 1.5 or higher is recommended

Please note: The client may work on other versions of Windows or virtual environments, but are not officially supported.

2.0.2 How does the client work?

On Daisy Hosted Voice a single user account can be used for each device. This means your user account can be shared over your IP phone, your desktop client, and mobile client if applicable. In short this means that if a call is delivered to your user account, it will access all clients attached to the service, as well as your IP phone, allowing you to take the call through a device of your choice.

Likewise if you choose to adjust call settings for your user account through the client this will then be applied, meaning implementation over both your IP phone and the Daisy Hosted Voice web interface.

It is therefore key to remember that if you don't want to be contacted on the Daisy Hosted Voice client say on your desktop, but do want your IP phone to ring, that you simply log out of the client rather than implementing say Do Not Disturb [DND].

Finally, where the intention is to login to a single account with multiple devices of the same type at the same time (i.e. laptop and desktop using the desktop client, or mobile phone and tablet using the mobile client) calls will be delivered randomly to any of the logged-in devices. It is recommended that, where the intention is to use multiple devices, users must logout of each device when moving between them, so that only one device of each client type is logged-in at any one time.

2.0.3 Number Presentation

Number presentation within the Daisy Hosted Voice clients mimics that set in the Daisy Hosted Voice system. As such if a user generates a call from the Daisy Hosted Voice client, this will output the number presentation assigned to the users Daisy Hosted Voice account.

An option to hide the number for outbound calls is available within the settings.

2.0.4 Installation

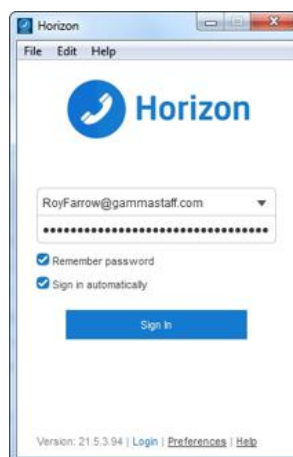
Your Administrator will provide you with the installer in the form of a .exe file. They may opt to install this on your behalf if administration permissions are enforced on your PC. To install;

- Double-click the installer executable and follow the installation instructions
- Launch Daisy Hosted Voice Soft Client Application

2.0.5 Signing in

When you first sign in you will be prompted to sign in - please note these are different than the Portal login details. Please speak to your Administrator if you don't have your log in details.

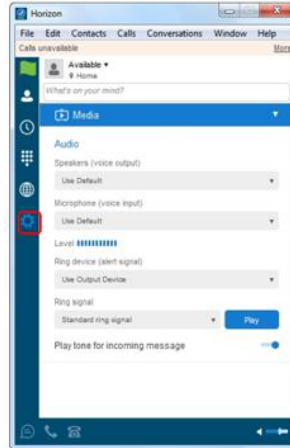
If required you can request the softphone to remember the password and sign you in automatically.



2.0.6 Audio input/output preferences

In order to use the PC softphone you'll need a microphone and speakers - these could be built in, or could be in the form of a USB headset. After you first install the softphone you'll want to ensure these settings are correct.

To do this select Preferences and Media from the dropdown menu. Then ensure the Audio Speakers, Microphone and Ring device options are set to your desired choice.



3. Basics

The main sections to the app can be seen down the left hand side and along the bottom of the main screen. Each of their functions are described below;



My Information - view & update your information, i.e your presence, avatar and location



Contacts - view your contacts



Communications History - view previous chats & calls



Full Enterprise Directory - show all contacts in the directory



Dial Pad - make calls. Integrated within the main window



Chat - start an instant message conversation with a selected contact



Call - make an IP audio call to a selected contact



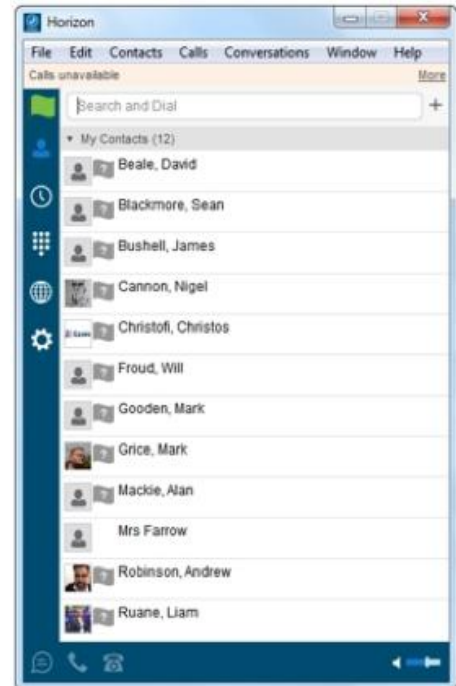
Call from Phone - make a click-to-Dial call from your desk phone (or secondary device)



Call Settings Menu - use for quick access to call settings such as call forwarding

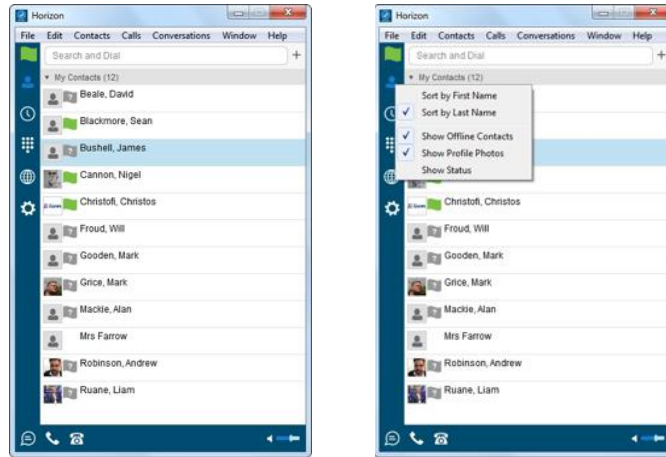


Add - add a contact, group or conference



When you start the soft client for the first time, your Contacts list will be empty. The easiest way to add a contact is to click on the directory icon, right click the user you'd like to add and select 'Add contact'. They will be sent a request to share presence with you, once accepted you can see each other's presence and instant message between each other.

Right clicking on the contacts icon allows a user to arrange the order.



3.1 Directories

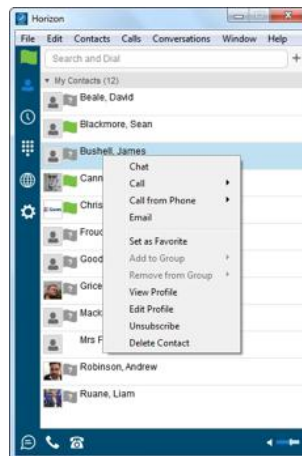
Contacts stored in the Enterprise Directory (internal), Company Directory (external) and Personal Directory can all be searched using the Contacts tab.

The directory tab will only display contacts from the internal enterprise directory.

3.2 Making a call

To make a call to one of your contacts you can either;

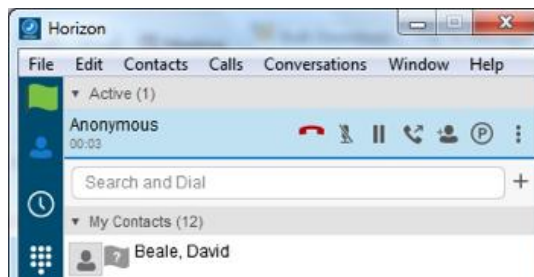
- Right click and select if you'd like to call from your softphone or desk phone Highlight the relevant contact and click the icon depending on the type of call you'd like to make (as detailed in 'Basics')



3.3 In-call Menu

Once the call has started the in-call menu will appear at the top of the window. From here you can:

- Hang Up
- Mute
- Hold
- Transfer
- Conference
- Call Park



3.4 Drag and Drop Conference

Right clicking on an active call brings up further options (pictured right).

Furthermore, an active call can be dragged and dropped onto a 2nd call to create a conference.



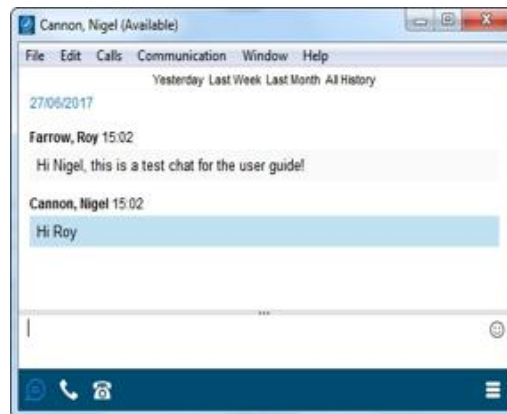
3.5 Initiate a chat

To initiate a chat with one of your contacts you can either;

- Right click and click 'Chat' or
- Highlight the relevant contact and click the 'Chat' icon (as detailed in 'Basics')

If you'd like to initiate a call to your contact you can do so by clicking one of the call icons from the bottom of the chat window.

At the top of the message area, there are four links: Yesterday, Last week, Last month, and All history. From these links, you can load history from your local storage and different time frames. You can delete the history using the drop-down menu.



4. Features

4.1 Communication History

The communication history section will show all of your incoming, outgoing and missed calls, as well as your chats and voicemail. You can initiate calls or chats from this page by selecting the appropriate icon from the bottom of the softphone or right clicking and selecting the relevant option.

The window has 3 main tabs:



Incoming and outgoing call history



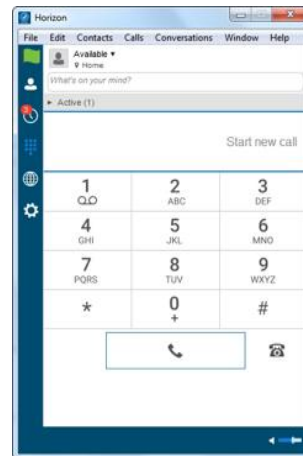
Chat history



Voicemail history



Any missed communications will be represented by a number being displayed next to the main Communication History icon () on the left hand side bar.



Clicking on the Communication History will reveal what the missed communication was, in this case it was Voicemail notification.



4.2 Visual Voicemail

The Voicemail icon at the top of the tab will tell you how many are unplayed. Voicemails are accessed by selecting the tab.

NB Listening to voicemail on the Client uses data instead of calling into the voice portal, so internet access would be required to retrieve and play back the voicemail.



4.3 Managing the Visual Voicemail

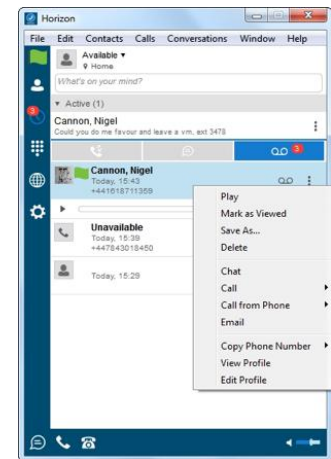
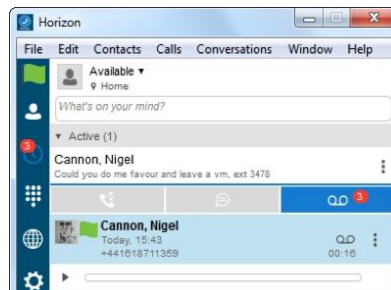
You play back the voicemail by selecting and highlighting the voicemail and then clicking on the play icon.

You can also right click on the highlighted voicemail or select the icon to display the Voicemail management actions where you can:

- Play
- Mark as Viewed
- Save as
- Delete

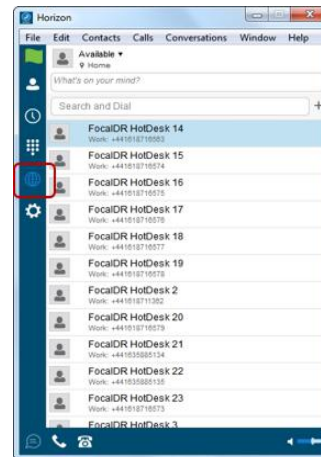
Additionally you can initiate a Call or Chat to the person or send them an email. The return communication options will vary depending on the level of detail Daisy Hosted Voice has within the Daisy Hosted Voice directory.

You also have the option to Copy the number, add to or edit a contact profile from the menu.



4.4 Directory

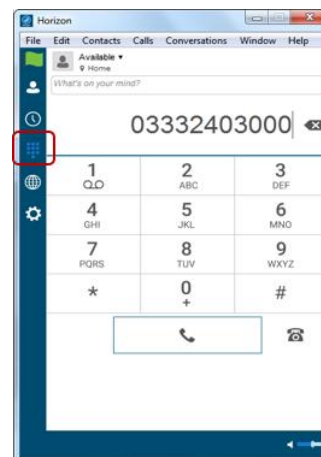
The directory tab will load all users in your company directory. You can use the white bar along the top to search/filter your results. After you locate the relevant person from the directory you can add them as a contact, initiate a chat (subject to being added and accepted as a Contact) or make a call from your softphone/desk phone. These options are available by right clicking on the mouse.



4.5 Dial-pad

Clicking the dial pad will present the screen to the right. You can input a number by either clicking the numbers with your mouse or entering them with your keyboard. You can then select whether the call is made from your softphone or your desk phone.

Clicking the handset before entering a number will enter the previously dialled number.



4.5.1 My information

Clicking on the flag will allow you to update your own information. Areas to be edited include;

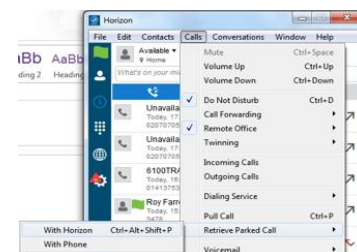
- Status - by clicking the next to your current status
- Location - by clicking set location
- Profile picture - by right clicking the image section. You can either clear your current picture or add a new one



4.5.2 Pull/retrieve call

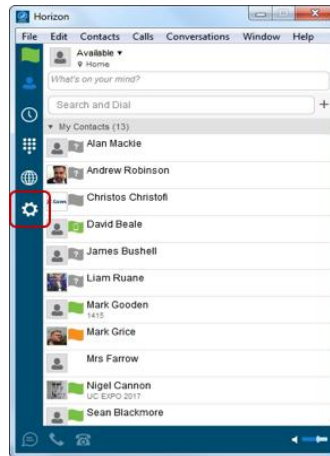
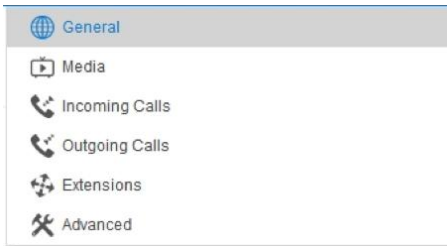
These options allow you to;

- Pull call. This is where a user can over a live call from another device, i.e. their desk phone
- Retrieve call. User would dial the location then # to retrieve the call



5. Preferences Menu

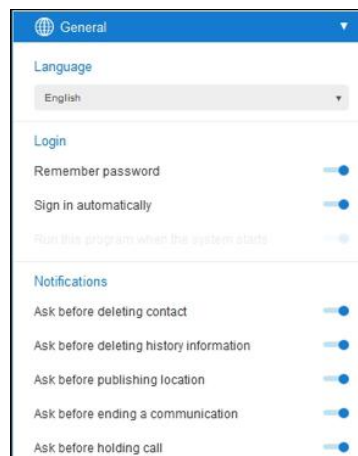
The Preferences menu can be located as indicated in the image to the right. Within here you can access the following topics and settings menus.



5.1 General

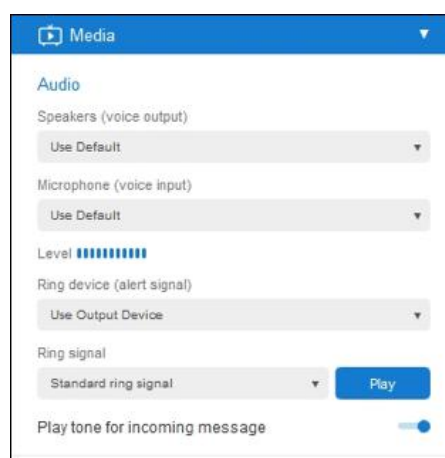
Allows you to define some characteristics of the softphone, such as whether it starts automatically when Windows does. Some of the other common fields are;

- Sign in automatically - whether you'd like the softphone to sign you in as soon as it starts
- Run the programme when the system starts - if you'd like the softphone to start when Windows starts
- Enable / disable certain notifications



5.2 Media

Here you can specify the devices you'd like to use as your speakers and microphone.



5.3 Incoming Calls

Do Not Disturb will stop calls arriving at your phone. This allows you to enable/disable this feature as required.

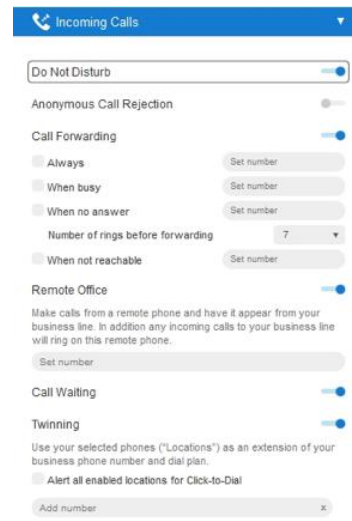
Enable/Disable the rejection of any calls from a caller where their ID is anonymous or withheld.

Here you can enable/disable any Call Forwarding for the four scenarios detailed and maintain the divert numbers as required.

Remote Office direct calls coming into a user's Daisy Hosted Voice number to a remote specific phone. You can also maintain the number being used for remote office.

Enable/Disable the call waiting feature.

Twining allows you to specify one or more numbers that will ring any time you receive an incoming call to your Daisy Hosted Voice extension. You can activate these individually, or all at once, as required.

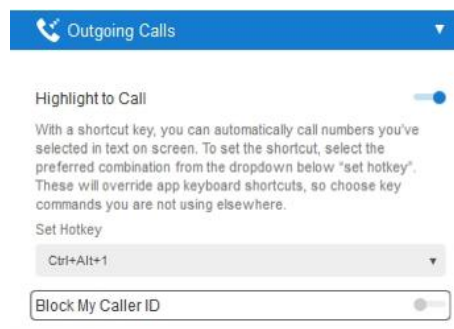


5.4 Outgoing Calls

Highlight to Call feature allows you to highlight a number on any of your applications and press a hot key to call the number.

It's advised that you select a hot key combination that is not already being used by another application.

Enable / Disable the sending of your call ID on an outgoing call.

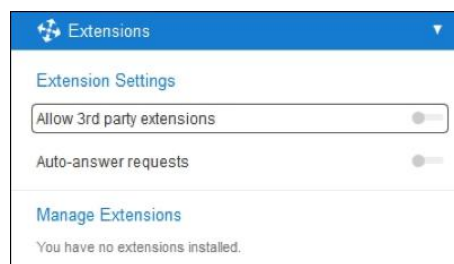


5.5 Extensions

This enables enhanced connectivity between a 3rd party extension, for example a headset, and can facilitate call answering and volume control directly via the headset. These extensions sit outside the scope of support and therefore if a 3rd party extension does not work Daisy cannot guarantee to resolve the issue.

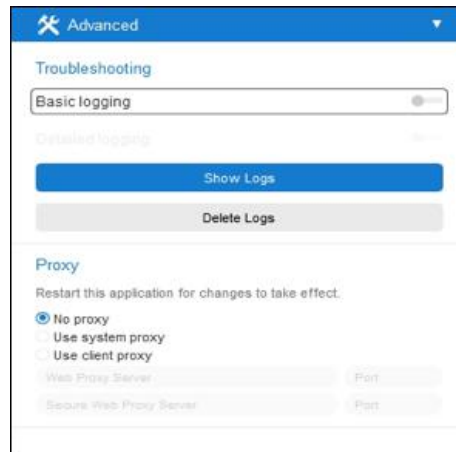
You can also choose default behaviour to always reject or accept requests from third-party applications and allow or reject individual third-party applications.

The default position of the Extension Settings options will be always be disabled.



5.6 Advanced

This section allows for Basic and Detailed logging to be enable and disabled for the purpose of troubleshooting and support.



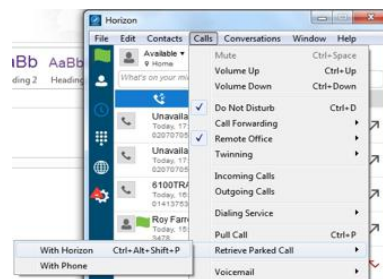
5.7 Services

NB Only appears if user is assigned as an agent to a relevant Call Centre or Group.

The PC Client can be used with Call Queue Groups and Call Centre on Daisy Hosted Voice (the corresponding agent licence is required for each). The queues menu can be accessed from the settings options at the bottom right of the client. Once selected the following options are available for an agent:

5.7.1 Sign In/Out

- Sign-In: Agent can sign in to the call centre
- Sign-Out: Sign out of the call centre



5.7.2 Agent Status

An agent can also change their status

- Available - Calls will be routed to the agent
- Wrap Up - Calls will not be routed to the agent for a period of time set by the administrator. Once this time has expired, the agent will change to available
- Unavailable - Calls will not be routed to the Agent

5.7.3 Unavailable Codes

In the example above right, the administrator has switched unavailable codes on and pre-set some options. When the agent selects unavailable, they will now have to choose a reason for the change.

5.7.4 Log in & Out of Queues

If the administrator has set “Allow Agents to Join Call Centres” in the Daisy Hosted Voice GUI, then the PC Client can be used by the agent to select which call centres/queues groups they want to join.



To find out more about **DHV PC Soft Client**, please contact us today:

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