

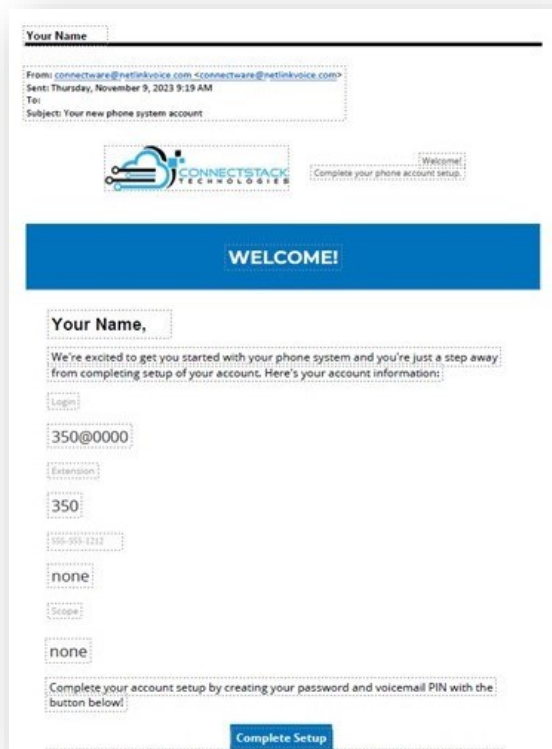


ConnectWare Softphone User Guide



Welcome to your ConnectWare Softphone

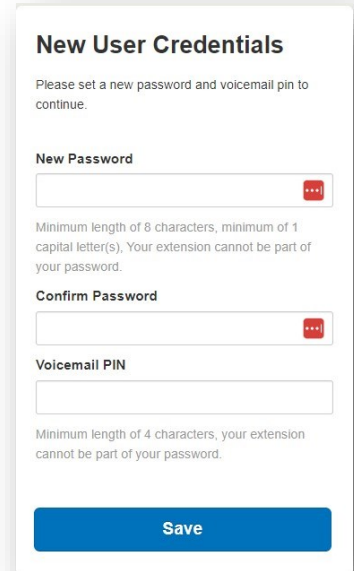
CONNECTmobile Web is a browser-based softphone built for Phonesuite's ConnectWare platform. One of the many benefits of CONNECTmobile Web is its simplicity. Designed to replicate the features of a traditional desk phone, you will find it simple to place calls and manage settings with our intuitive user interface design. CONNECTmobile Web can be accessed by navigating to a unique URL in a browser and logging in or by launching the pop-up from the portal. It does not require any additional software installations or configurations. All you have to do is launch the application, click a button to grant it permission, log in, and start dialing. After initial setup, you can begin to make calls using the app in your browser.



Let's Get Started!

Once your phone system administrator has created your account, you will receive a welcome email to help you set up your softphone account. Once you receive this email, it is important to open it and click on the 'Complete Setup' link as you will have 24 hours from the time the email was sent to complete your account setup before the link expires.

Upon clicking the “Complete Setup” link in the welcome email you will be presented with a “New User Credentials” screen. This is where you will set up a new password and assign a Voicemail PIN unique to your account. Once you’ve entered this information, click the “Save” button.



New User Credentials

Please set a new password and voicemail pin to continue.

New Password

Minimum length of 8 characters, minimum of 1 capital letter(s). Your extension cannot be part of your password.

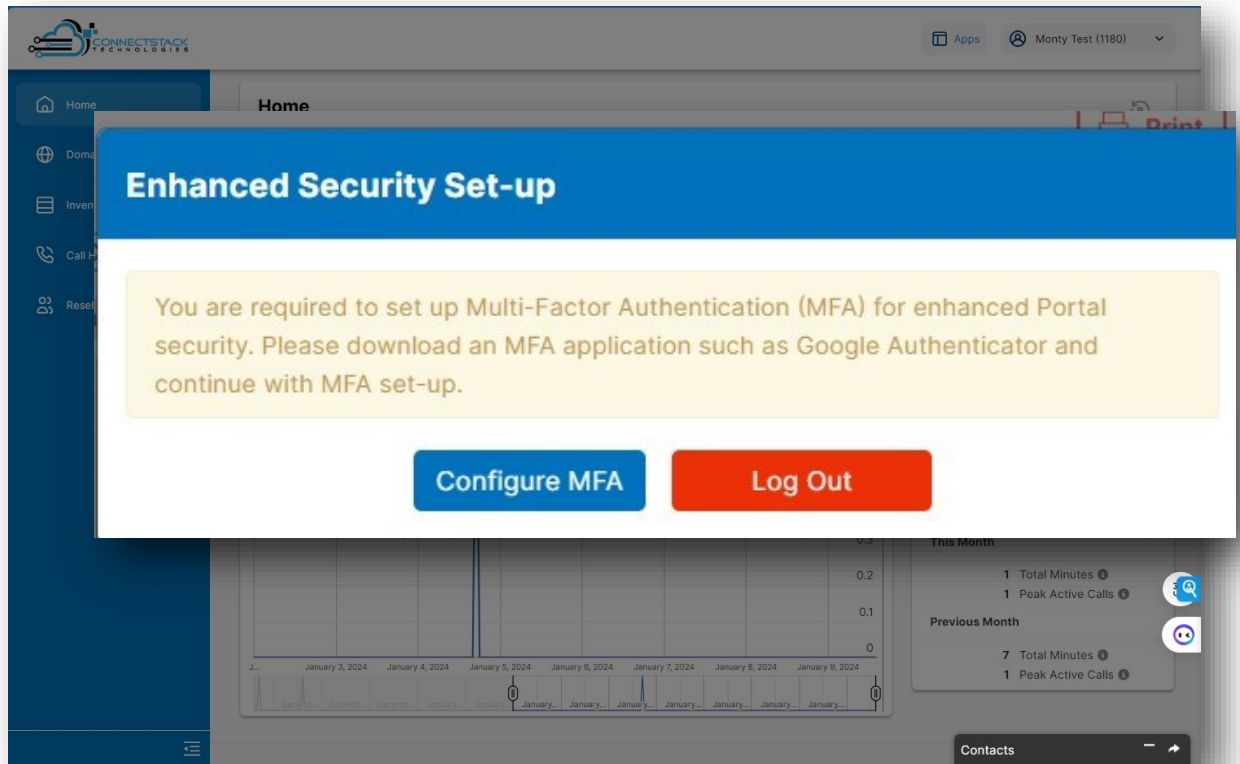
Confirm Password

Voicemail PIN

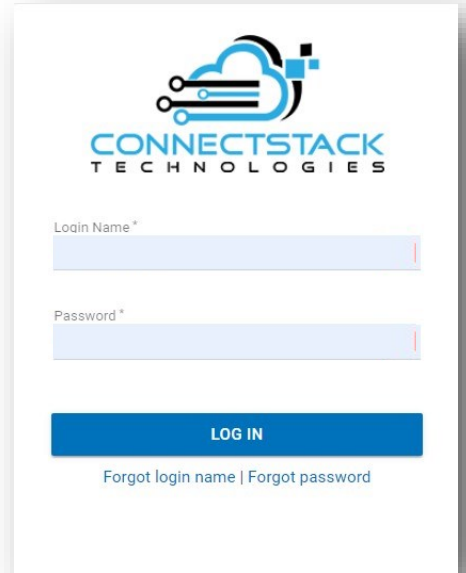
Minimum length of 4 characters, your extension cannot be part of your password.

Save

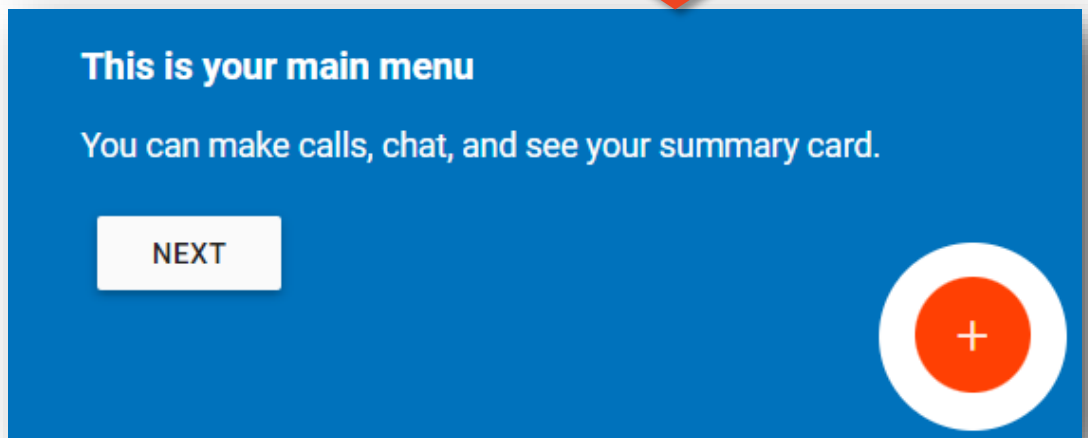
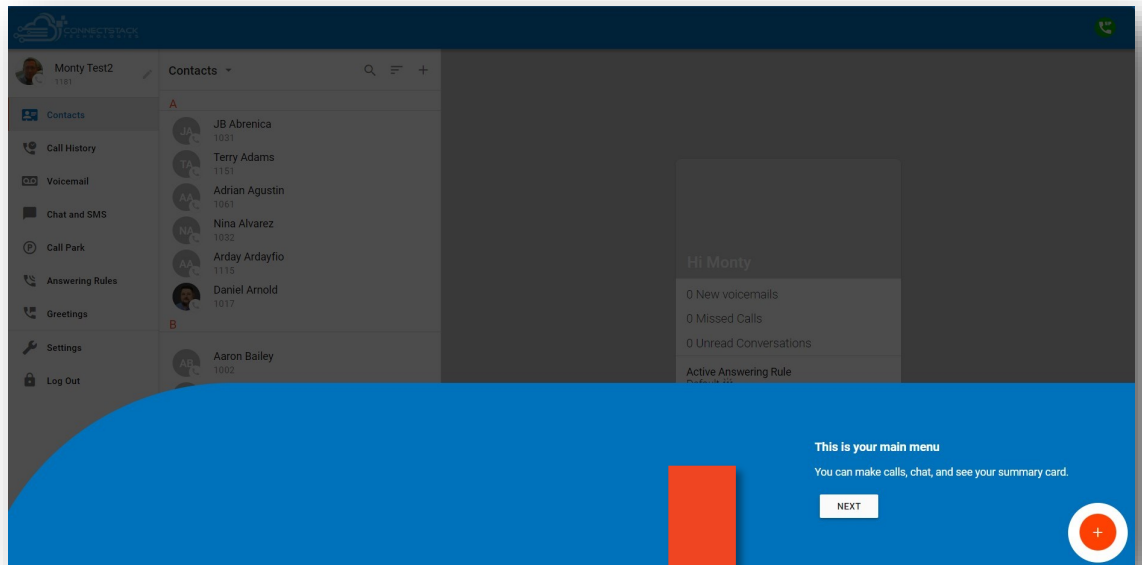
You’re almost logged in!, But first, you’ll be required to configure MFA (Multi-Factor Authentication) for Enhanced Security Setup. You are required to set up Multi-Factor Authentication (MFA) for enhanced Portal security. Please download an MFA application such as Google Authenticator and continue with MFA set-up.



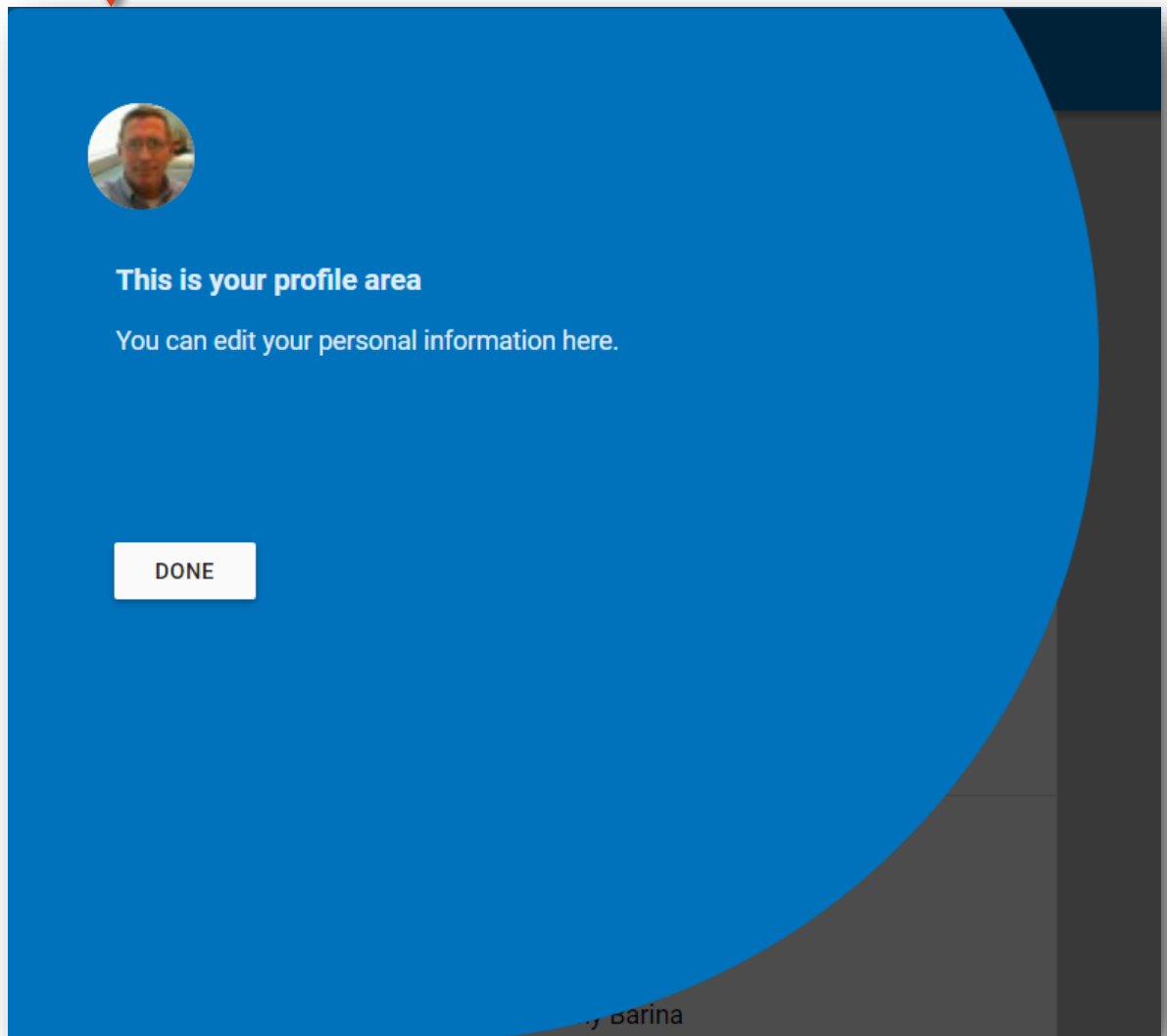
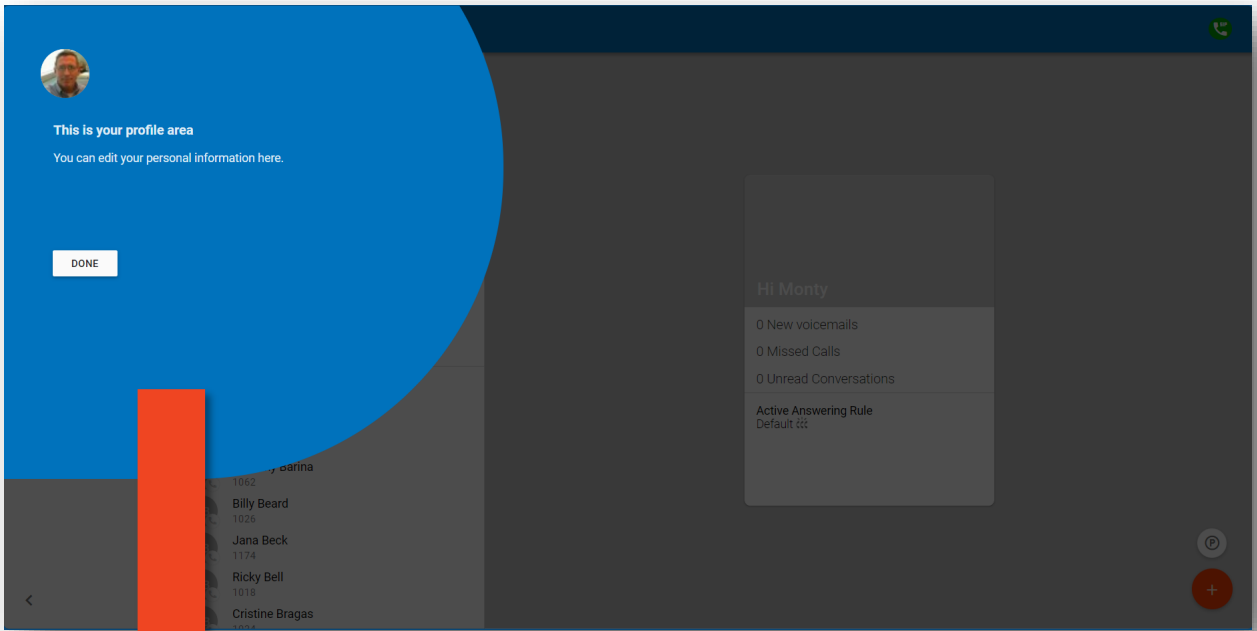
Now that your account is set up,, you can bookmark the CONNECTmobile Web URL. You should be logged in yet, but if not, open your bookmark, you'll be presented with the login screen and asked for your MFA code.



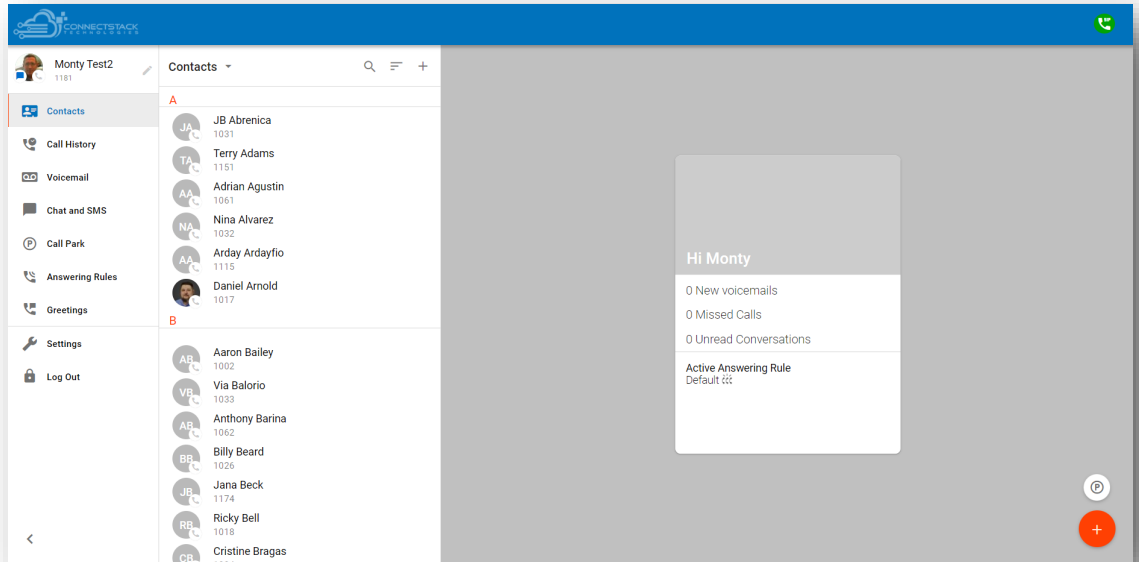
The first time you login, you'll have a few welcome screens to help you around.



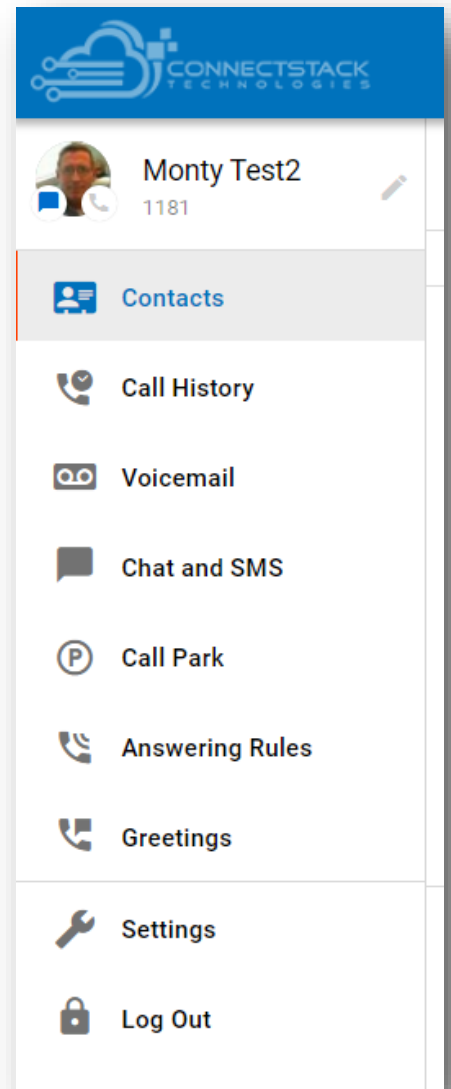
ConnectWare Softphone User Guide



Once you've clicked through the welcome login screens you'll see all the features of your new softphone.



The left-side area of your screen presents you with several sub-menu options:. We'll go through each of these.



Main Screen

The main screen shows when you first log in (Figure 1). You will see all the available menus to the left side of the screen, a listing of contacts, a listing of current chats, and it will give you a summary of Voicemails, Missed Calls, Unread Conversations (Chat and SMS screen) see Figure 1. Also, you can place a phone call, or start a new Chat conversation with system users, using the red "+" icon, Figure 3a, 3b.

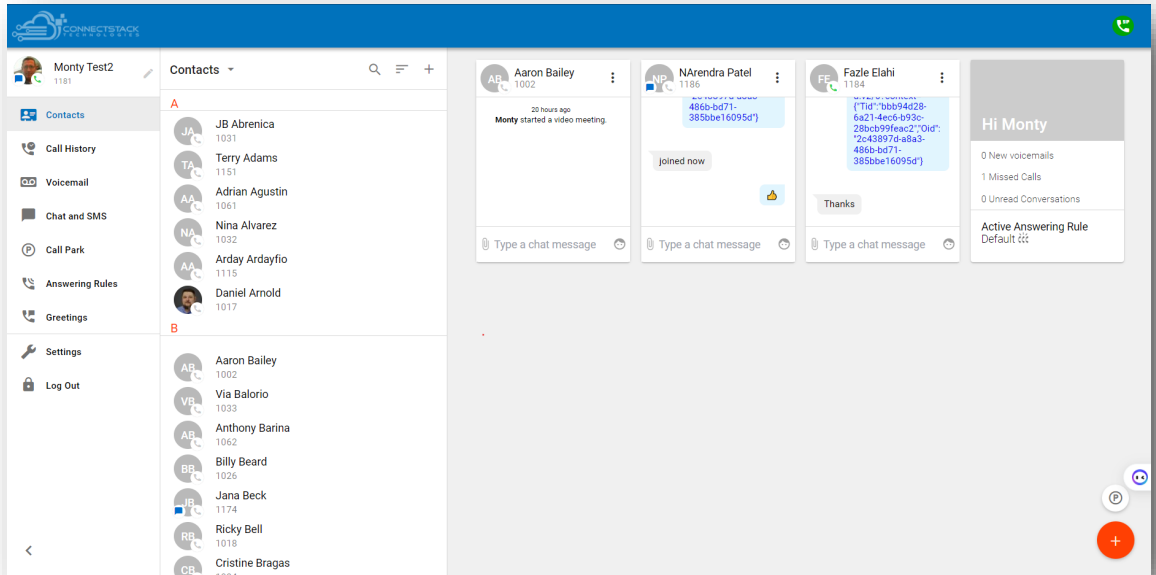


Figure 1

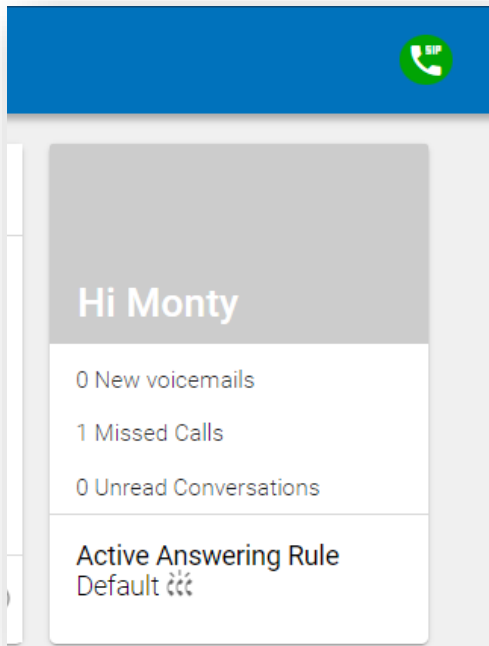


Figure 2

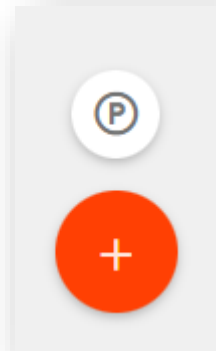


Figure 3a

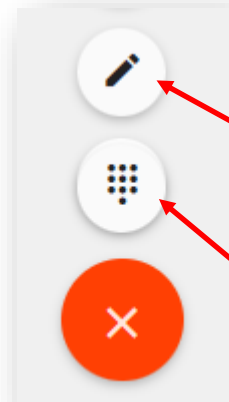
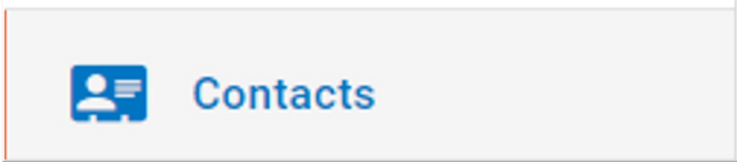


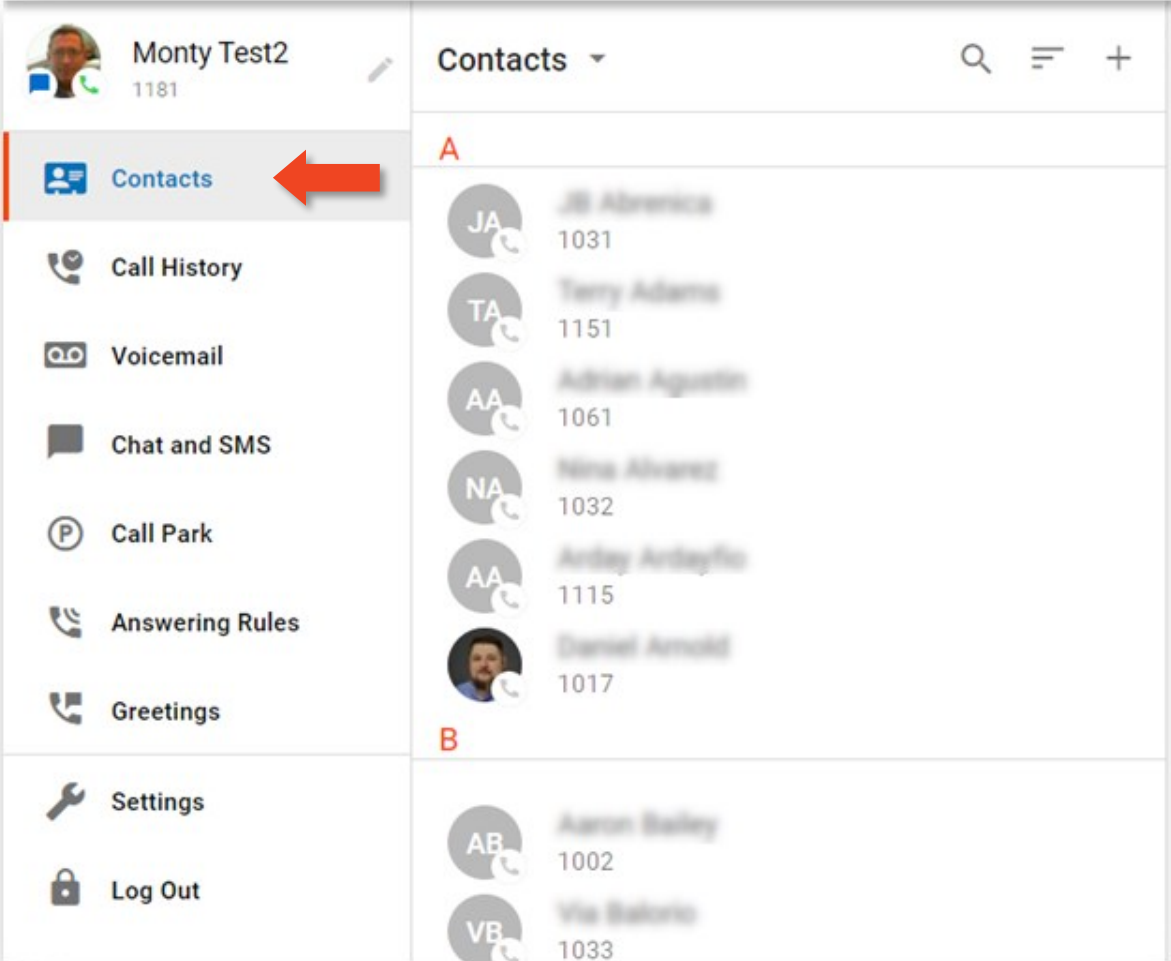
Figure 3b

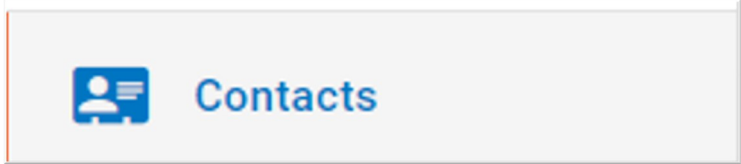
Initiate New Chat

Initiate New Phone Call

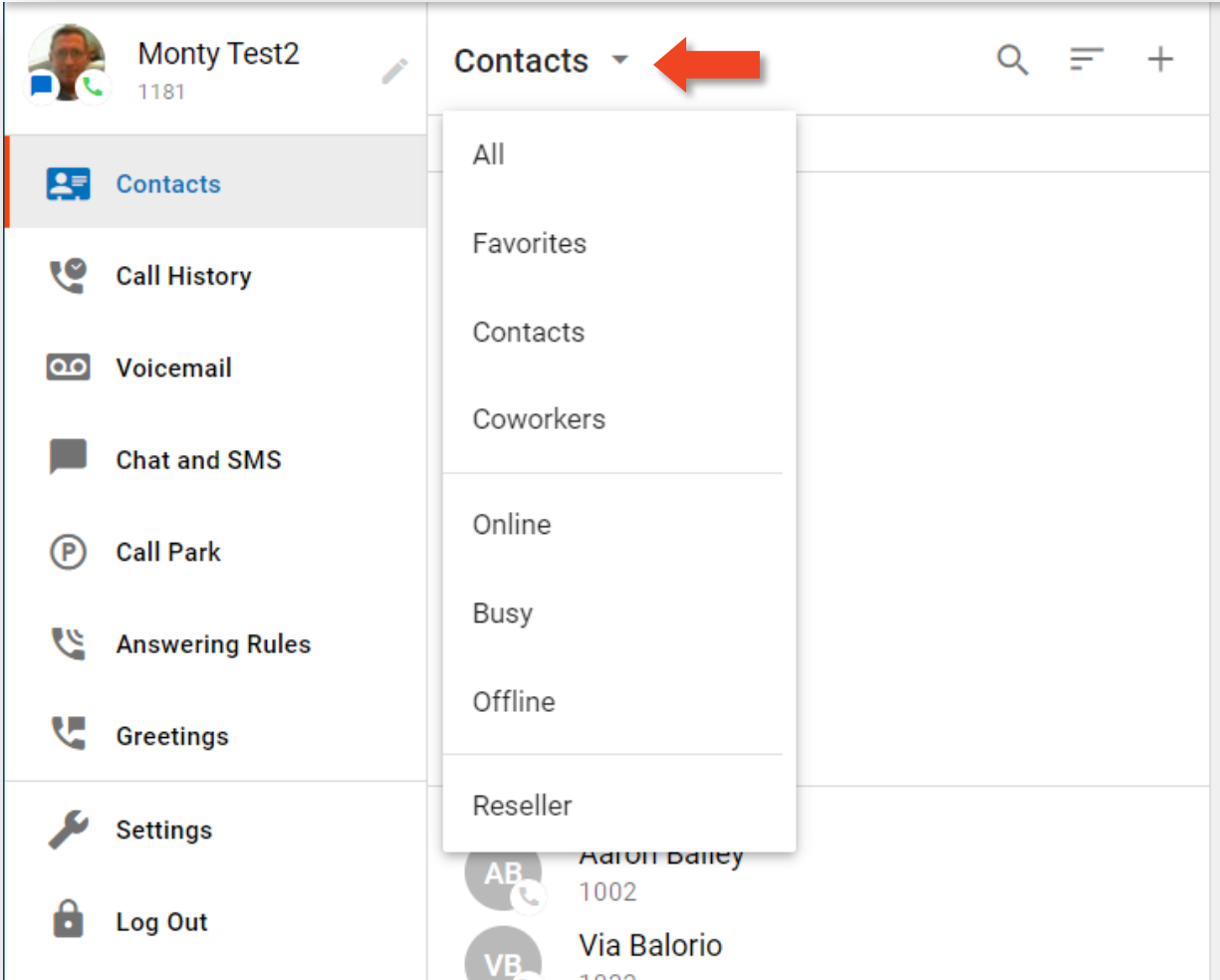


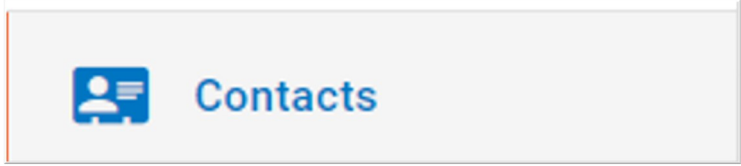
Will bring up any pre-loaded contacts for you. You can click on the contacts tab to see more options:





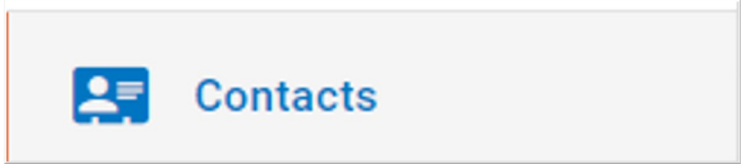
You can change your Contacts view by clicking on the down arrow.



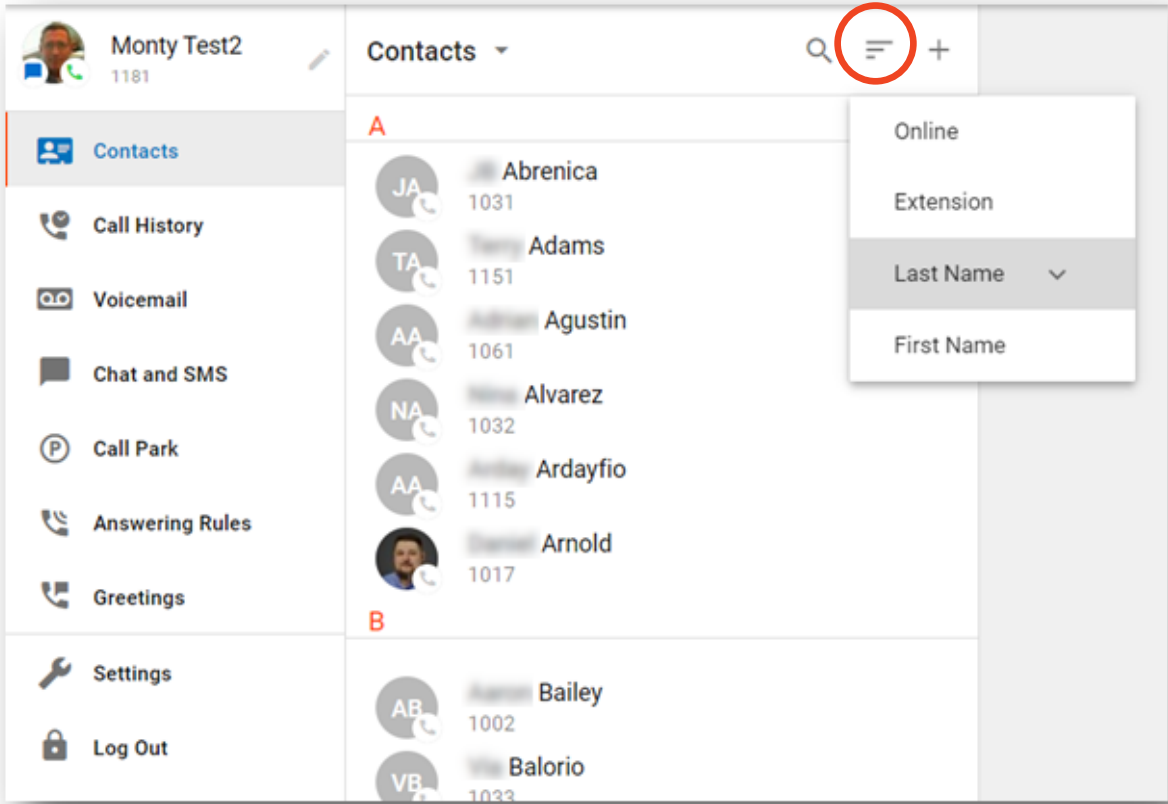
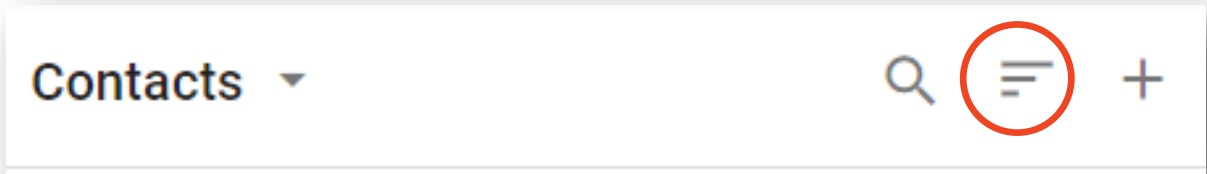


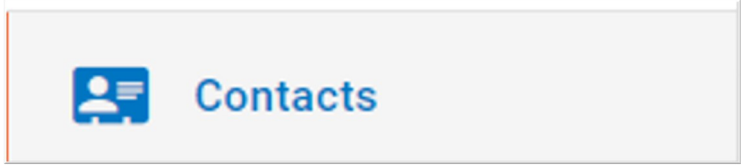
Search Contacts by clicking on the magnifying glass and enter first name, last name, or extension

The screenshot shows the 'Contacts' section of the softphone interface. At the top, there is a header bar with the word 'Contacts' on the left, a magnifying glass icon in the center (circled in red), and a plus sign on the right. Below the header, the main area is split into two columns. The left column is a navigation menu with the following items: 'Contacts' (highlighted with a red bar), 'Call History', 'Voicemail', 'Chat and SMS', 'Call Park', 'Answering Rules', 'Greetings', 'Settings', and 'Log Out'. The right column shows a search results area with a search bar containing the text 'lambie'. Below the search bar, a single contact is listed: 'Monty Lambie' with the extension '1003' and a profile picture.

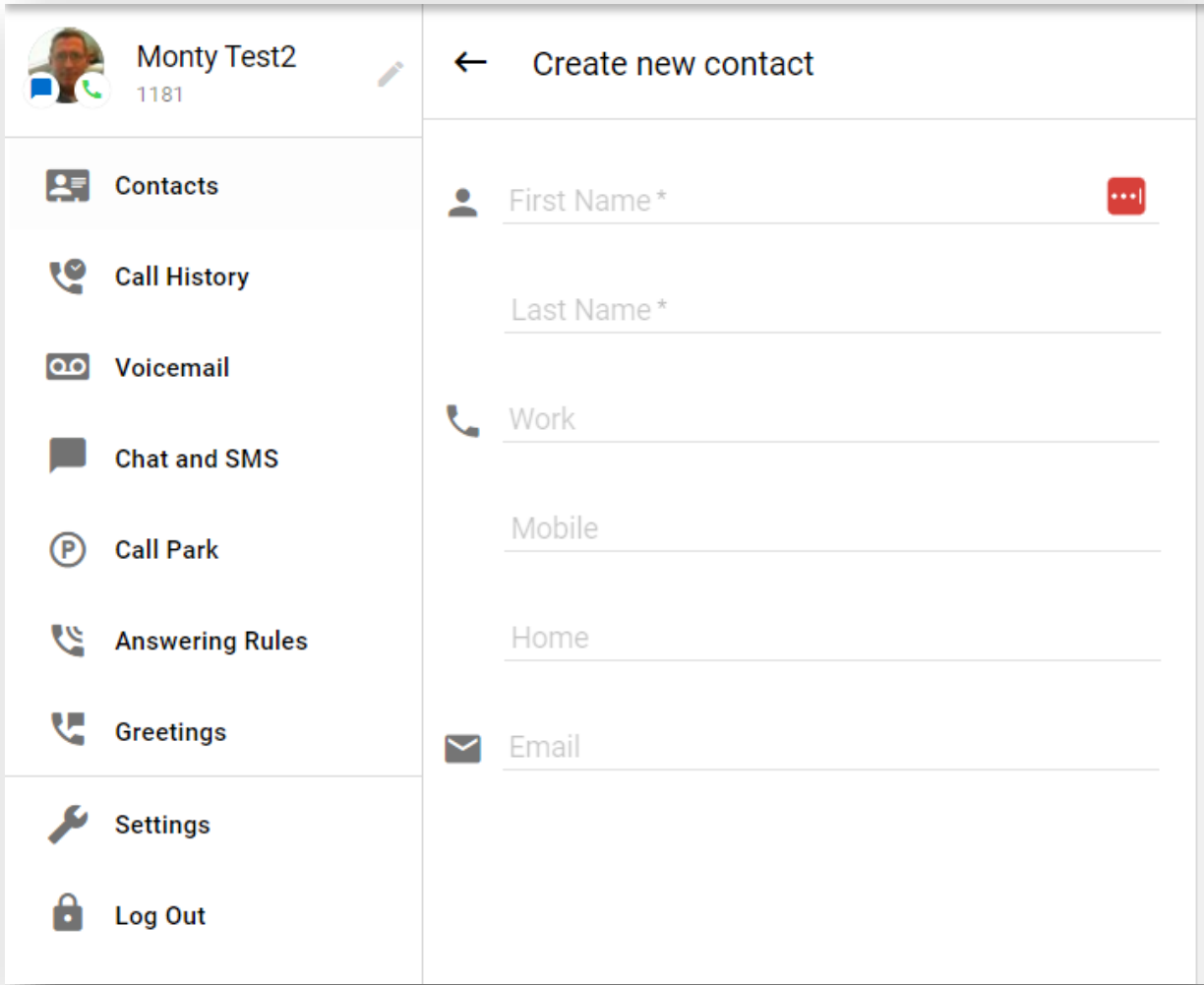
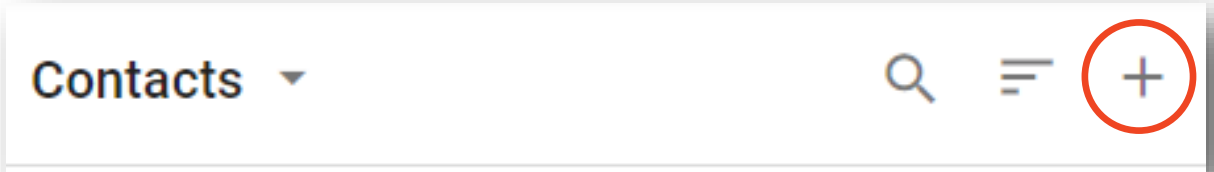


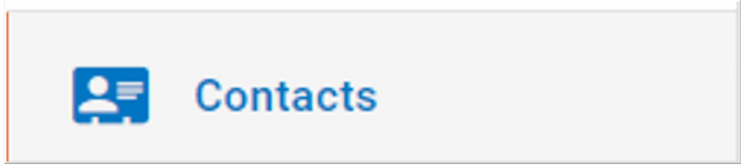
Click on the Sort Icon to sort by Online, Extension, Last Name, or First Name



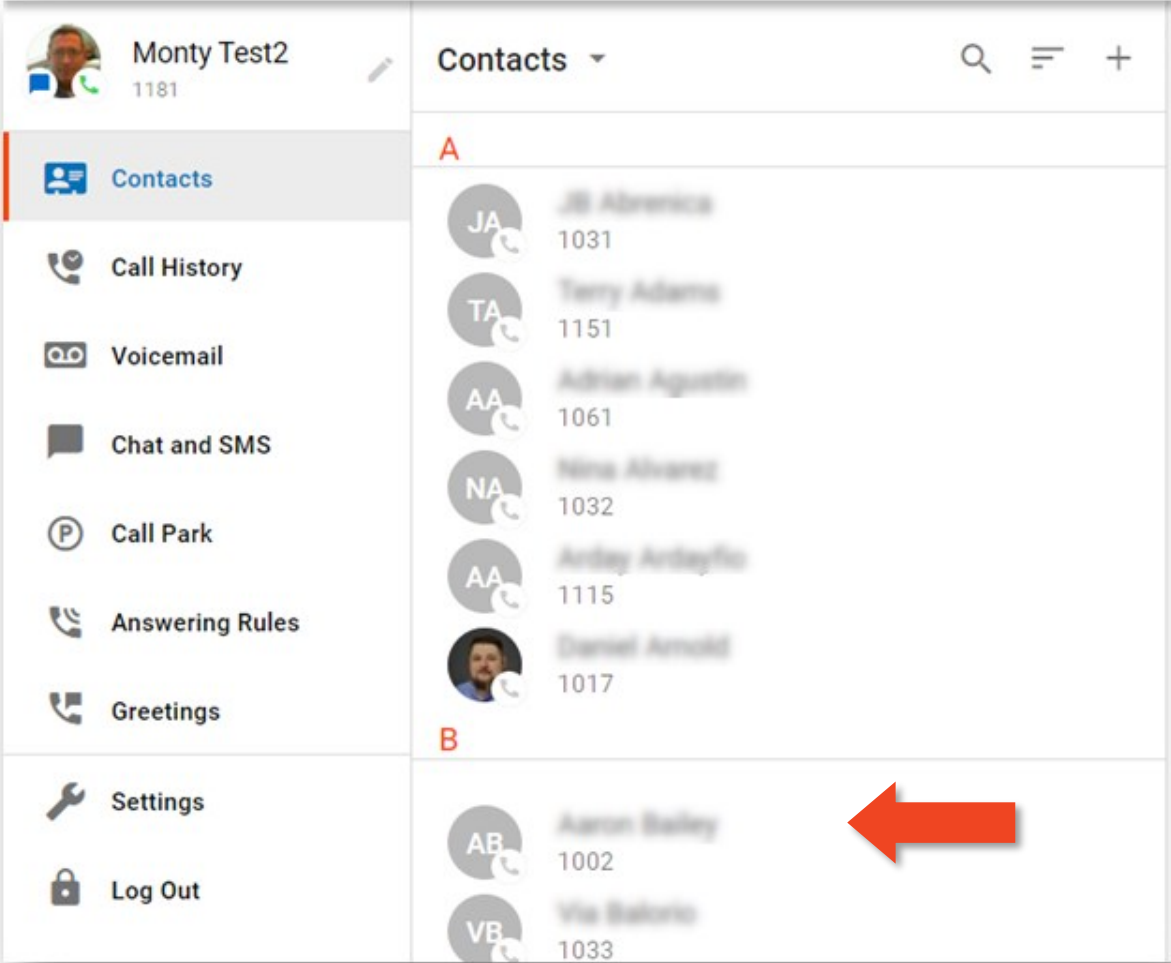


Click on the + Icon to create a new contact

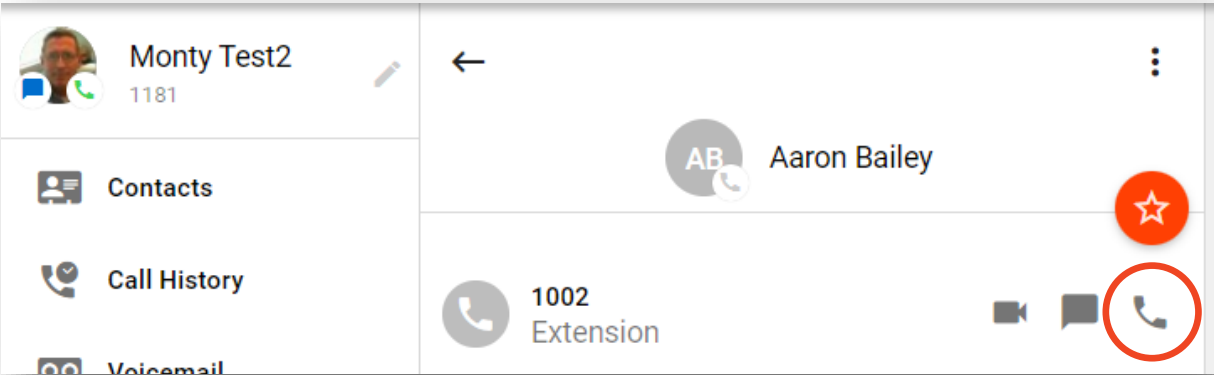




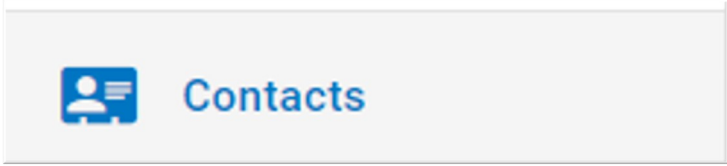
To place a call to a contact just click on the person you'd like to call



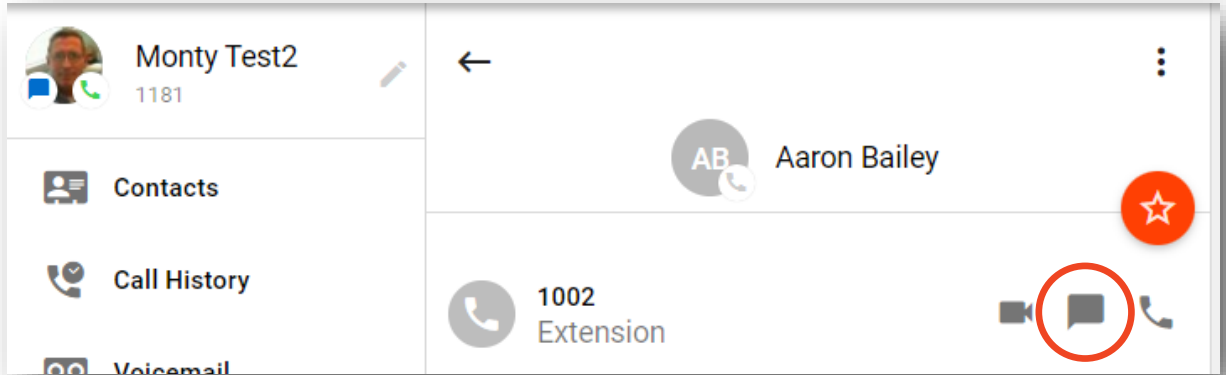
Then click on the number for the contact and click on the phone icon. You can also chat with this person, start a new meeting, start screen sharing, or schedule a meeting with this person.



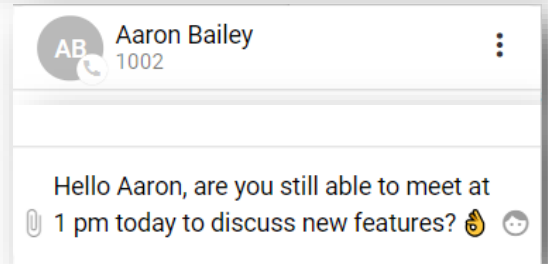
TIP: Click on the Red Star Icon to add this contact to your Favorites list.



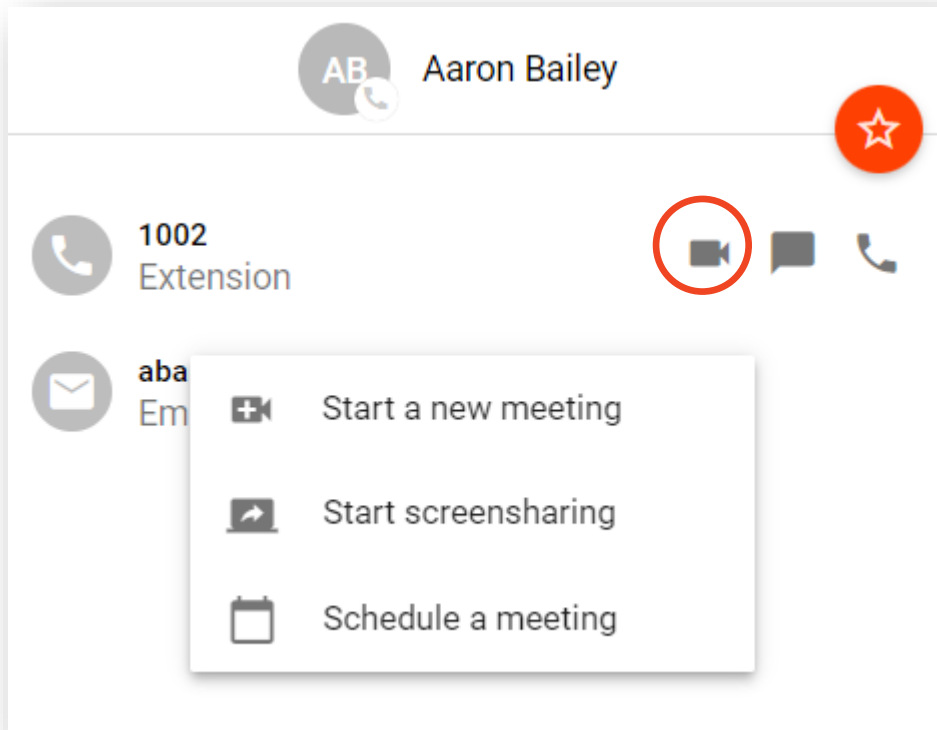
To chat with this contact, click on the chat icon.



This will bring up a Chat dialog box.



To Start a new meeting, start screensharing, or Schedule a meeting, click on the camera icon.











Call History

The Call History Tab will list all calls—incoming and outbound.

The screenshot shows the ConnectWare Softphone interface. On the left is a vertical sidebar with a list of navigation options: **Monty Test2** (1181), **Contacts**, **Call History** (highlighted with a red bar), **Voicemail**, **Chat and SMS**, **Call Park**, **Answering Rules**, **Greetings**, **Settings**, and **Log Out**. The main content area is titled **Call History** and contains a large circular icon of a telephone handset and the text: "You have not made or received any call".

 VOICEMAIL


The Voicemail tab show how many voicemails you have and will list all voicemails and you can play the voicemail, call the contact back, save the voicemail, forward to another user, and delete. Your voicemail will have text transcription and will also be emailed to your email





 <p>Monty Lambie 322</p>	<p>VOICEMAIL ▾</p>
<p> CALL_CENTER</p>	<p>WIRELESS CALLER 4 days ago Monkey. This is Steve Watkins. Give me a call when you get a chance. 5 0 5 2 5 0 8 5 3 5. Thanks. 00:54 ▶</p>
<p> CONTACTS</p>	<p>WIRELESS CALLER 5 days ago Monty. Just when you give me a call ... 00:04 ▶</p>
<p> CALL_HISTORY</p>	<p>DAVID SERO 6 days ago Monty. We have Sarah with H&M BL... 00:14 ▶</p>
<p> VOICEMAIL 21</p>	

VOICEMAIL ▾

WIRELESS CALLER 4 days ago

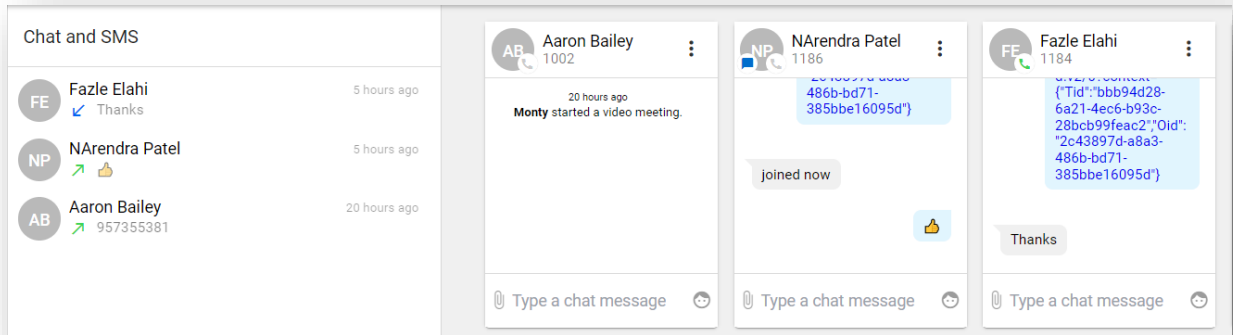
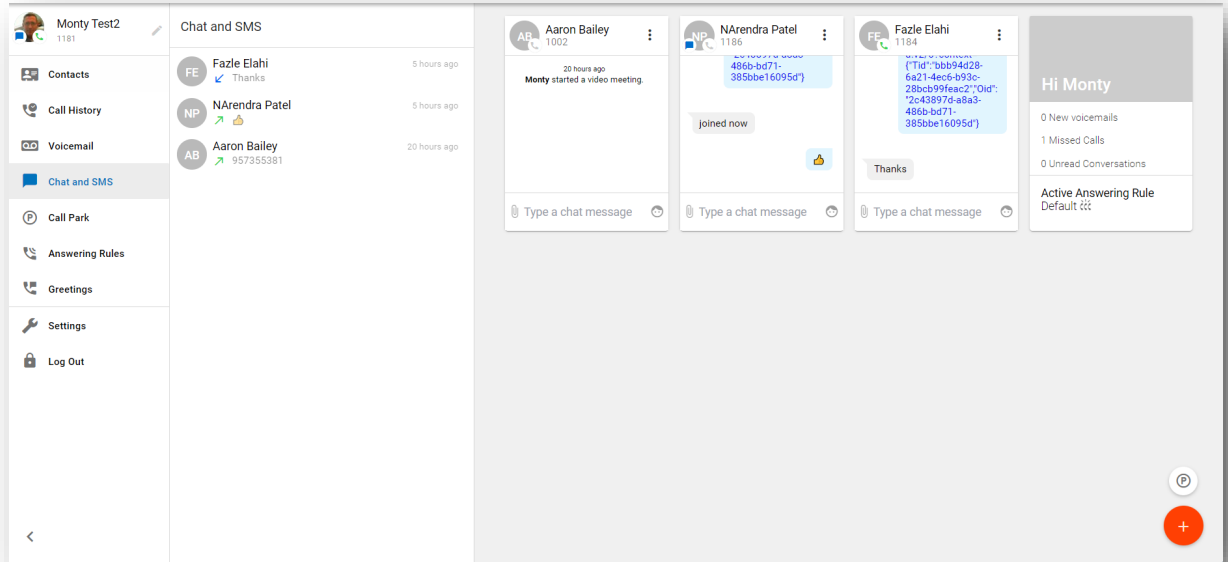
Monkey. This is Steve Watkins. Give me a call when you get a chance. 5 0 5 2 5 0 8 5 3 5. Thanks.

▶ 00:00  00:54

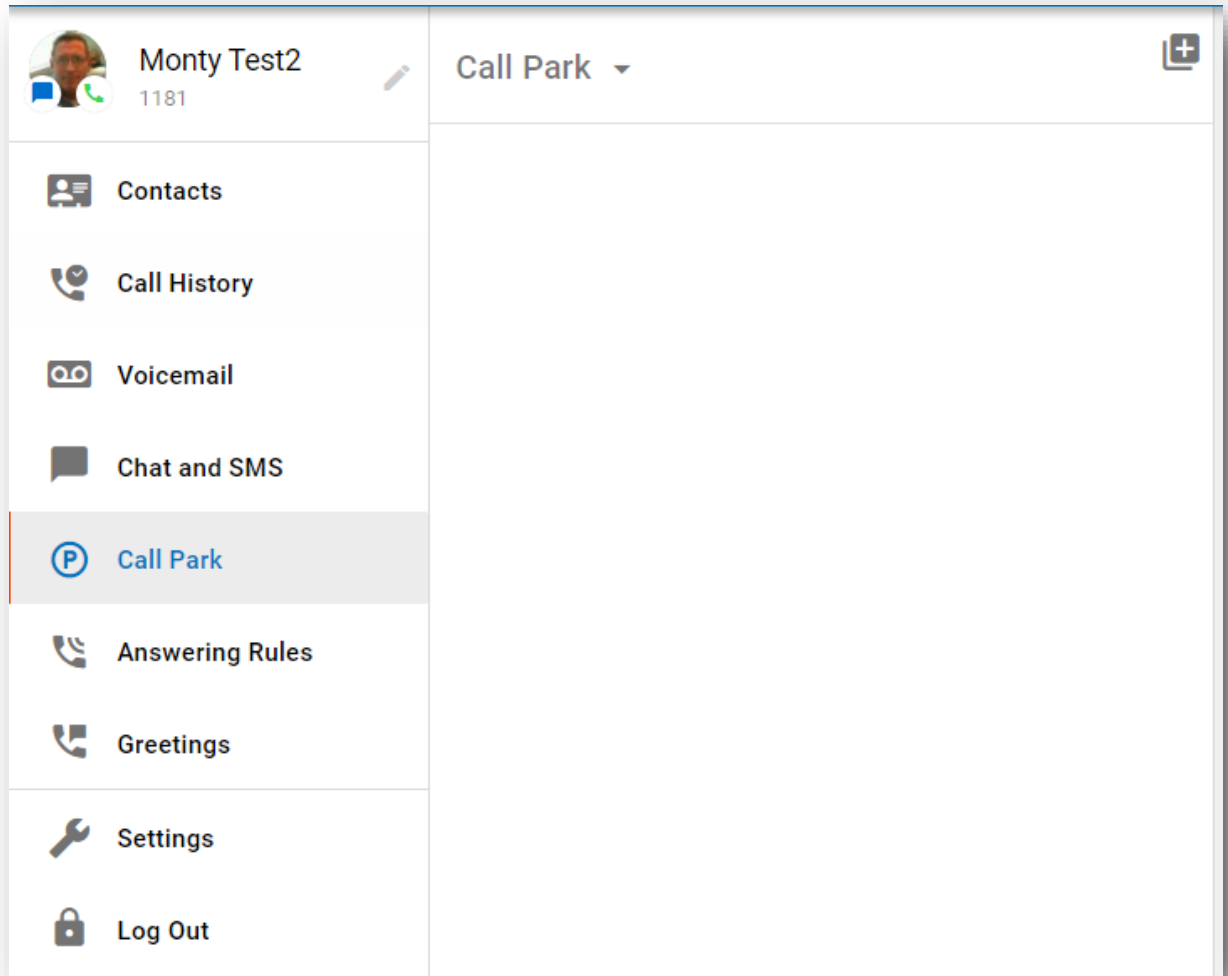
Chat and SMS

The Chat and SMS tab (if SMS is enabled and set up for your system) provide a summary of all current messages to you. Each message will be presented in a card containing the conversation.



Call Park

Call park is a feature that allows you to put a call on hold at one telephone set and continue the conversation from any other telephone set. Call park is different from a regular hold, because it creates a communal parking spot for the call that can be accessed by any team member.





Answering Rules

Answering rules are a way to setup forward or DND as either on at all times or based on time rules (see below). For example, you can use answering rules to send calls to your cell after hours evening, but then at night send calls straight to voicemail without ringing your desk first.

Answering Rules will be set up by your system administrator, and your system administrator will determine whether or not you have permissions to create your own answering rules.

Add an Answering Rule ✕

Time Frame This is when your answering rule will apply

Enabled

Do not disturb

Call screening

Call Forwarding

Always

On Active

When busy

When unanswered

When offline


Simultaneous ring

Include user's extension

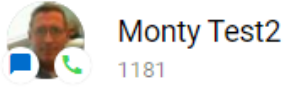



Ring all user's phones

Answer confirmation for offnet numbers

Just ring user's extension

 Greetings

The Greetings tab will show any current voice mail greetings you have created. You can have one active personal greeting at a time, but store multiple greetings for use at different times-with a maximum number of 20 total. To create a new greeting, simply click on the + icon, name your greeting and begin recording.


	<p>Greetings +</p>
<p> Contacts</p>	<p>▼ Hello, Monty Test2 is unavailable. Please leave a message. ✓</p>
<p> Call History</p>	
<p> Voicemail</p>	

← RECORD_A_GREETING

GREETING_NAME*
 Test Greeting

13 / 20

CLICK_TO_RECORD






Settings

The Settings tab provides info on your phone and provides you the ability to change microphone, audio output (for calls), ringer output, select a ringtone and call waiting tone of your choice and a PWA, or Progressive Web App, which will provide the user a pop-up screen when the user receives incoming calls. The PWA will reside in your computer's toolbar and can be set to automatically load on your computer system's startup.



Settings

	Call from 1181wp	Set by your administrator
	Microphone Default	You can select any microphone/audio output speaker that your computer can connect to such as bluetooth or USB headsets with microphone. If using Bluetooth, connect your Bluetooth device to your computer and then select from here
	Audio output Default	
	Ringer output Default	Set your ringer output to your headset, or to an external speaker connected to your computer to allow you to hear when near your desk
	Ringtone Default	8 ringtones are available to use
	Call Waiting Tone Enabled	Set to Enabled, One Time, or Disabled
	Install PWA Install Progressive Web App	Click this icon and an installation wizard will pop-up (Figure 1)
	Version 43.4.1	

**Install CONNECTmobile Web app**
Publisher: core2-jxn.secureuc.net
This site can be installed as an application. It will open in its own window and safely integrate with Windows features.



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