



# PhoneManager Softphone User Guide

## For PC & MAC Devices

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# 1. Introduction to PhoneManager Softphone User Guide

## 1.1. Purpose of this document

This guide covers the basic operation of the Eco PhoneManager softphone that is available as standard for all Users.

## 1.2. Related applications and documents

The System Administrators Guide defines how to set up the phone system for a Company account and all its associated users. This can be downloaded from the portal website via the Support -> Downloads menu.

The Setup and User Guide provides guidance for the ordinary user on the facilities and features of the phone system. It should be used in conjunction with this manual. This can be downloaded from the same Support menu on the portal website.

# 2. Overview

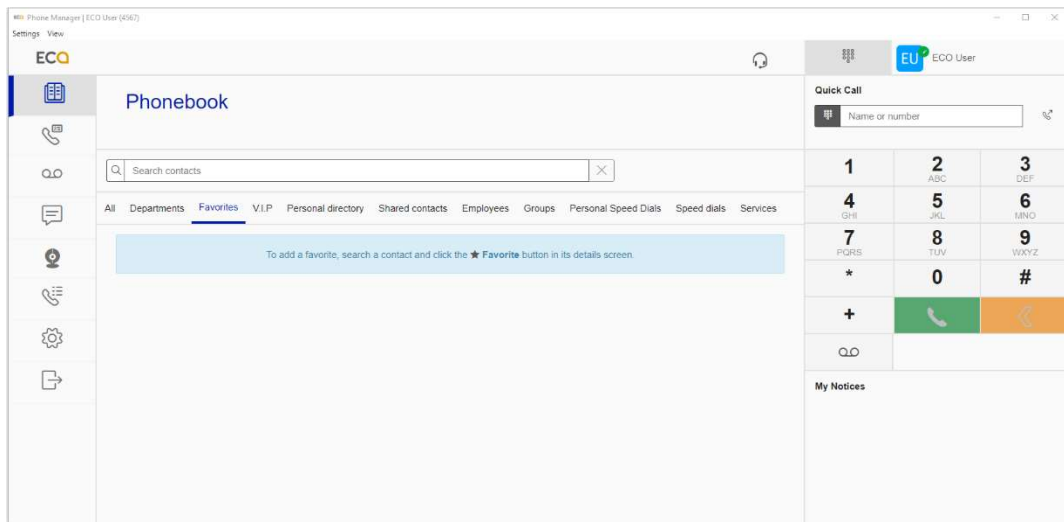
The Eco PhoneManager softphone client application is available for download from the following URL

<https://phonemanager.my-eco.app/install/>

The download and installation processes are considered to be PC and MAC controlled and therefore outside the scope of this document.

## 3. PhoneManager

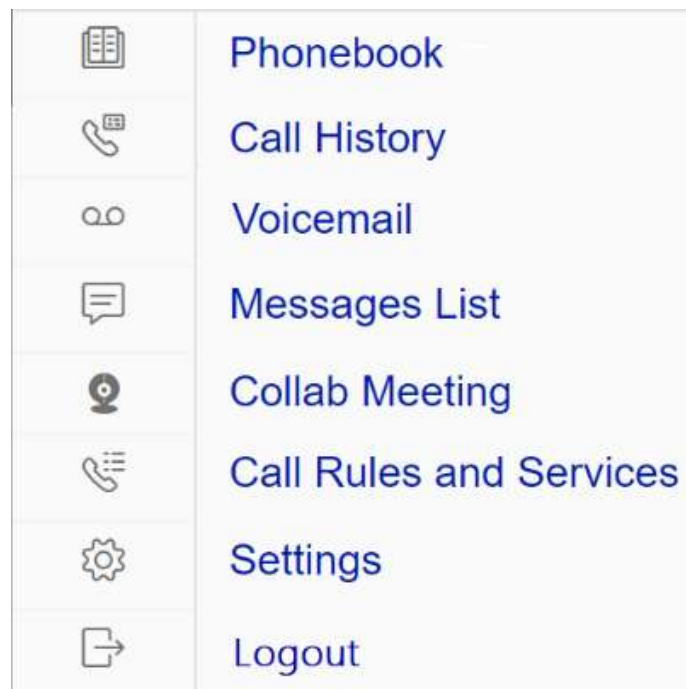
### 3.1. Main Screen



The main screen provides an overview of the PhoneManager application. From here you can access the features provided within the service.

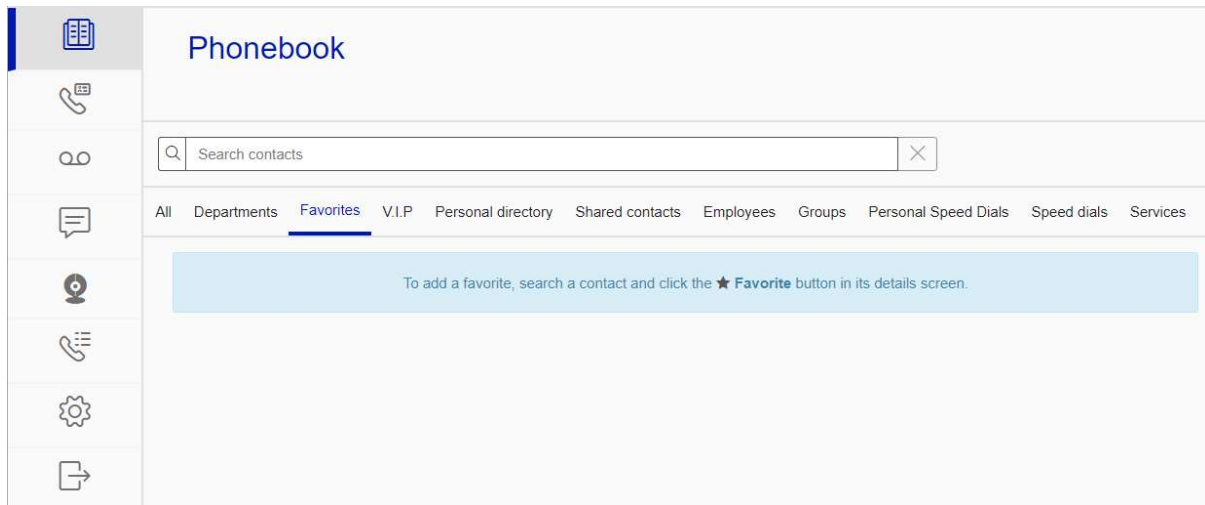
## 4. Option Panel

The left-hand side panel provides access to the feature set with associated information within the central Panel



## 4.1. Phone Book

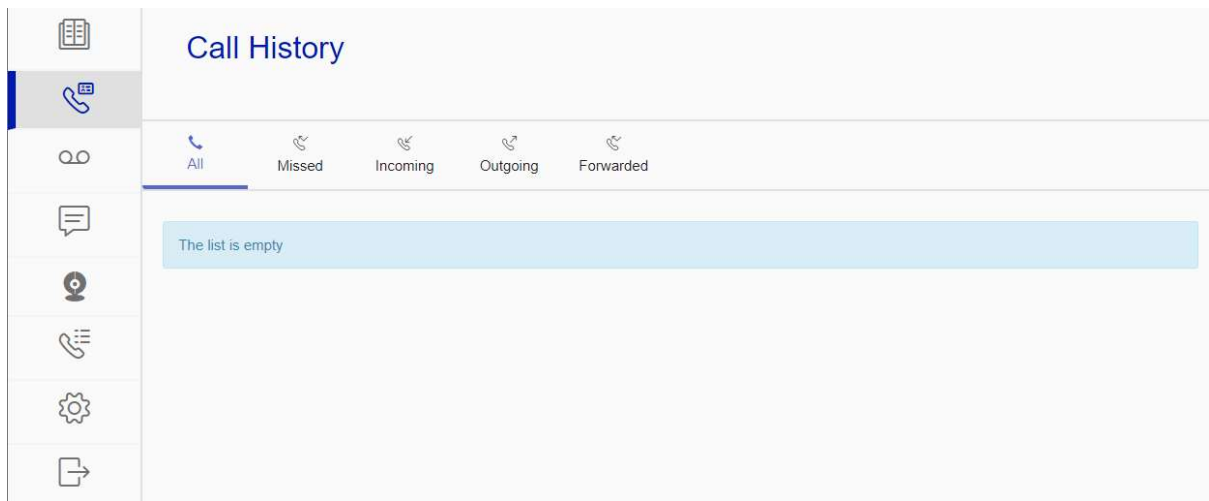
From the Phone Book you have access to Users, Groups, Department and Shared contacts within the platform.



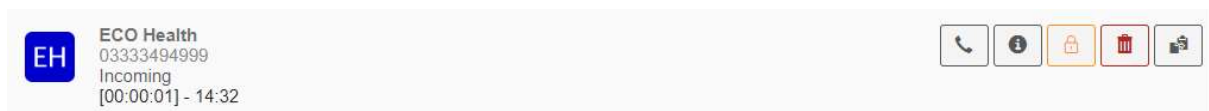
<b>Search Bar</b>	The search option allows you to quickly find entries by entering there name of number.
<b>All</b>	This shows every entry within the system.
<b>Department</b>	Shows Users by department.
<b>Favourites</b>	This is the default option when selecting the Phone Book and Users can be selected to be shown for your most used.
<b>V.I.P</b>	If a Users is selected as a “V.I.P”, any call to you from this User will override “DND” & “Presence” call forwarding options.
<b>Personal Directory</b>	Allows you to store personal contact numbers.
<b>Shared Contacts</b>	Is the system speed dial directory.
<b>Employees</b>	Is a list of all Users.
<b>Groups</b>	Is a list of all Groups.
<b>Personal Speed Dials</b>	Future Development.
<b>Speed Dials</b>	Future Development.
<b>Services</b>	Is a list of IVR’s and Call Park Positions.

## 4.2. Call History






Shows all you calls broken down in to All, Missed, Incoming, Outgoing, Forwarded



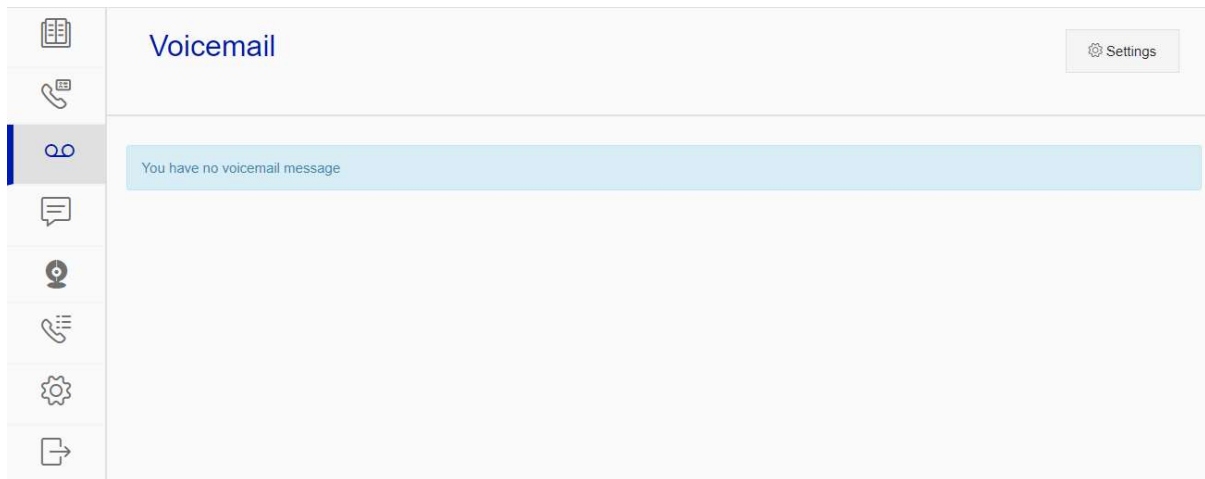
When a call is made, received, missed or forwarded it will be registered in the relevant field.



With each entry you will be provided with the following options.

- |   |                                   |
|---|-----------------------------------|
|  | Allow you to call the number back |
|  | Shows contact details             |
|  | Add number to Block list          |
|  | Delete Entry                      |
|  | Copy number to clipboard          |

### 4.3. Voicemail

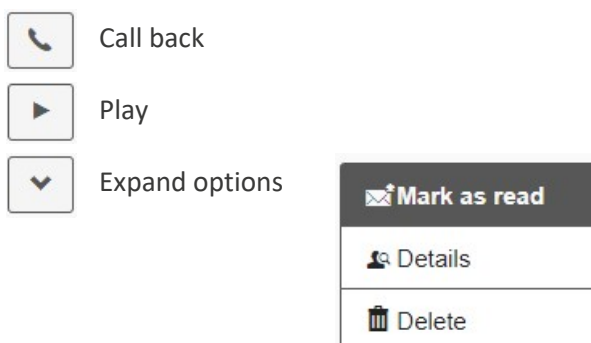
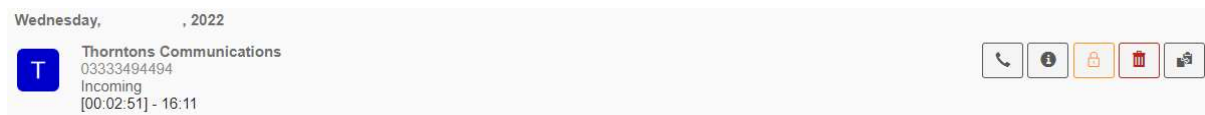


When a new Voicemail is received you will be notified in the left-hand panel with the number of new messages.



You will also receive an email notification with a copy of the voicemail attached, this option can be altered in “Settings”.

When you select the voicemail tab you will see the details of the message.



Note: by default, your mailbox can only hold 20 Messages.

From here you can manage your voicemail

Allow callers to leave a voicemail message

Yes
No

**My voicemail greeting**

Default greeting

> Manage greetings


**Notification by email**

By email with voicemail attached

Notification by SMS

Yes
No

To record your own personal greeting select “Manage greetings”, from here you can either verbally record a new message or upload a pre-recorded message.


You may customize here your voice mail greeting, by recording:

- either a new whole greeting
- or just your audio name, that will replace your extension number during the default greeting

I customise my whole greeting

Call me to record or listen

Upload an audio file

I customise my audio name only

Call me to record or listen

Upload an audio file

Temporary message

Call me to record or listen

Upload an audio file

Under “Notification by email” you can select if you want to be notified by email and with what options.

By email with voicemail attached

None

By email

By email with voicemail attached

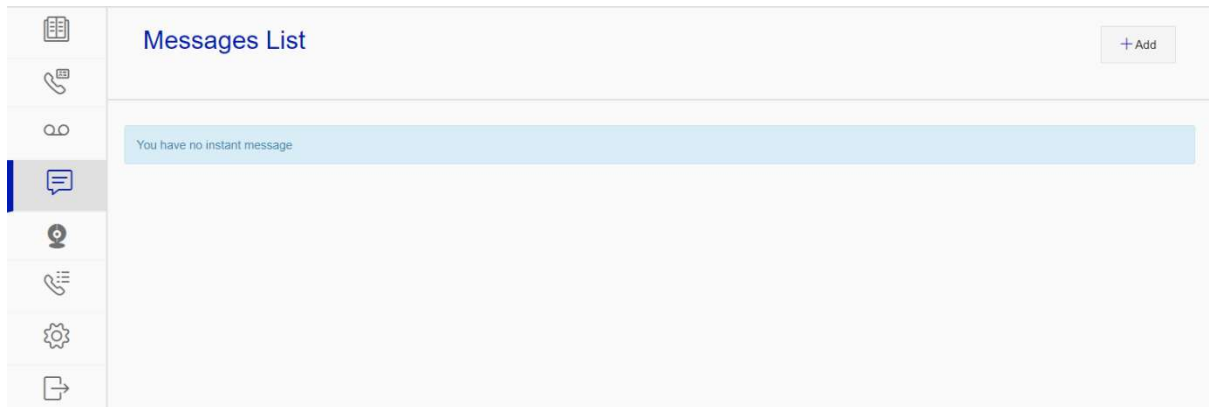
By email with attachment, marked as read in voicemail system

By email with attachment, not left in voicemail system

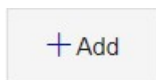


## 4.4. Messages

From here you can start and manage any direct or group messages.



To create a new message, click on



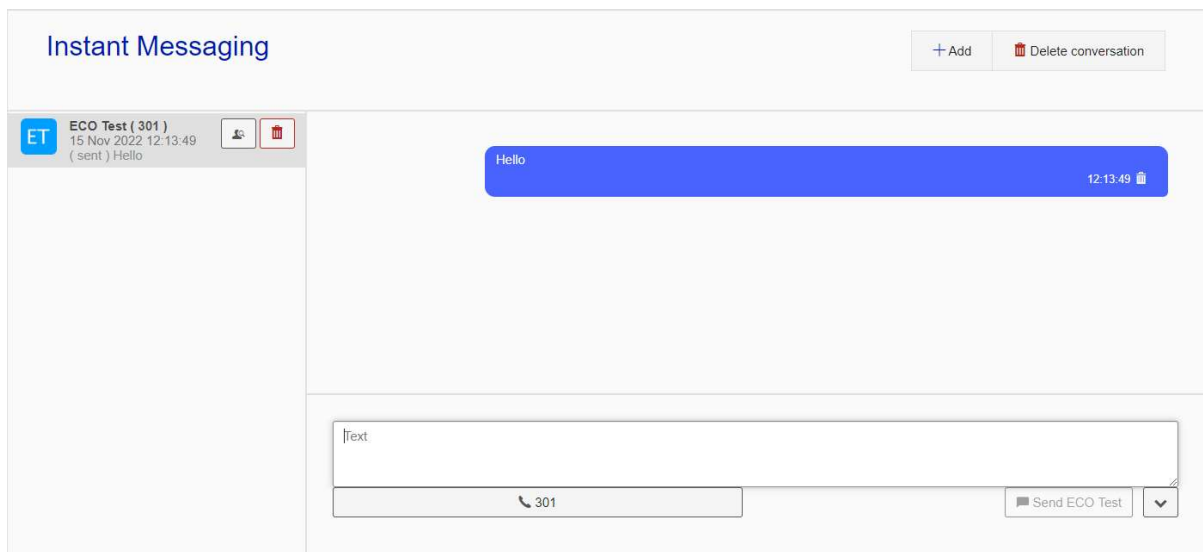
Enter the Users name (User option will be presented), type the message to be sent and press Send.

A message composition form with a light gray background. It features a "To" label above a text input field, and a "Text" label above a larger text area. At the bottom right, there is a "Send" button with a speech bubble icon and a small downward-pointing arrow in a square button.

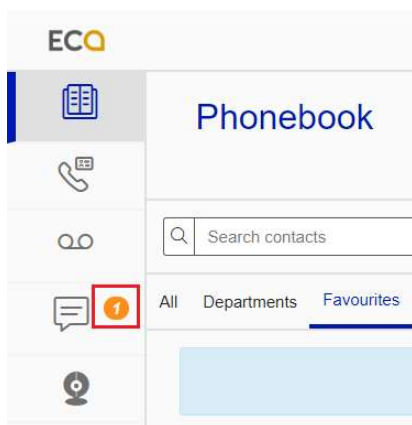
Through the drop-down option you can manage how your "Return" key functions.

A message composition form similar to the previous one, but with additional options. It includes the "To" and "Text" fields. The "Send" button is present, and next to it is a square button with an upward-pointing arrow, which is highlighted with a red border. Below these fields are two buttons: a dark gray button labeled "Click to send ( Enter adds a new line )" and a light gray button labeled "Press Enter to send". At the bottom, a light blue banner contains the text "Use Shift+Enter to add a new line".

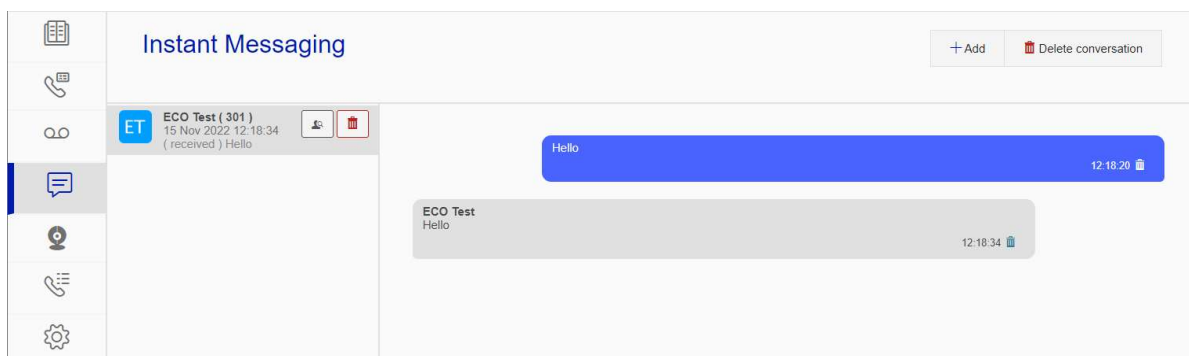
Once a message is sent the details of the message are shown within the message screen



When a new message has been received a notification will be presented in the Message tab.

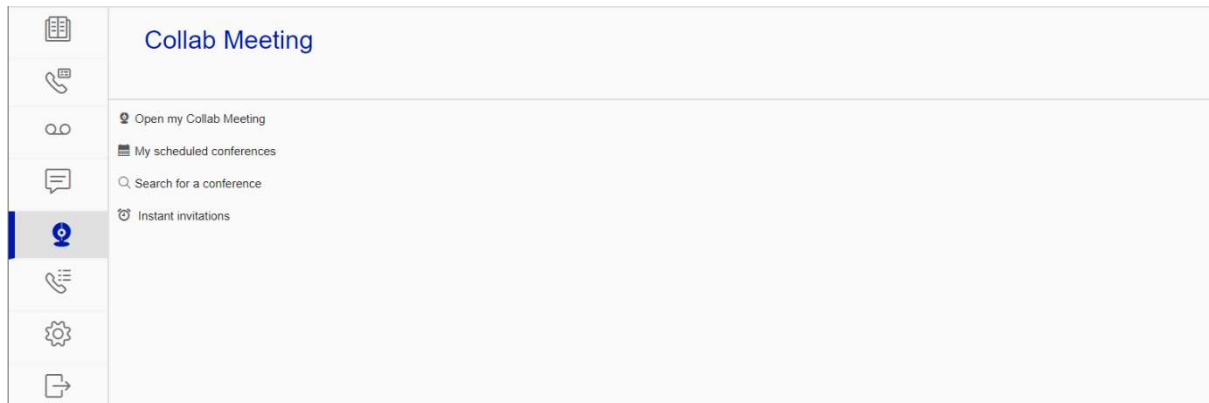


Click on the Message tab and you will see the response.

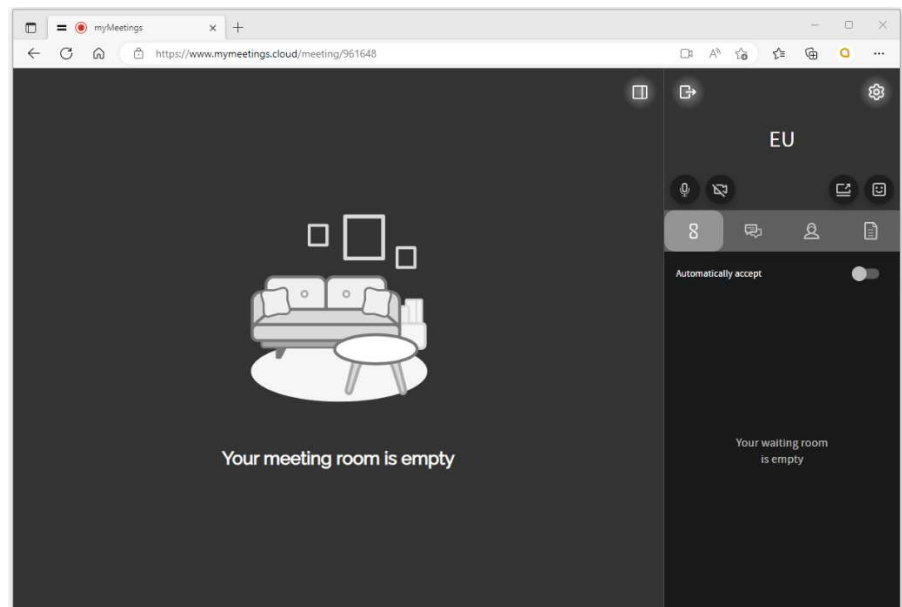


## 4.5. Collab Meeting

From here you can access and manager your Collab Meeting room.



**Open my Collab Meeting** This will use your default browser to open your Collab Meetings room



**Key:**



Display/hide rightbar



Display/hide settings



Enable/disable camera



Stickers overview



Logout

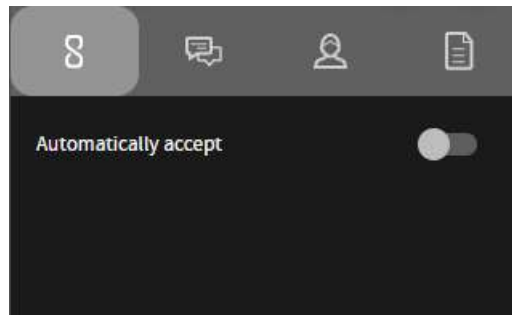


Enable/disable microphone

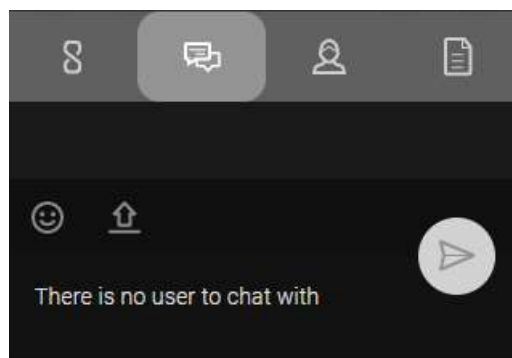


Start/Stop screensharing

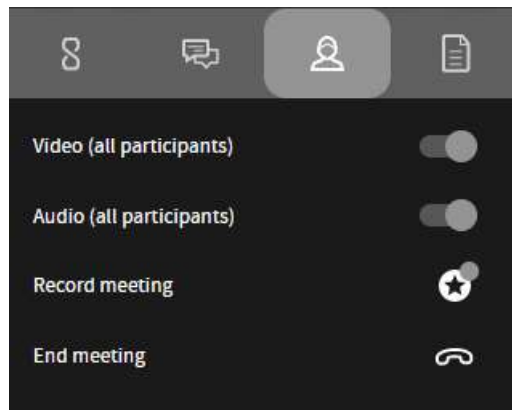
**Waiting Room** – you can automatically accept Users entering your meeting room or accept on an individual basis.



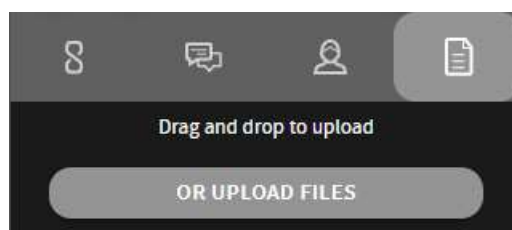
**Group Chat** – message all parties within the meeting.



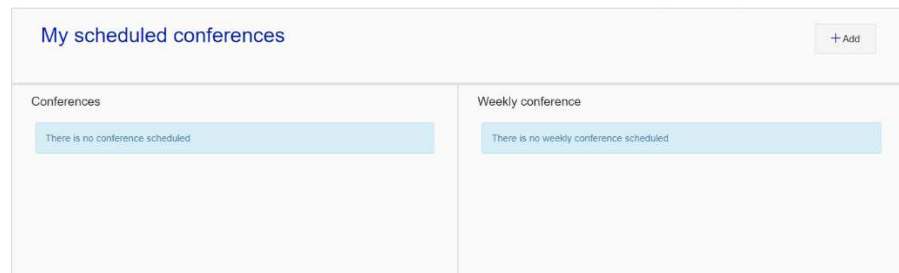
**Users** – control User settings.



**Files** – file share documentation with the meeting.



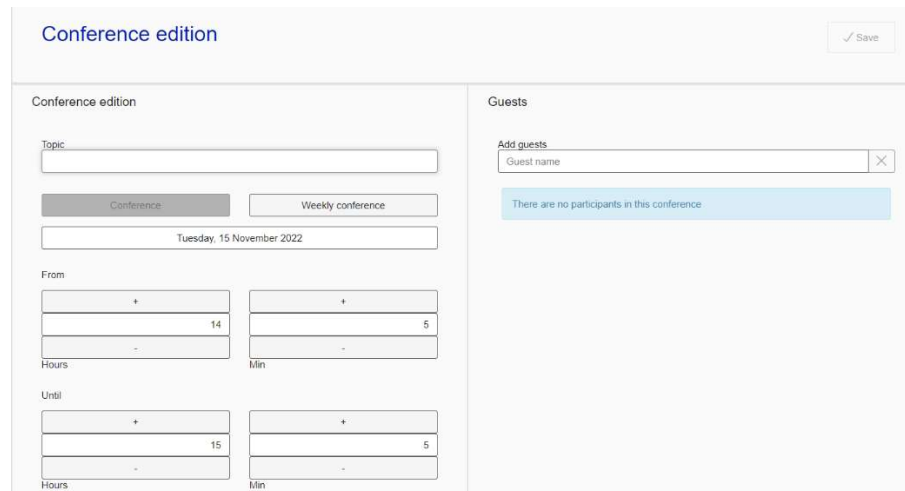
**My scheduled conferences** Create and displays any scheduled Collaboration meetings



To create a new collab meeting, click on

+ Add

Enter the “Topic”, select if it’s a “Conference” (one-off) or a “Weekly conference”, enter the date and time and add the participants (either by User Name or email address), once complete click “Save”



Any meetings that you have been invited to will also appear here.

**Search for a conference** Allows you to search for scheduled conferences



## Instant invitations

Instantly invite User(s) to an ad hoc collab meeting

### Instant invitations

Invitation link

<https://www.mymeetings.cloud/meeting/961648>

My conference type

Collab Business, 2 participants

Guests

Add guests

×

Either copy the invitation link to send via a medium of your choice

### Invitation link

<https://www.mymeetings.cloud/meeting/961648>

My conference type

Collab Business, 2 participants

Or enter the email address of the participant and click on the + to send.

### Guests

Add guests

×



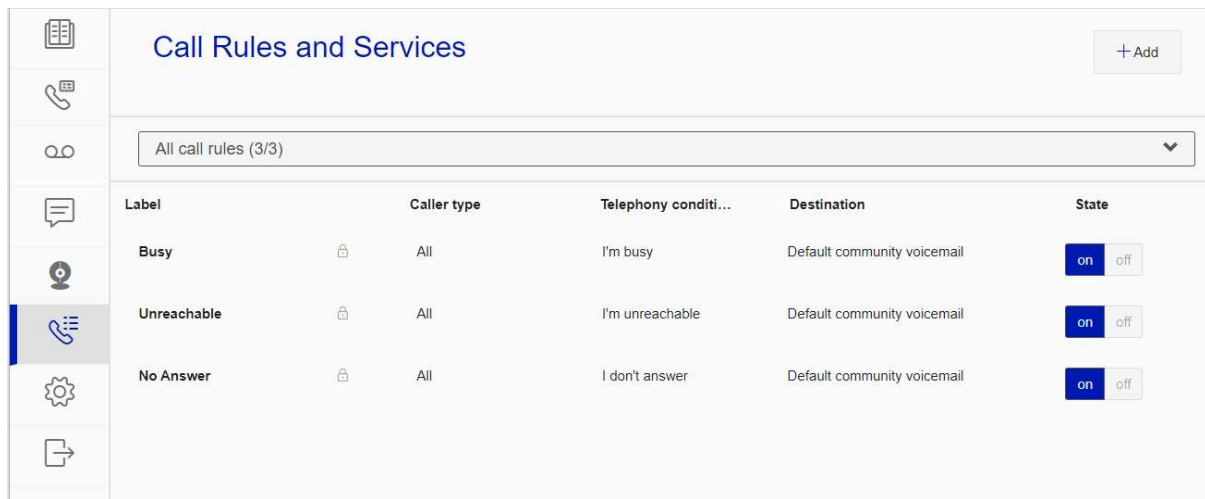
help@my-ecohealth.co.uk

Unknown

+

## 4.6. Call Rules and Services

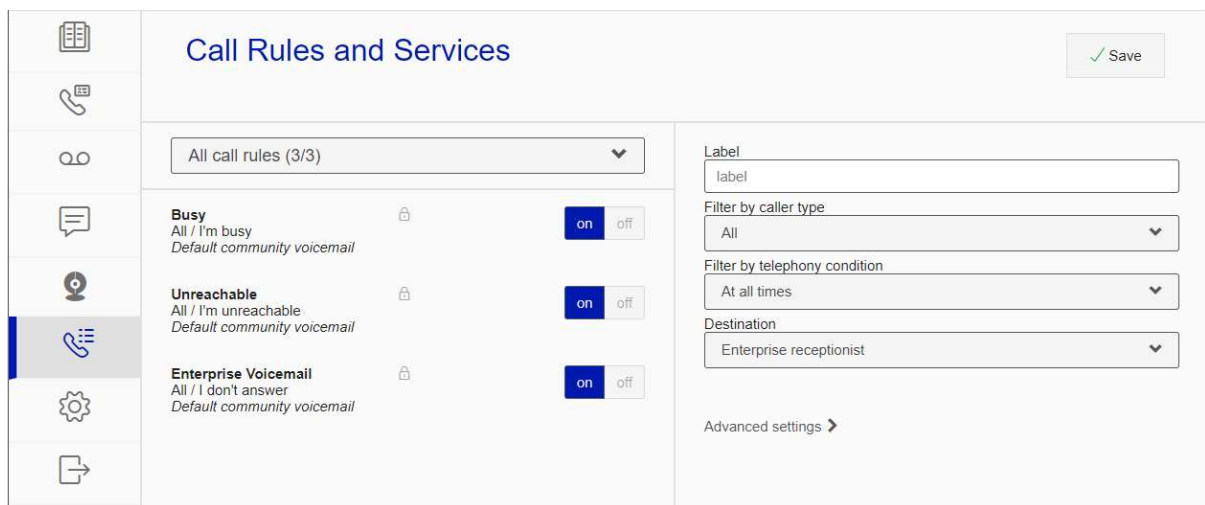
From here you can enable and disable the default calling rules and create your own bespoke settings.



Label	Caller type	Telephony condi...	Destination	State
Busy	All	I'm busy	Default community voicemail	<input checked="" type="checkbox"/> on <input type="checkbox"/> off
Unreachable	All	I'm unreachable	Default community voicemail	<input checked="" type="checkbox"/> on <input type="checkbox"/> off
No Answer	All	I don't answer	Default community voicemail	<input checked="" type="checkbox"/> on <input type="checkbox"/> off

To create a new calling rule, click on

+ Add



Label	Caller type	Telephony condition	Destination	State
Busy	All / I'm busy Default community voicemail	<input checked="" type="checkbox"/> on <input type="checkbox"/> off		
Unreachable	All / I'm unreachable Default community voicemail	<input checked="" type="checkbox"/> on <input type="checkbox"/> off		
Enterprise Voicemail	All / I don't answer Default community voicemail	<input checked="" type="checkbox"/> on <input type="checkbox"/> off		

Advanced settings >

You will see the current calling rules and be able to create your own.

**Label**

Give the rule a name

**Filter by caller type**



All

All

Anonymous

External

Internal

## Filter by telephone condition

At all times	^
At all times	
I don't answer	
I'm busy	
I'm unreachable	

## Destination

Enterprise receptionist	^
Enterprise receptionist	
Default community voicemail	
Others	

Enterprise Reception – Main Reception.  
Default community voicemail – Voicemail.  
Other – enter a number as required.

To add additional options and associate a calling rule to a “Presence” status, Select “Advance settings”

Label
label
Filter by caller type
All
Filter by telephony condition
At all times
Destination
Enterprise receptionist
Advanced settings >

## Advance Settings

Advanced settings >
Filter by specific caller
Filter by called number
Short number
PSTN numbers
PLMN numbers
Filter by presence state
Any professional states
Available
Working
Customer meeting
Course training
Travelling
Lunch
Any personal states
Away
Sick

**Filter by specific caller** To associate the rule to a specific callers number enter here.

**Filter by called number** Select the relevant number type.

**Filter by presence state** You can associate the calling rule to a “Presence” status.



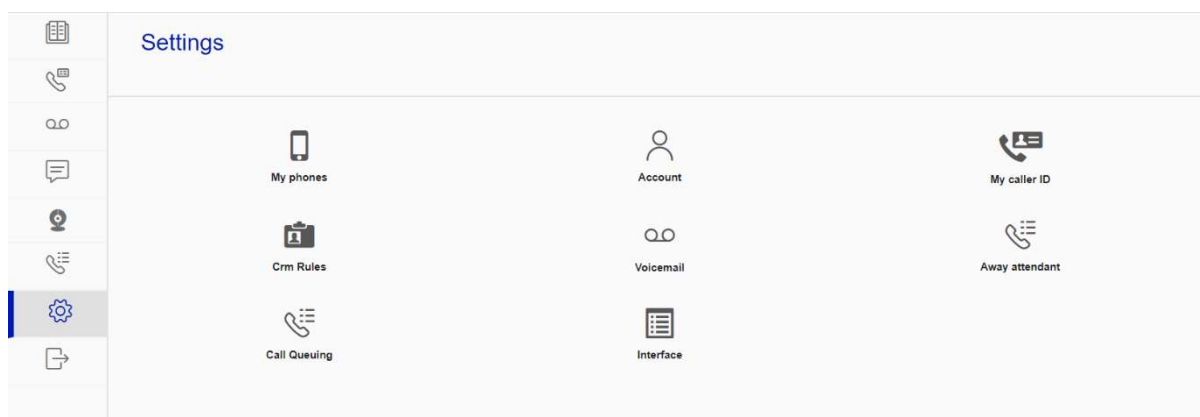
Eg – To redirect all calls to voicemail when the “Presence” status of “Lunch” is selected.

Label
All Calls
Filter by caller type
All
Filter by telephony condition
At all times
Destination
Default community voicemail
Filter by presence state
Any professional states
Available
Working
Customer meeting
Course training
Travelling
Lunch
Any personal states
Away
Sick
On vacation

When you change your “Presence” status to Lunch all calls will go straight to your voicemail.

Presence state
Available
Available
Away
Lunch
Working
Customer meeting
Travelling
Course training
On vacation

## 4.7. Settings



### My phone

allows you to see your phone devices, connect/disconnect your Softphone and change your call options.

My phones

**Phones**

VoicePad  
(Phone Manager)  
Accept simultaneous calls 2

yesno

Disconnect softphone

Geographic Area

Make a call for test

**My caller ID**

+442045534567

Do not disturb

yesno

**Allow call waiting**

Without call waiting, one active call makes me busy

yesno

Assisted blind transfer

BlindWait ringing

**Mobile calls restrictions**

My Invoice : inactive

Call barring : UK-Only (Call,SMS)

## Account

Here you can update your User settings.

The screenshot shows a 'Settings' page with a header 'Settings' in blue. Below the header is a dropdown menu labeled 'Account' with a person icon. The main content area is divided into two columns. The left column contains: 'Identity '4567@eco-' with a blue 'EU' logo and 'ECO User Available' status; a 'Change password' button with a lock icon; a 'Language' dropdown set to 'English (English)'; 'Bank Holidays' section with 'Activate the bank holidays calendar?' (yes/no buttons) and a 'Learn more' link; and 'Date format' set to '24h' (12h (AM/PM) / 24h buttons). The right column contains 'Personal Details' with 'Home' and 'Mobile' fields (each with an edit icon) and 'My numbers' with two input fields containing '+44' and '4567'.

## My caller ID

Here you can update your caller settings.

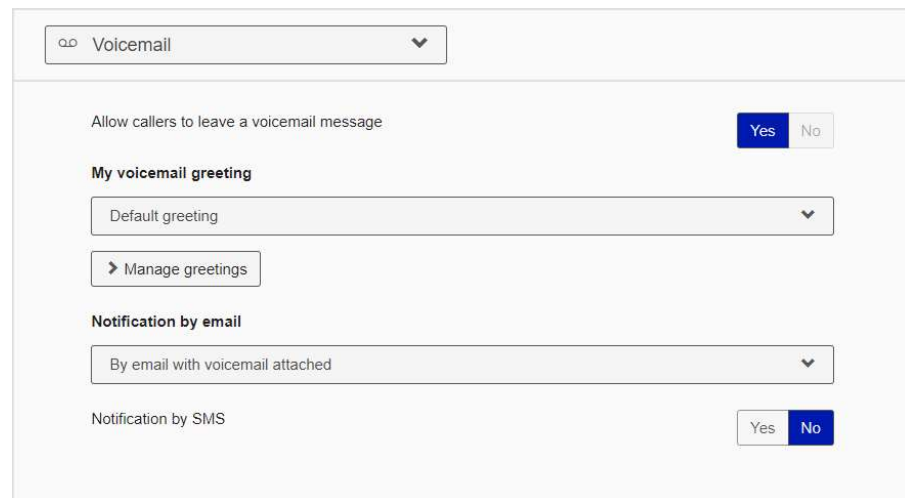
The screenshot shows a 'My caller ID' settings page. At the top is a dropdown menu labeled 'My caller ID' with a phone icon. Below it is a 'Hide my caller ID' section with 'yes' and 'no' buttons, where 'no' is selected. Underneath are two buttons: 'manual mode' (selected) and 'managed by presence state'. Below these is a 'My caller ID' label and a 'Current caller ID' dropdown menu showing '+44'.

## CRM Rules

N/A

## Voicemail

(As show previously)



Voicemail settings interface. At the top is a search bar with 'Voicemail' and a dropdown arrow. Below are three sections: 1. 'Allow callers to leave a voicemail message' with 'Yes' and 'No' buttons. 2. 'My voicemail greeting' with a 'Default greeting' dropdown and a 'Manage greetings' button. 3. 'Notification by email' with a dropdown set to 'By email with voicemail attached'. At the bottom is 'Notification by SMS' with 'Yes' and 'No' buttons.

## Away attendant

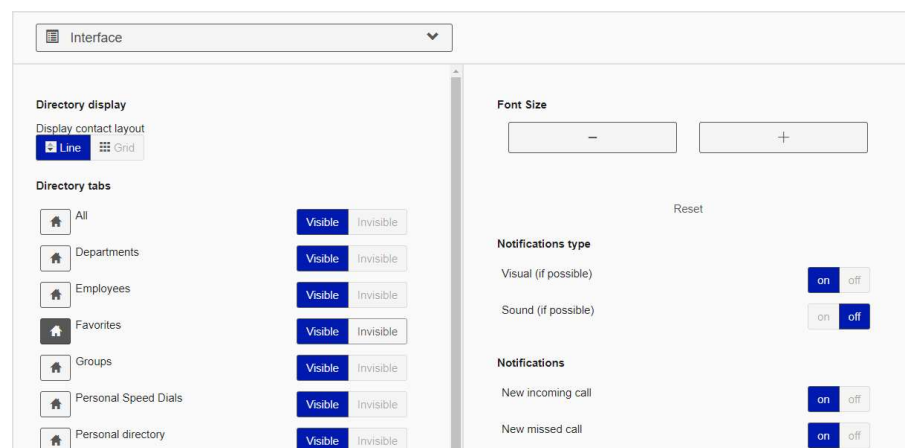
N/A (Contact Centre only)

## Call Queuing

N/A (Contact Centre only)

## Interface

Allows you to adjust how you view information and what tabs are viewable in the “Phonebook” screen, the font size of PhoneManager and what/how notifications are displayed.



Interface settings interface. At the top is a search bar with 'Interface' and a dropdown arrow. The main area is divided into two columns. The left column contains: 'Directory display' with 'Line' and 'Grid' buttons; 'Directory tabs' with a list of tabs (All, Departments, Employees, Favorites, Groups, Personal Speed Dials, Personal directory) each with 'Visible' and 'Invisible' buttons. The right column contains: 'Font Size' with '-' and '+' buttons and a 'Reset' button; 'Notifications type' with 'Visual (if possible)' (on/off) and 'Sound (if possible)' (on/off) buttons; and 'Notifications' with 'New incoming call' (on/off) and 'New missed call' (on/off) buttons.

## 4.8. Logout

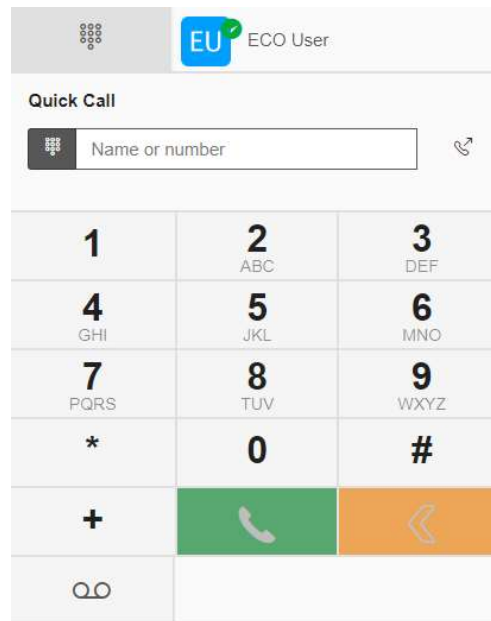
Logs the User out of PhoneManager.



## 5. Calling Features

### 5.1. Outgoing Call

The Dialpad allows Users to find existing entries via the “Quick Call” search box or manually dial via the Key pad.



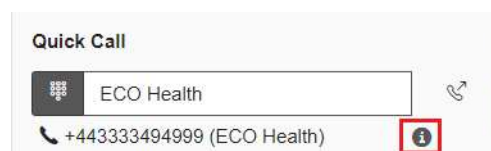
#### Quick Call

Type the name of the contact you wish to call, if there is an existing entry then it will be displayed below the text box.

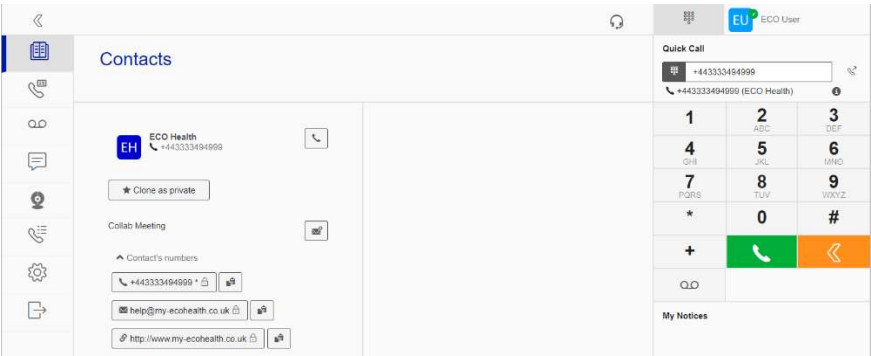


Click on the displayed contact to call the number.

To see additional information for the contact record, click on the information icon



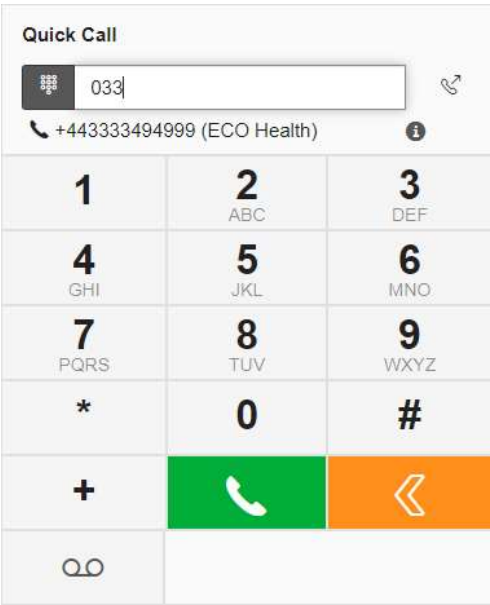
The full record will be displayed.



**Manual Dial**

To dial a number manually simple enter the digits and press the green “Handset” key to start the call.

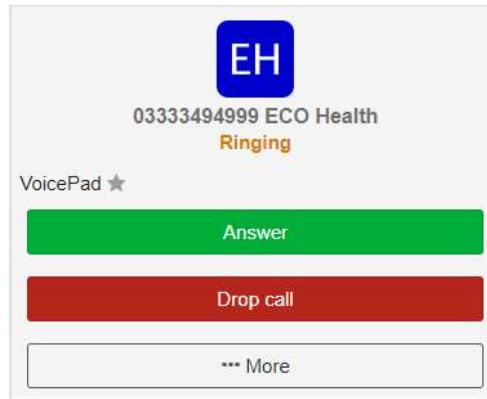
As you enter the digits the system will search and offer options from the contact list.



## 5.2. Incoming Call

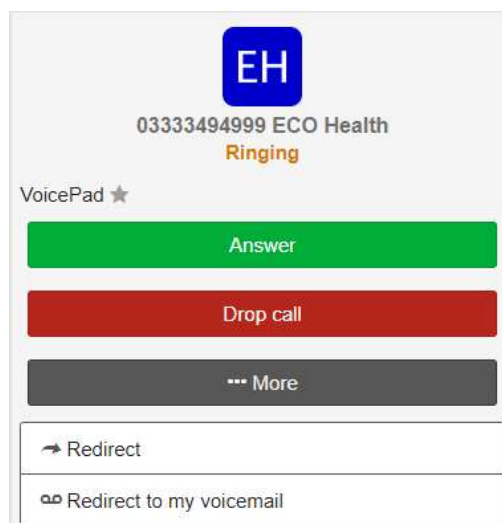
### Answering Call

When an incoming call is presented the callers number will be displayed, if there is a record matching the number it will alpha tag the call with the name as well.



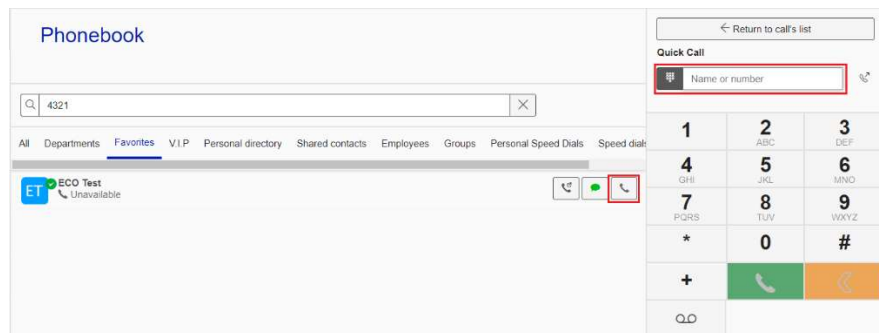
To answer the call simply click on the green “Answer” key.

If you select “More” you have the option to Redirect the calls to another User/Group or send straight to Voicemail

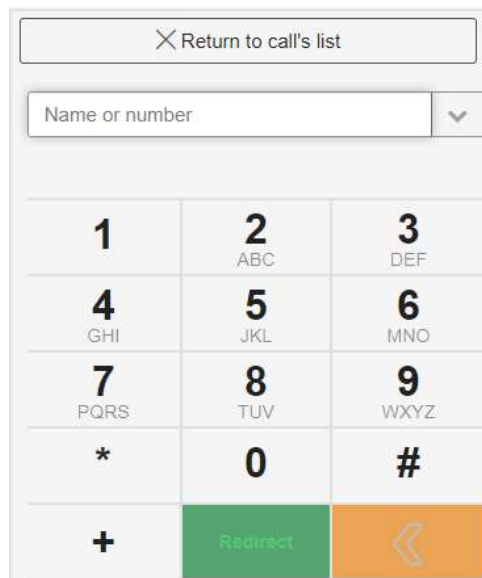


## Redirect

When using “Redirect” you will be presented back the Dial pad. You can either enter the location and press the green “Redirect” Key or simply select the Dial button of a User from the Phonebook.



To go back to the call, press the “Return to Call’s list” at the top of the Dial pad.



## Redirect to my VM

sends the call directly to your voicemail box.

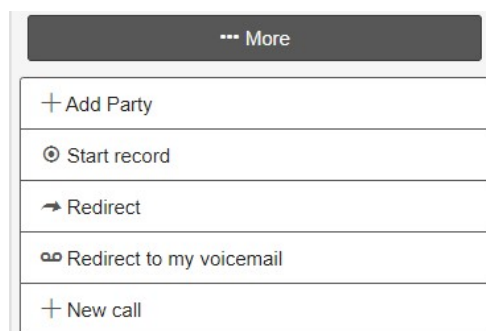


### 5.3. In Call Options

Whilst on an active call, you are given the option to place the call on Hold, open the dial pad for auto attendant digit selection or leave the call.



By selecting “More” you are presented with four further options, Add Party, Start Recording, Redirect Call, Redirect to your Voicemail or initiate a New Call.



<b>Add Party</b>	This allows you to directly add (or conference) another User into the call. You will be returned to the Dial pad to allow you to enter or Select a User and initiate the call by selecting the green “Add Party” key. When the other party answers the call, they are immediately brought into the live call.
<b>Start Record</b>	All calls are automatically recorded by default, this option is not applicable.
<b>Redirect</b>	Calls will be transferred directly to the selected party.
<b>Redirect to my VM</b>	sends the call directly to your voicemail box.
<b>New Call</b>	This option allows you to initiate a new call to another User/party and placing the initial call on hold.

## 5.4. Holding a Call

To placing a call on hold and to retrieve the call simply select the Hold & UnHold options.

### Call Hold

Select the Hold key





### Retrieve Held call

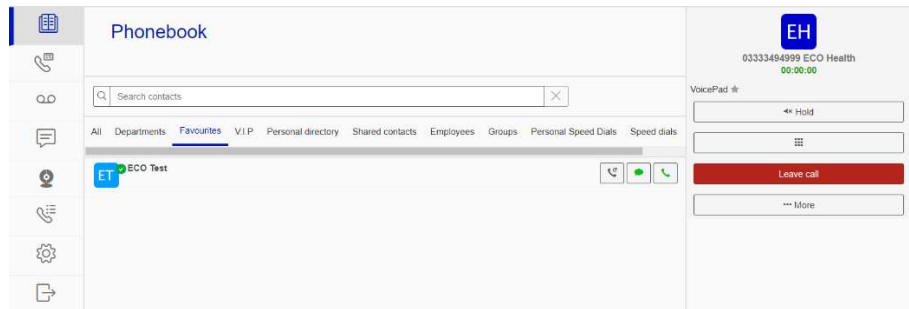
Select the UnHold key



## 5.5. Transferring a Call

### Directory Transfer

Simply find the contact you wish to transfer the call to from the Phonebook and click on the  icon for a Supervised transfer or the  icon for an Unsupervised transfer.

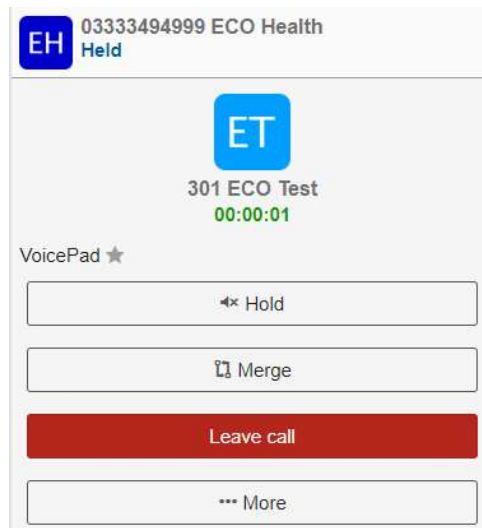


Supervised Transfer (announce the caller)

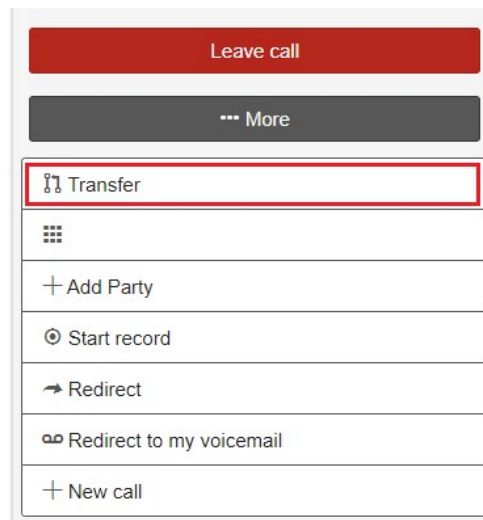


Unsupervised Transfer (call is directly pass over)

With a Supervised transfer you see both the initial Held call and the new active call.



To Transfer the call select “More” and select “Transfer”

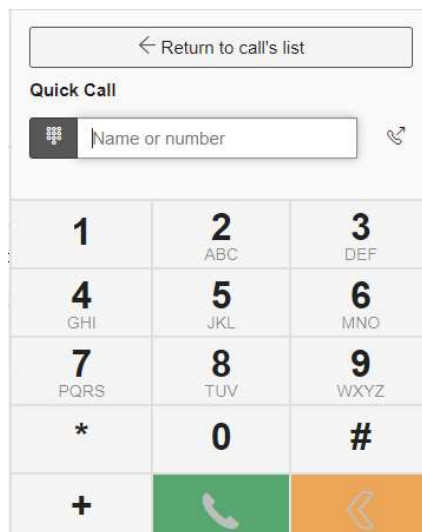


The call will be released and transferred.

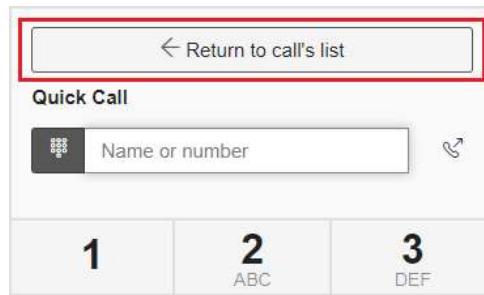
**Non-Directory Transfer** To initiate the call to someone outside of the system directory, click on “More” and select “New call”



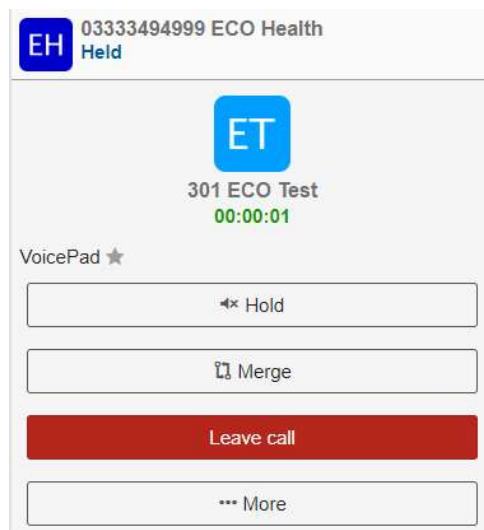
**New call** - You will be presented back the Dial pad. Simply enter the phone number and press the green Handset button.



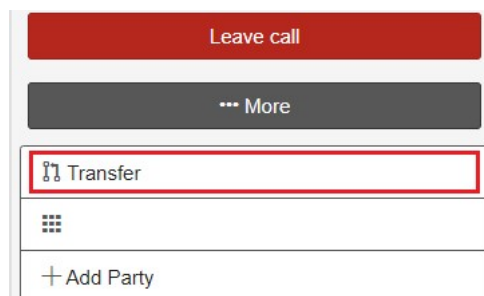
To see both active calls you must press the “Return to calls list” at the top of the dial pad.



You will now see both the initial Held call and the new active call



To Transfer the call select “More” and select “Transfer”



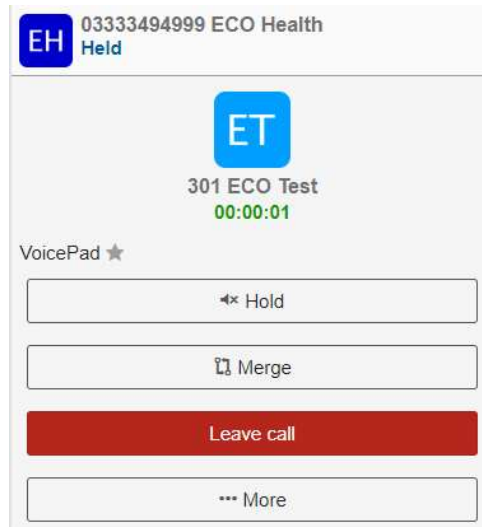
The call will be released and transferred.

## Call Retrieval

If the called party is not available or does not want to take the call you can leave the active call. The original call will remain on hold so you can either take off hold or try someone else.

## 5.6. Merging a Call (3way Conference)

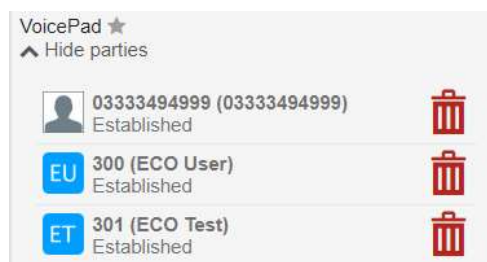
Follow the same process to as a Supervised Transfer, when the party you wish to join the call has answered simply press the “Merge”



By selecting the “Show parties” you can see all callers.

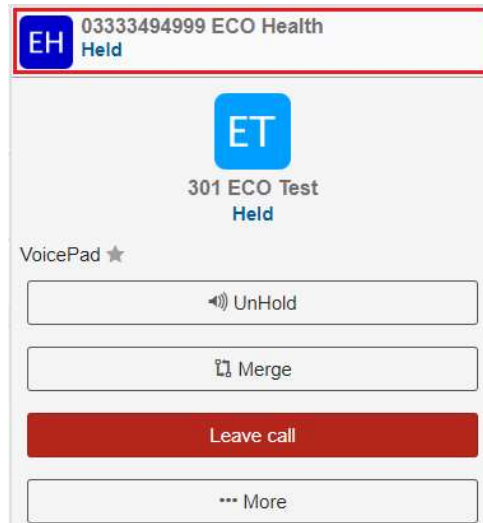


You can remove a caller by clicking on their respective bin icon

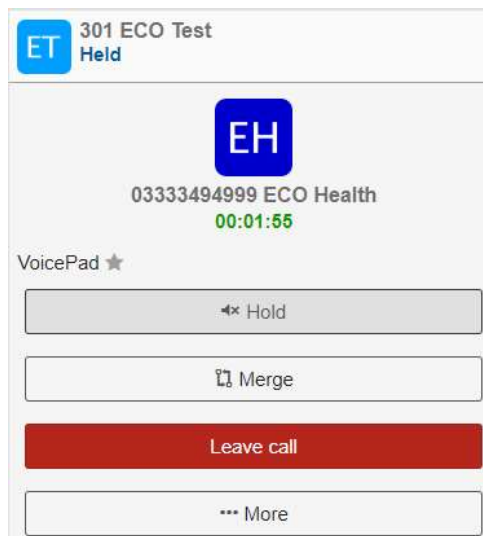


## 5.7. Enquiry & Call Switching

If you need to make an enquiry call or need to go back to the caller before transferring, you can. Simply place the active call on Hold and select the original call.

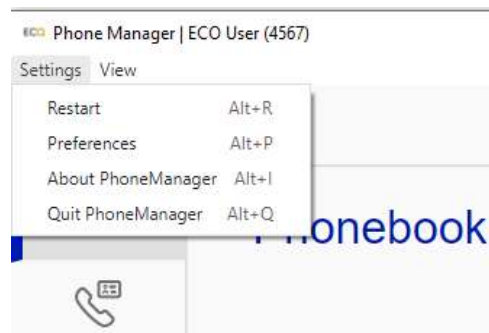


Through this process you can flip between calls.

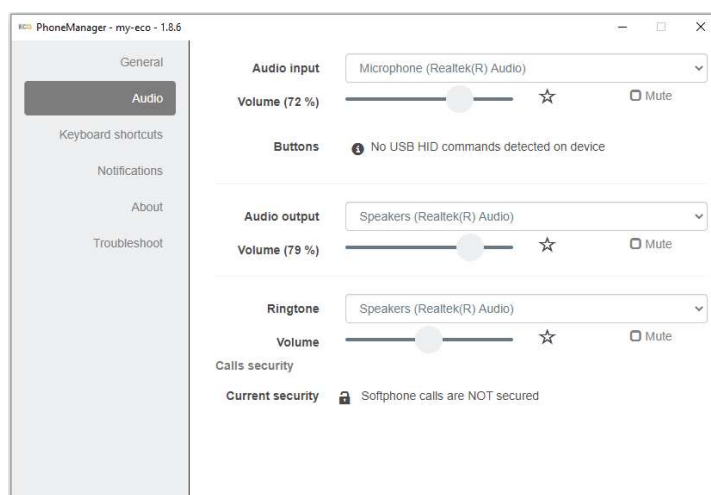
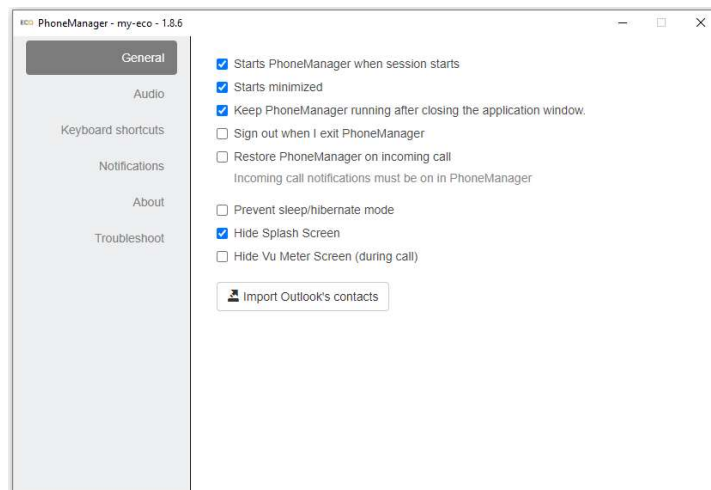


## 6. Device Settings

### Device Settings

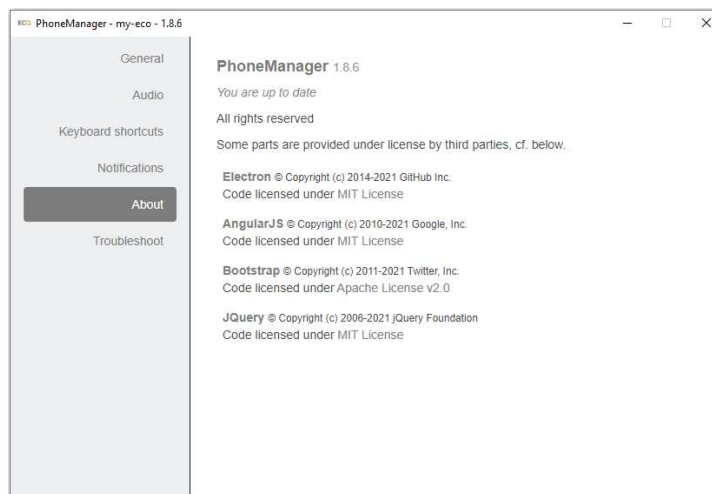
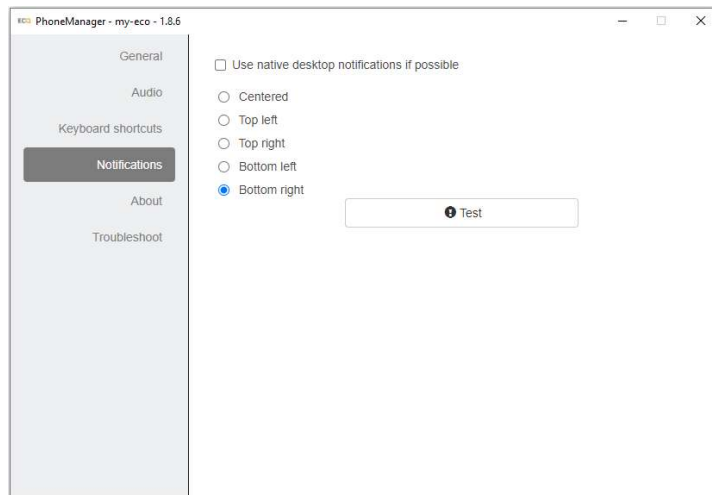
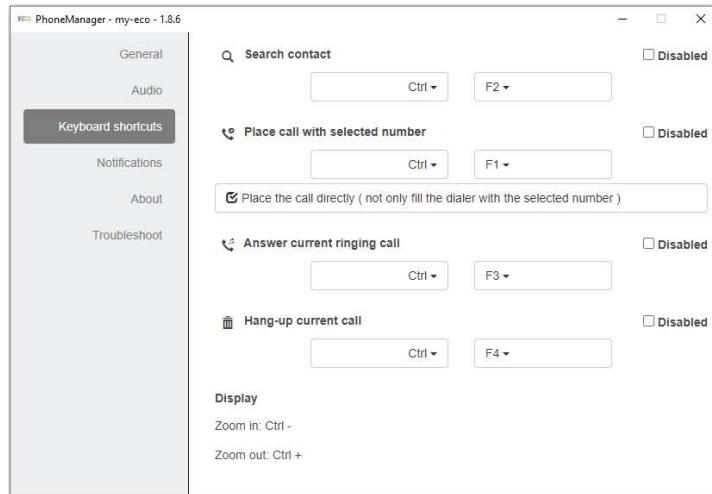


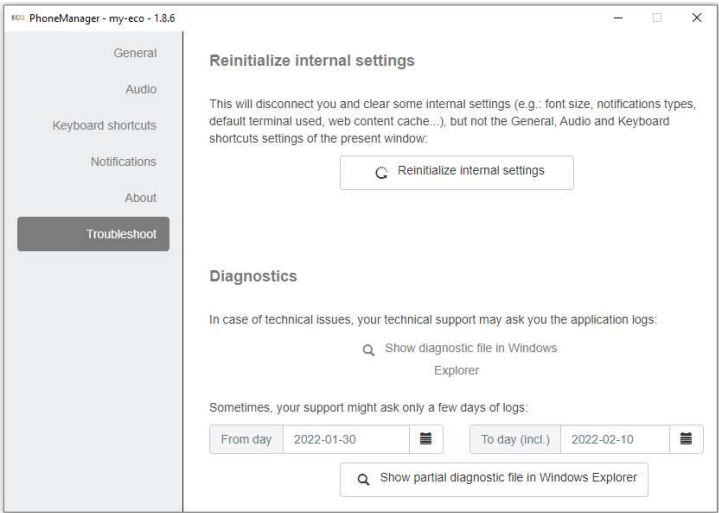
The follow settings can be configured to ensure PhoneManager is working as expected.



When the desired Audio Settings have been selected, by selecting the ★ it will mark this option as your preferred setting.







Perspective

