ECOHealth

PhoneManager Softphone User Guide

For PC & MAC Devices

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✉ help@my-ecohealth.co.uk

Contents

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.
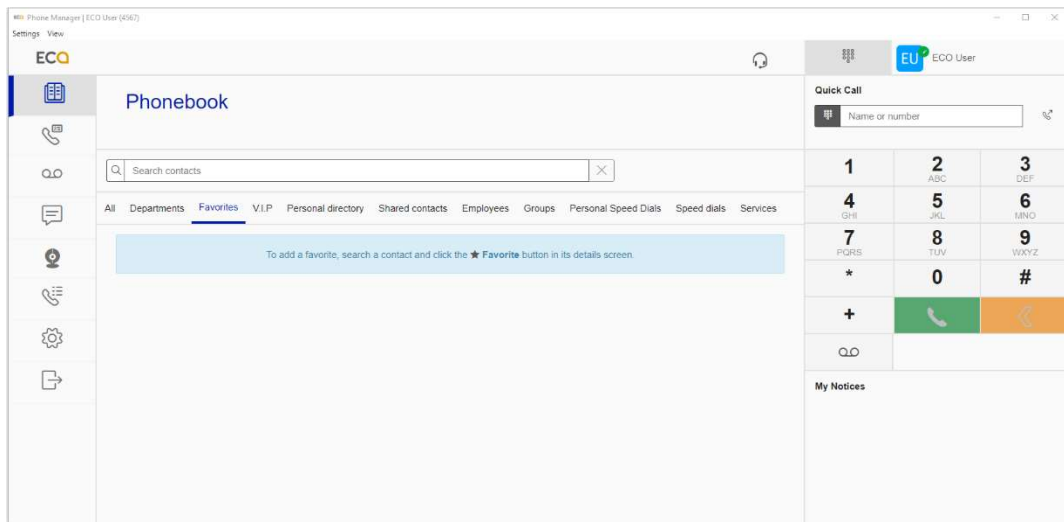
2. Overview

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

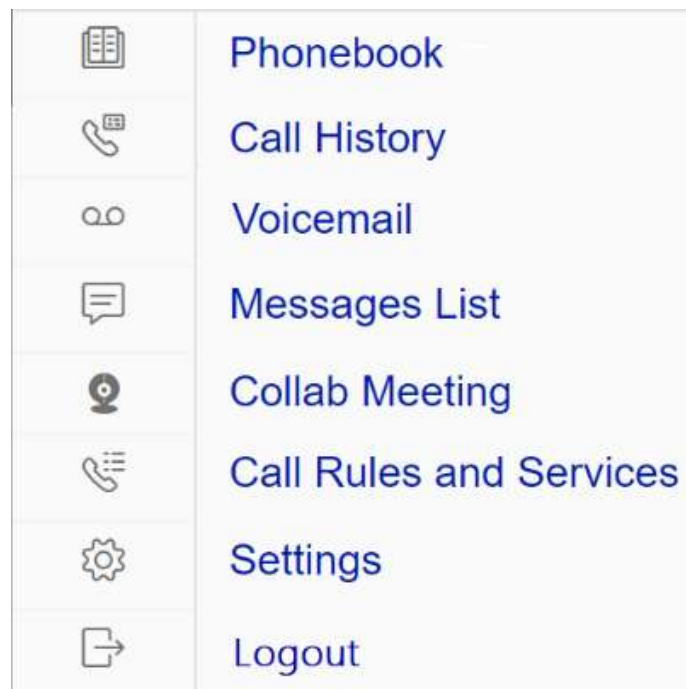## 3.1. Main Screen

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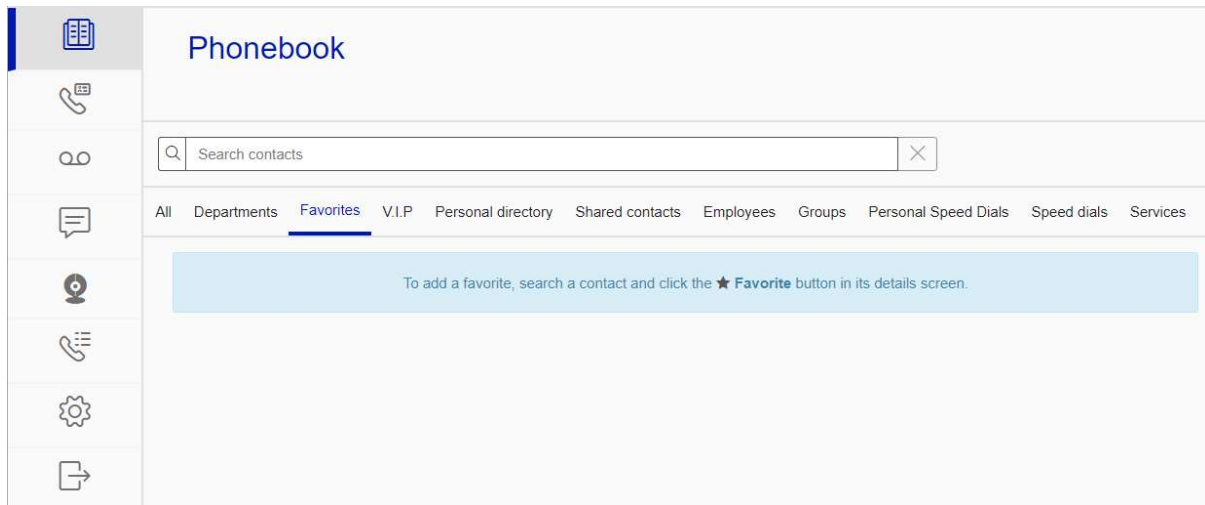
4. Option Panel

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.

Search Bar	The search option allows you to quickly find entries by entering there name of number.
All	This shows every entry within the system.
Department	Shows Users by department.
Favourites	This is the default option when selecting the Phone Book and Users can be selected to be shown for your most used.
V.I.P	If a Users is selected as a "V.I.P", any call to you from this User will override "DND" & "Presence" call forwarding options.
Personal Directory	Allows you to store personal contact numbers.
Shared Contacts	Is the system speed dial directory.
Employees	Is a list of all Users.
Groups	Is a list of all Groups.
Personal Speed Dials	Future Development.
Speed Dials	Future Development.
Services	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
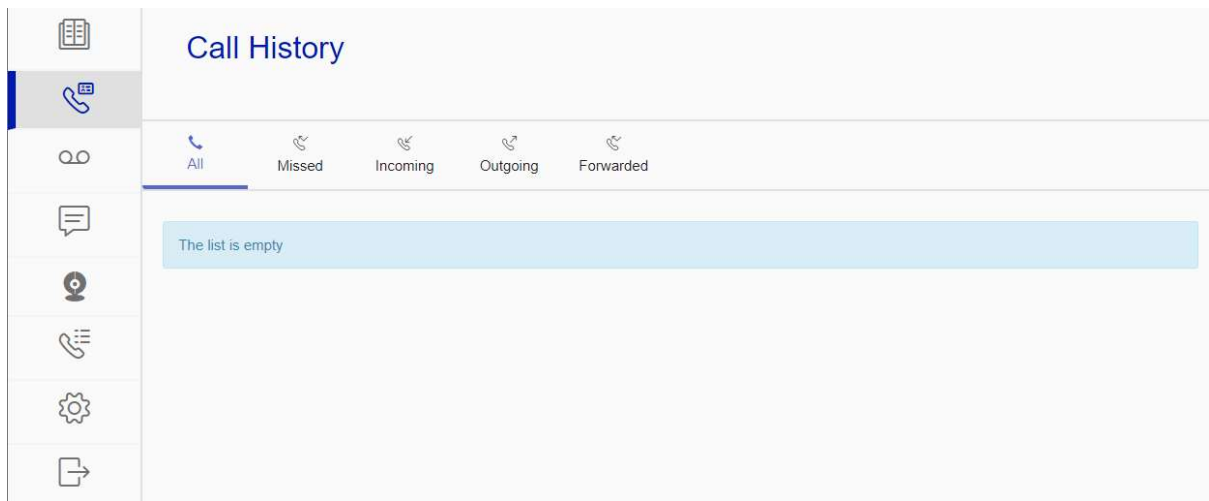
When a call is made, received, missed or forwarded it will be registered in the relevant field.
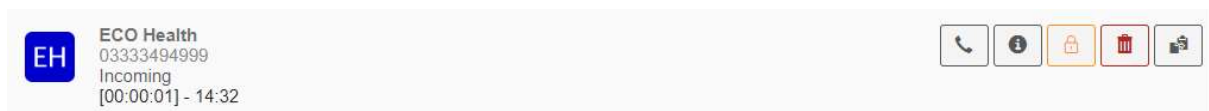
With each entry you will be provided with the following options.

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

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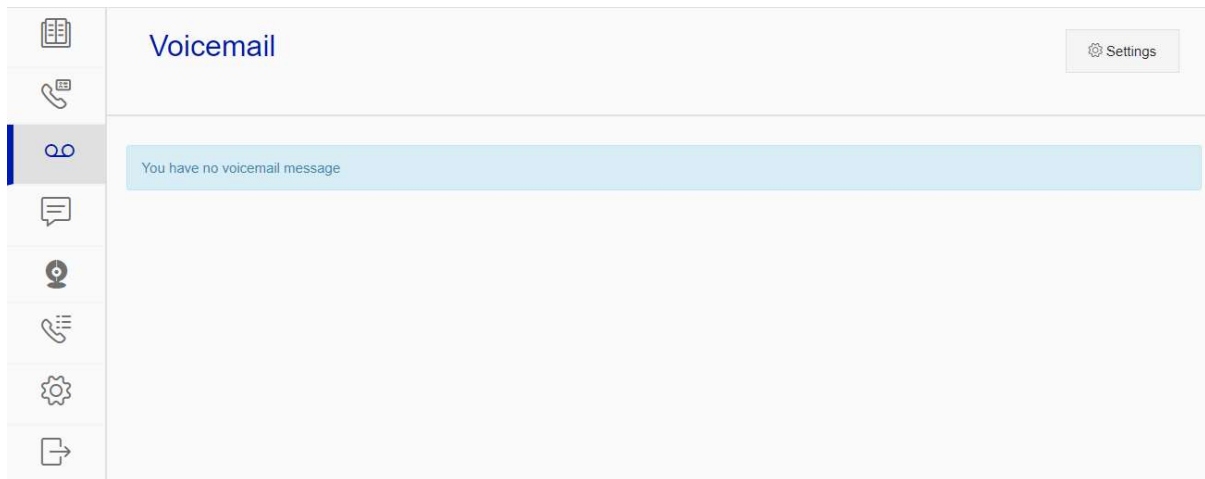
When a new Voicemail is received you will be notified in the left-hand panel with the number of new messages.

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.

📞	Call back
▶	Play
˅	Expand options
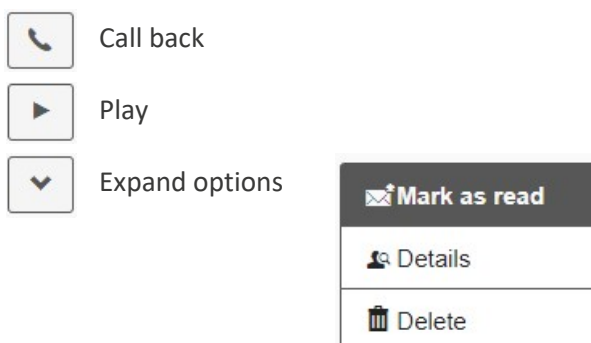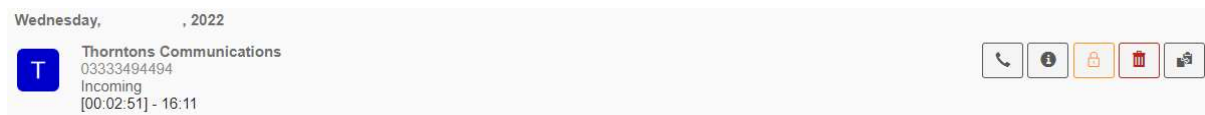
Note: by default, your mailbox can only hold 20 Messages.

⚙ Settings

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.

ℹ 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 attachement, marked as read in voicemail system
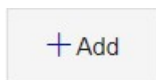By email with attachement, not left in voicemail system

4.4. Messages

From here you can start and manage any direct or group messages.
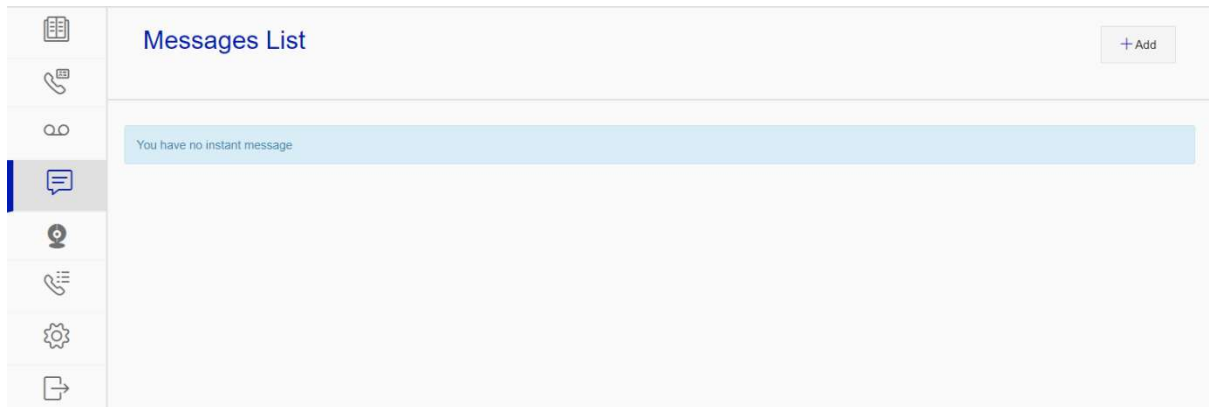
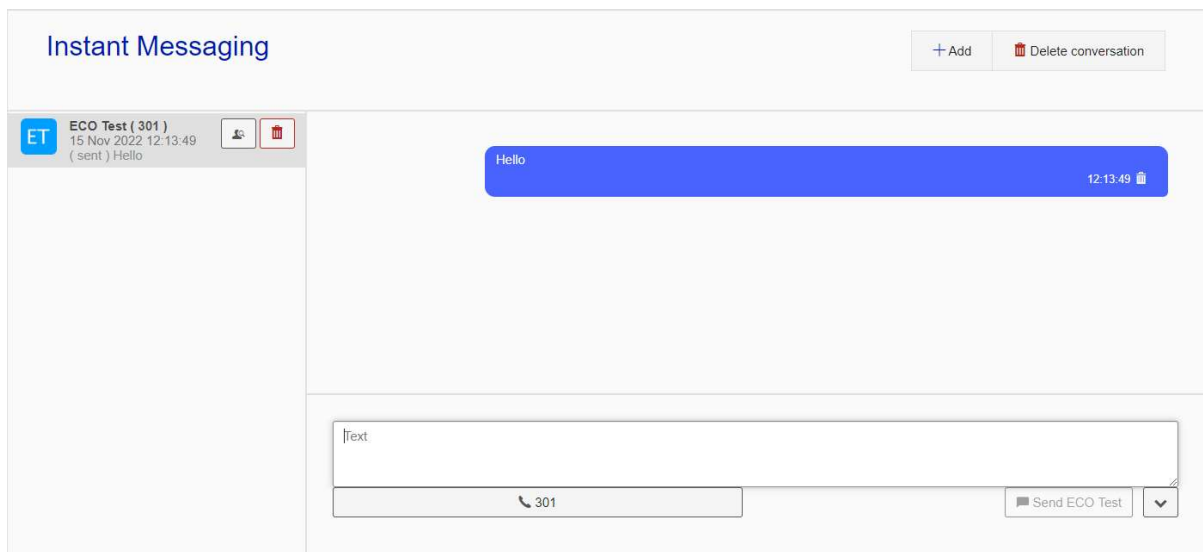To create a new message, click on

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

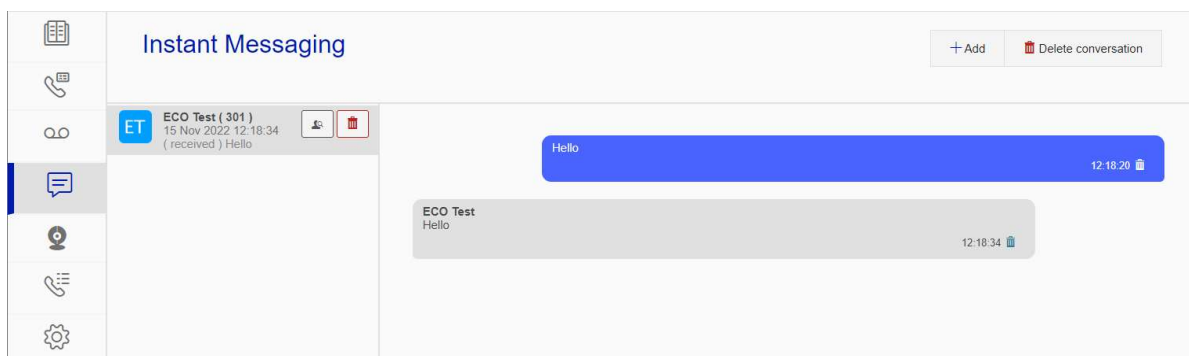Through the drop-down option you can manage how your "Return" key functions.

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

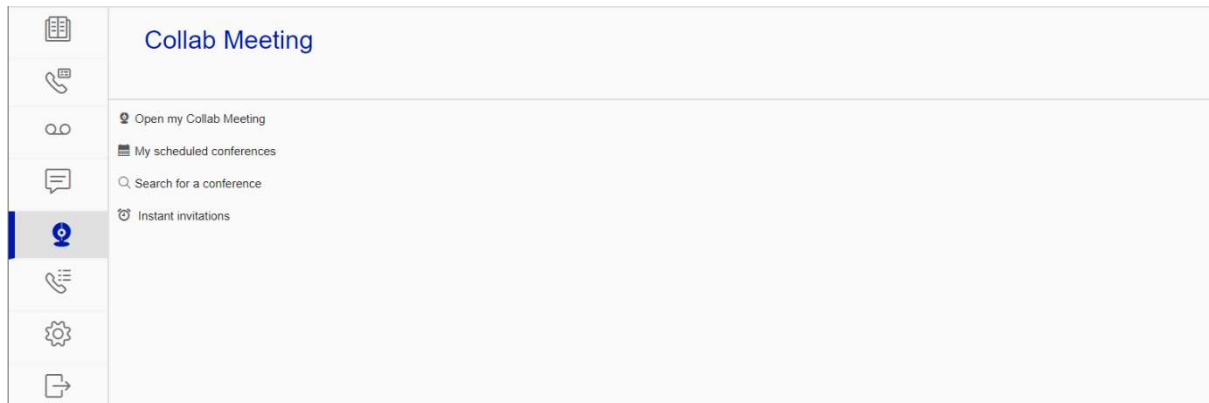When a new message has been received a notification will be presented in the Message tab.
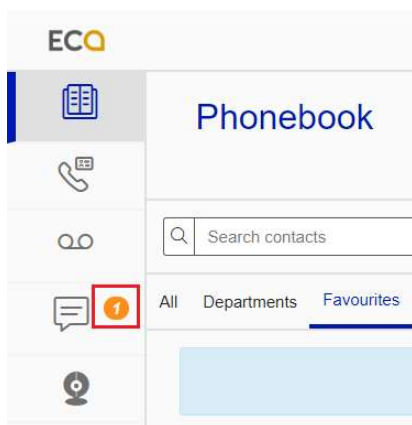
Click on the Message tab and you will see the response.

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
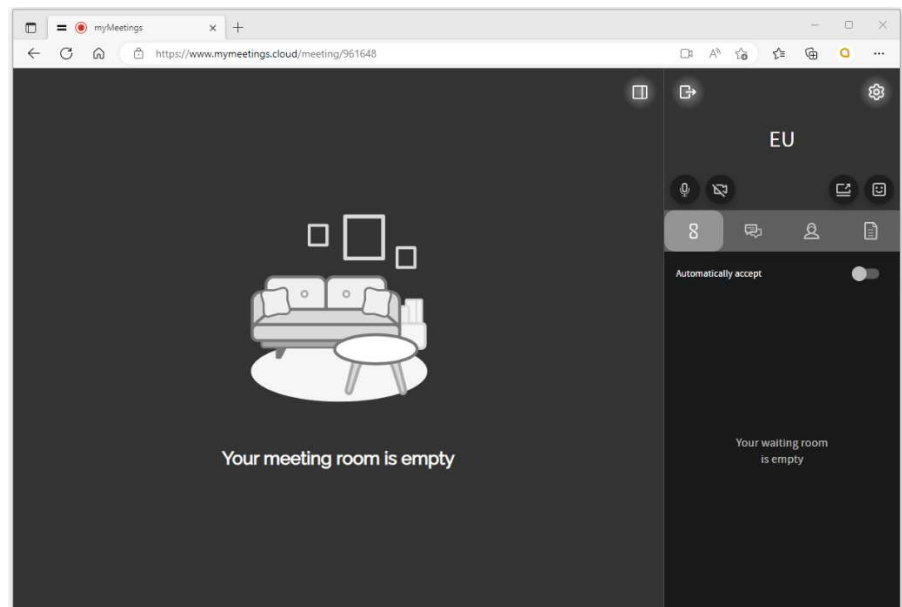
Key:

	Display/hide rightbar		Logout
	Display/hide settings		Enable/disable microphone
	Enable/disable camera		Start/Stop screensharing
	Stickers overview		

Waiting Room – you can automatically accept Users entering your meeting room or accept on an individual basis.
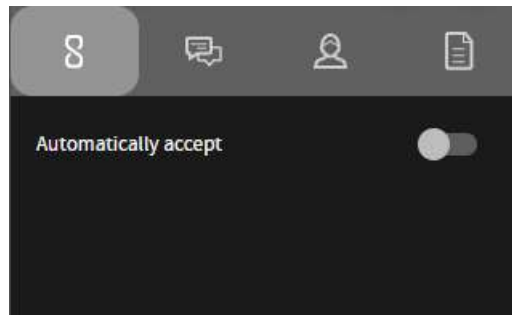
Group Chat – message all parties within the meeting.
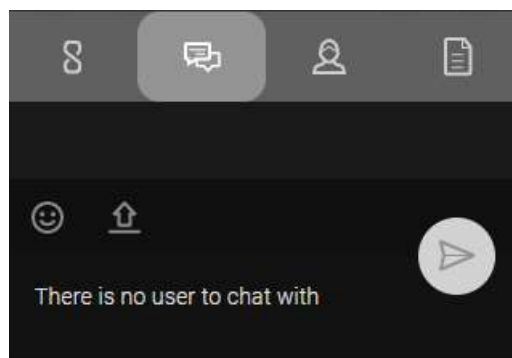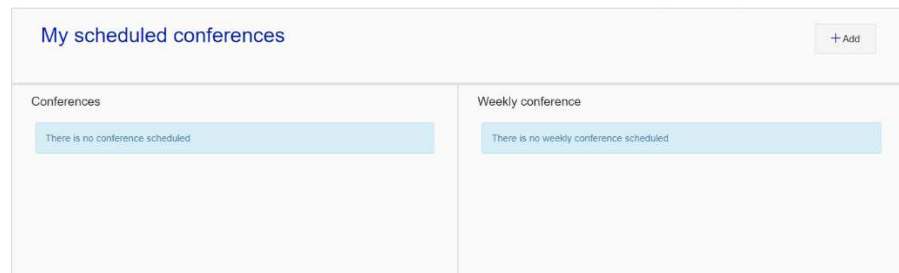
Users – control User settings.
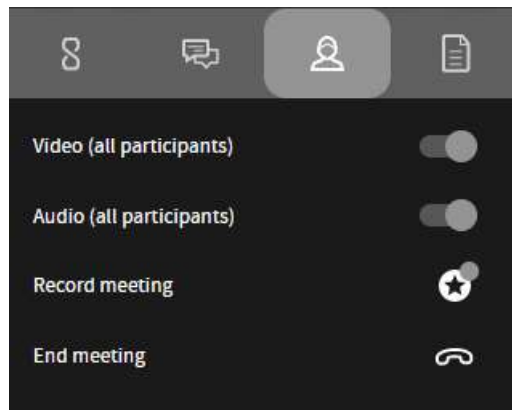
Files – file share documentation with the meeting.
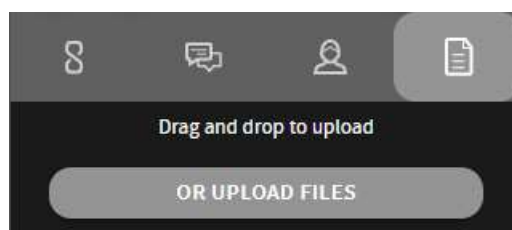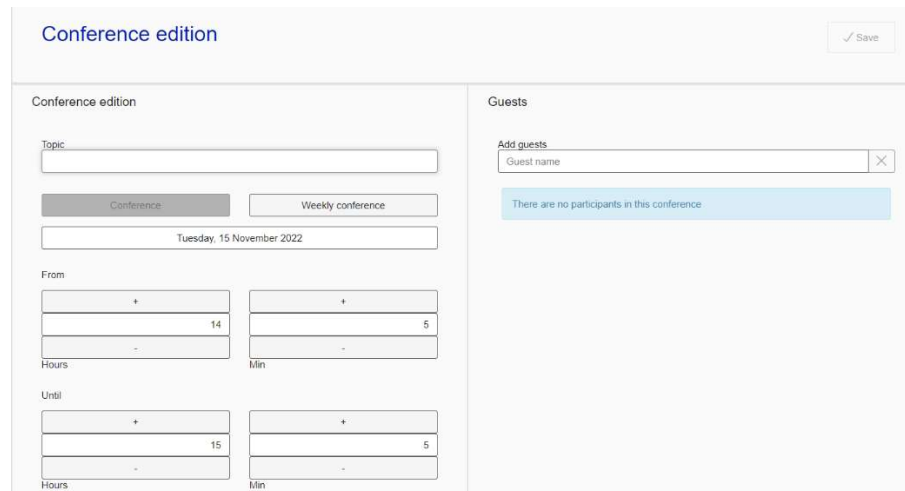
My scheduled conferences Create and displays any scheduled Collaboration meetings

To create a new collab meeting, click on

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

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

Or enter the email address of the participant and click on the + to send.
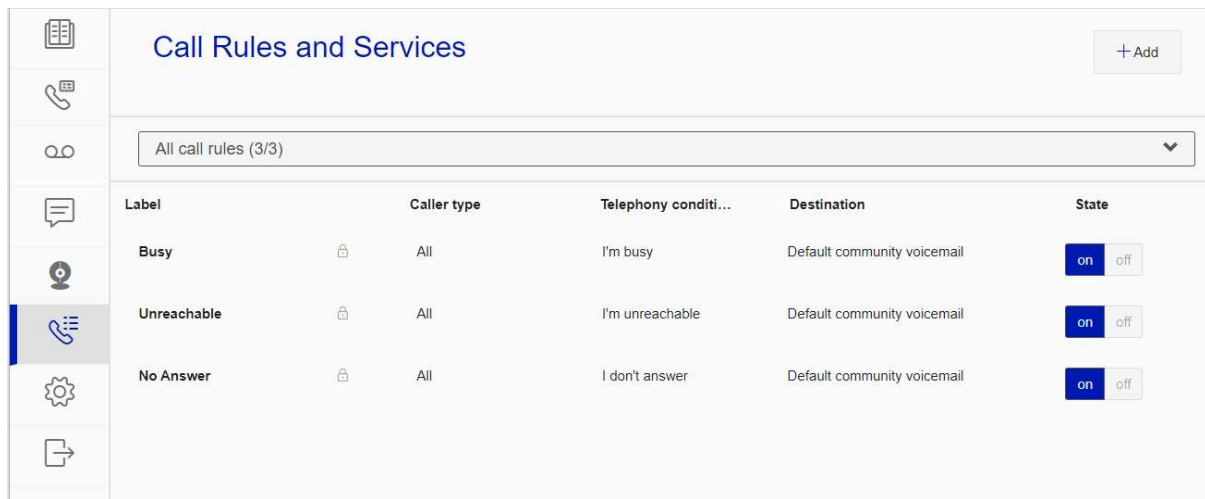
4.6. Call Rules and Services
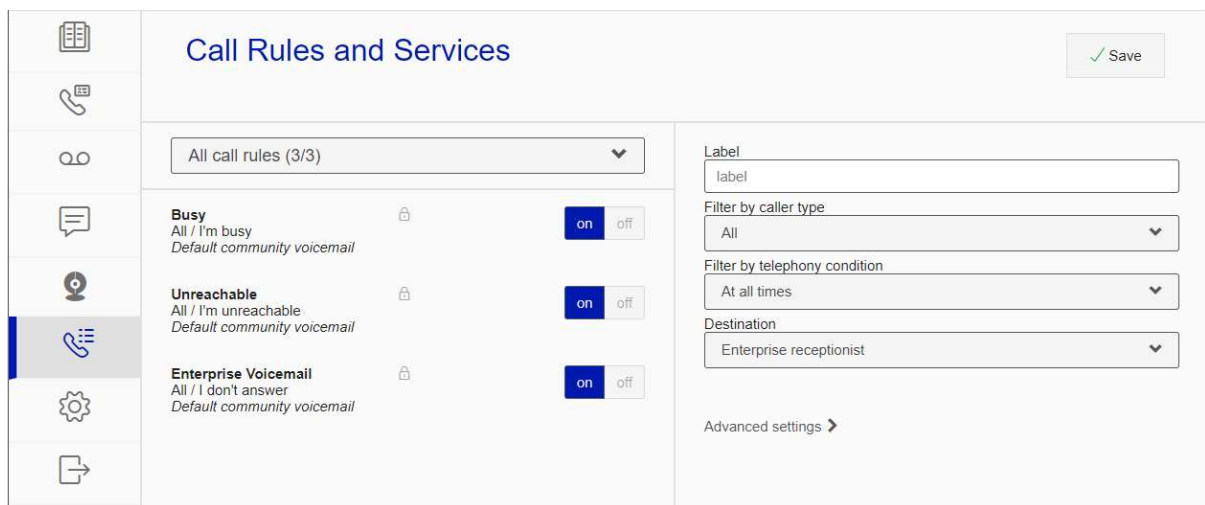
From here you can enable and disable the default calling rules and create your own bespoke settings.

To create a new calling rule, click on

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

Label   Give the rule a name

Filter by caller type

Filter by telephone condition

Destination

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"

Advance Settings

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.

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

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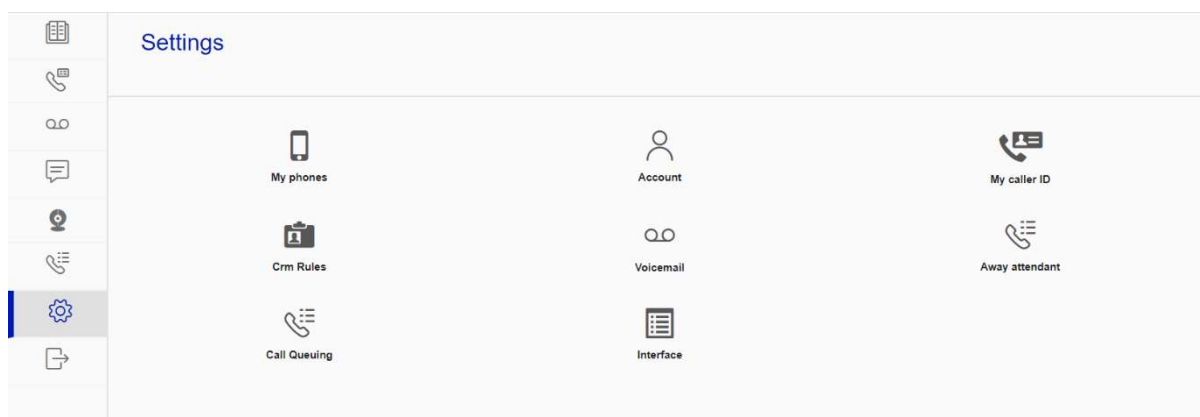
My phone   allows you to see your phone devices, connect/disconnect your Softphone and change your call options.

Account   Here you can update your User settings.

My caller ID   Here you can update your caller settings.

CRM Rules   N/A

Voicemail   (As show previously)

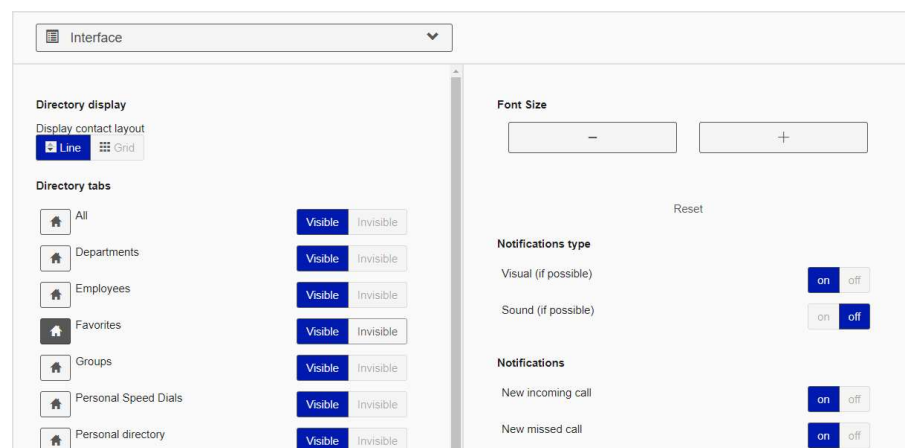**Away attendant**   N/A (Contact Centre only)

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.

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.
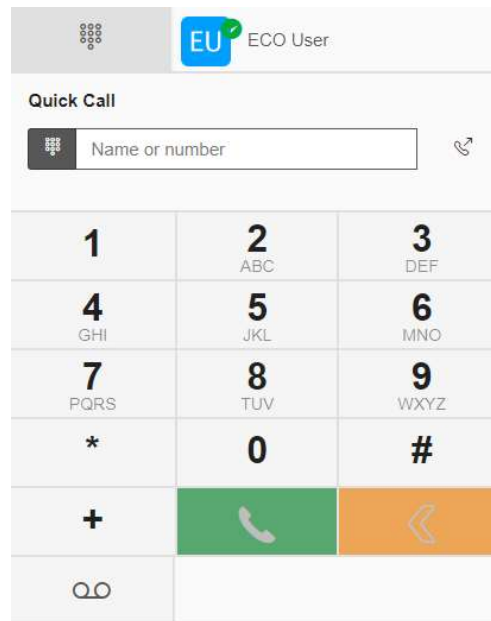
Quick Call

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.
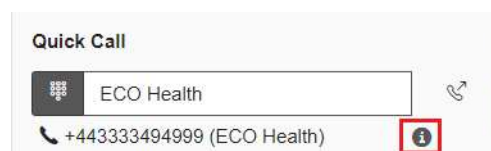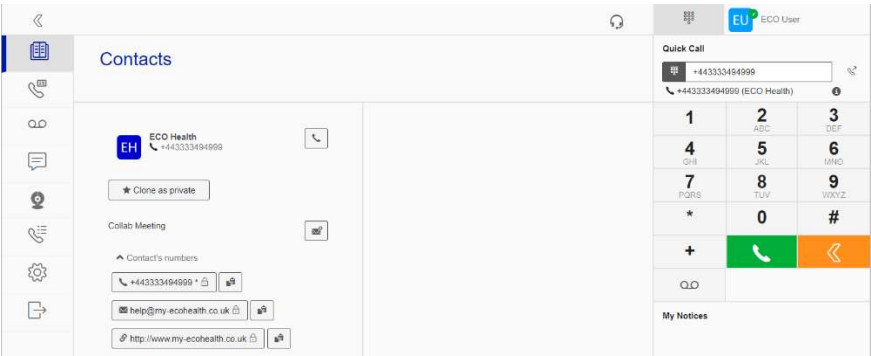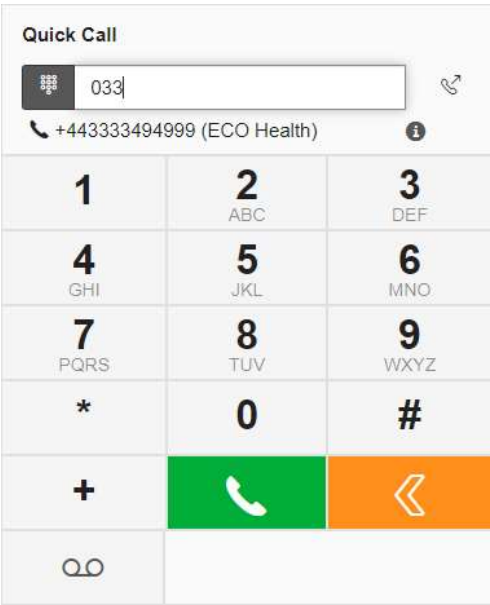

Manual Dial

To dial a number manually simple enter the digits and press the green "Handset" key to start the call.
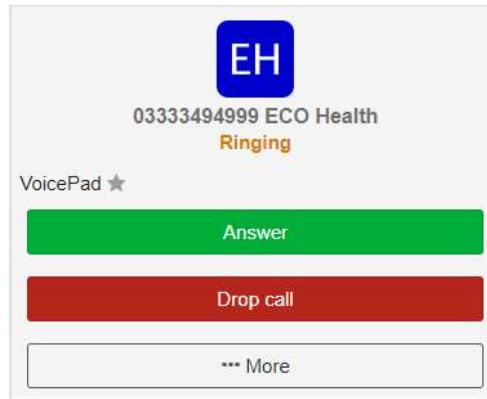
As you enter the digits the system will search and offer options from the contact list.
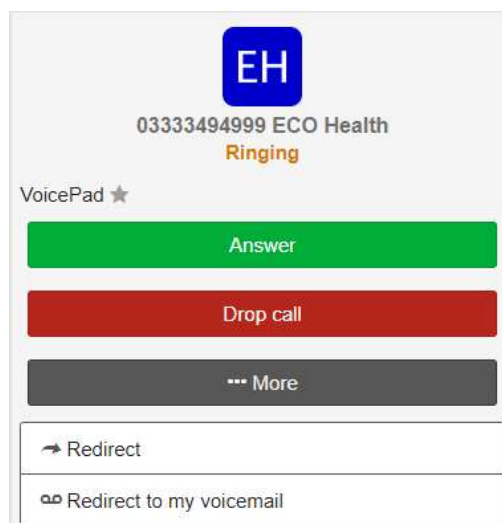
5.2. Incoming Call

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.
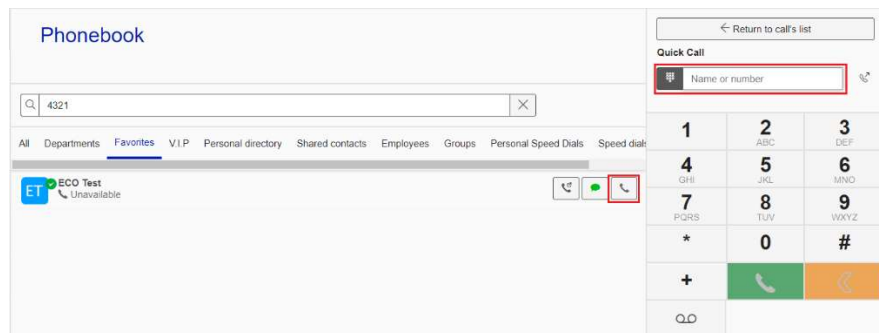

To answer the call simply click on the green "Answer" key.

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

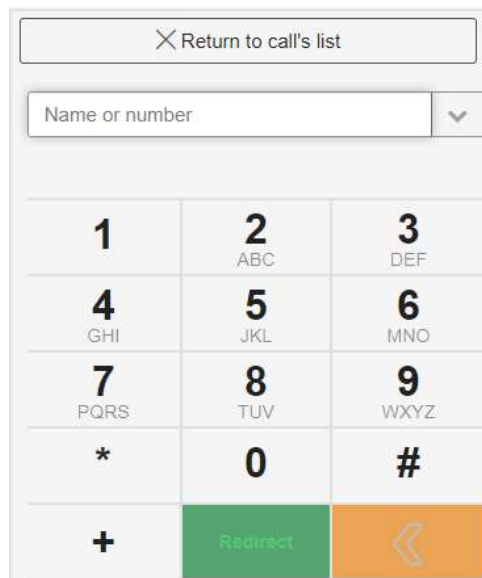**Redirect**   When using "Redirect" you will be presented back the Dial pad. You can either enter the location and press the green "Redirect" Key or simply select the Dial button of a User from the Phonebook.

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.
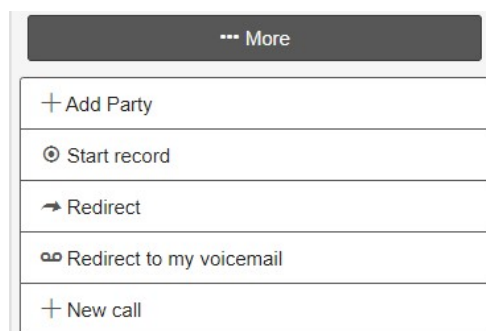
5.3.   In Call Options

Whilst on an active call, you are given the option to place the call on Hold, open the dial paid 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.

Add Party	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.
Start Record	All calls are automatically recorded by default, this option is not applicable.
Redirect	Calls will be transferred directly to the selected party.
Redirect to my VM	sends the call directly to your voicemail box.
New Call	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

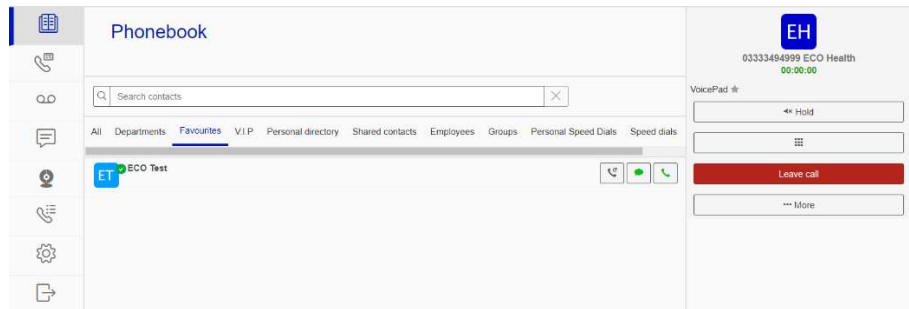**Retrieve Held call**   Select the UnHold key

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] icon for a Supervised transfer or the [icon] icon for an Unsupervised transfer.
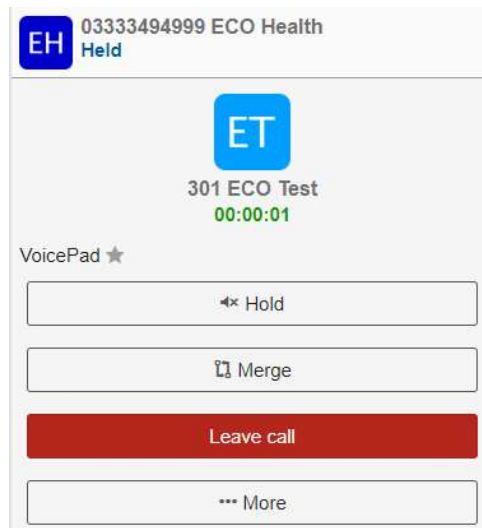

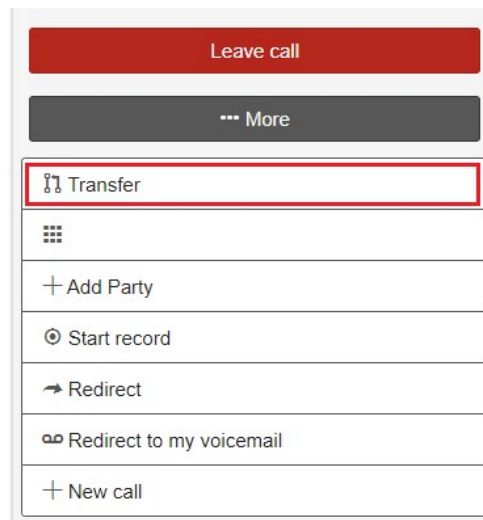[icon] Supervised Transfer (announce the caller)

[icon] Unsupervised Transfer (call is directly pass over)

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

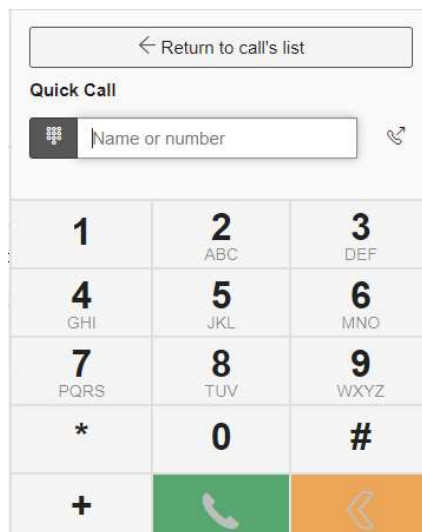To Transfer the call select "More" and select "Transfer"

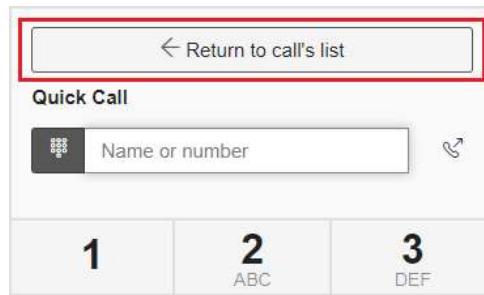The call will be released and transferred.

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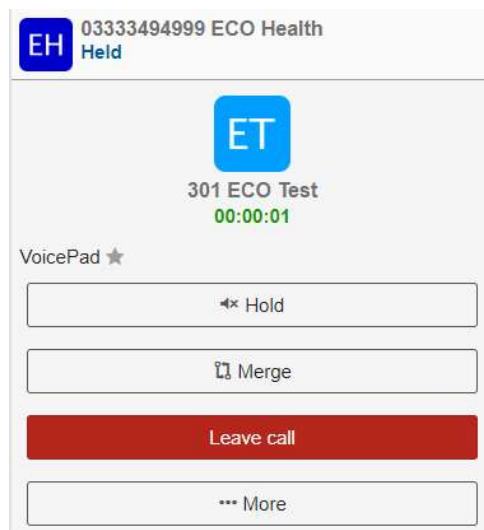

New call - You will be presented back the Dial pad. Simply enter the phone number and press the green Handset button.
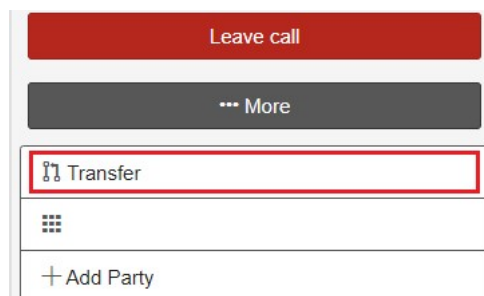
To see both active calls you must press the "Return to calls list" at the top of the dial pad.

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.

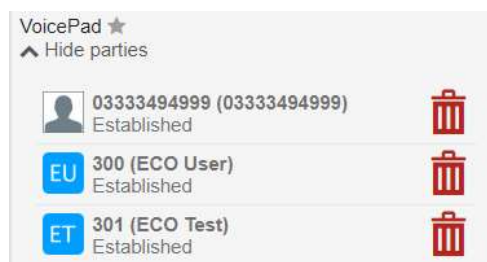## 5.6. Merging a Call (3way Conference)

Follow the same process to as a Supervised Transfer, when the party you wish to join the call has answered simply press the "Merge"
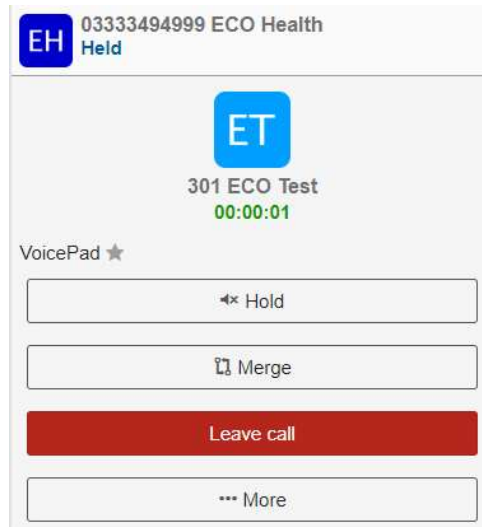
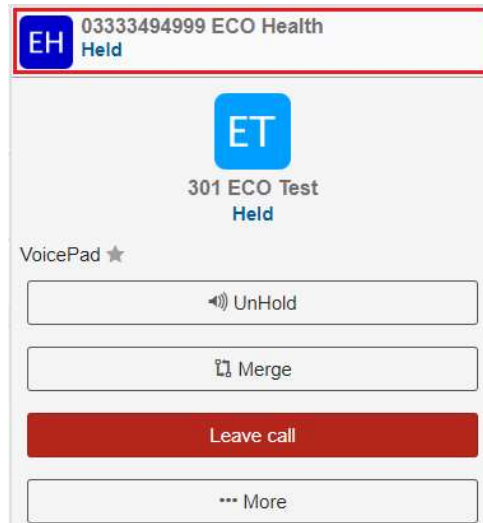By selecting the "Show parties" you can see all callers.

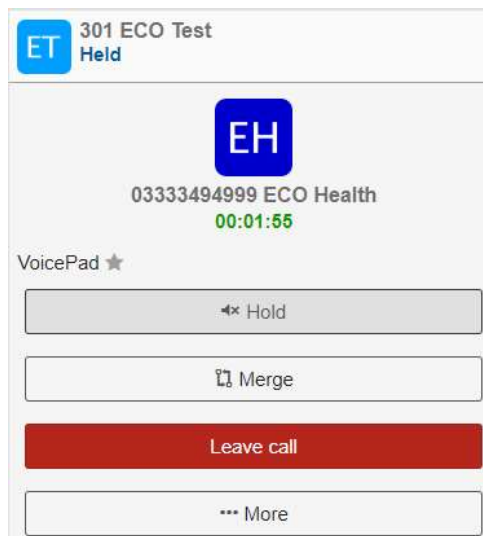You can remover a caller by clicking on their respective bin icon

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. Simple place the active call on Hold and select the original call.
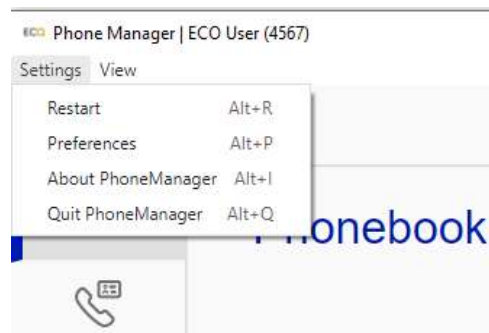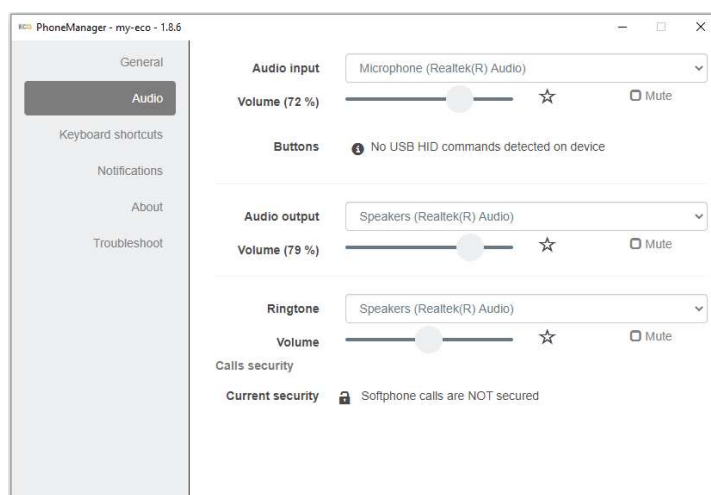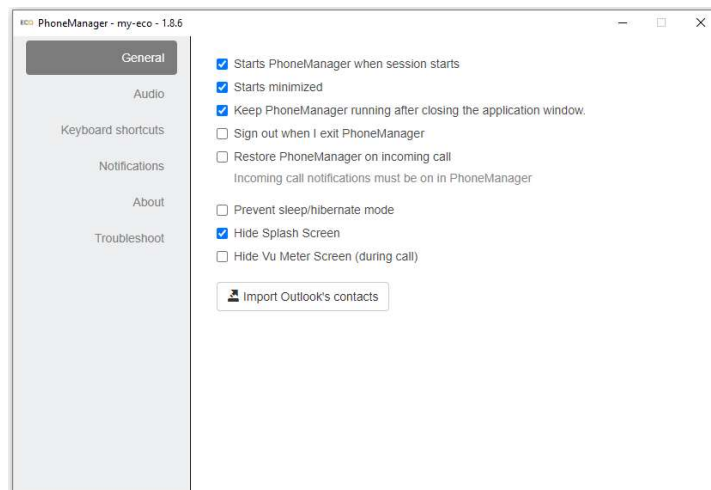

Through this process you can flip between calls.

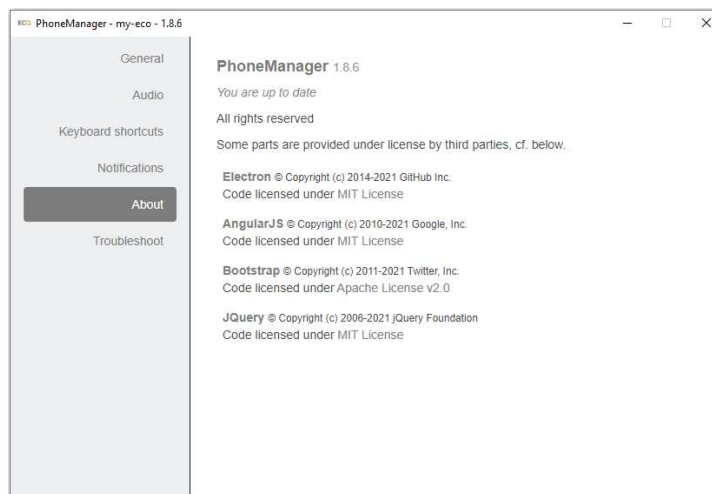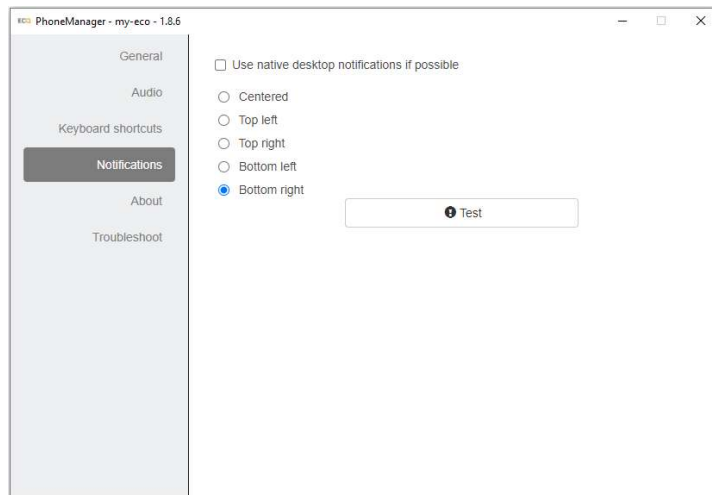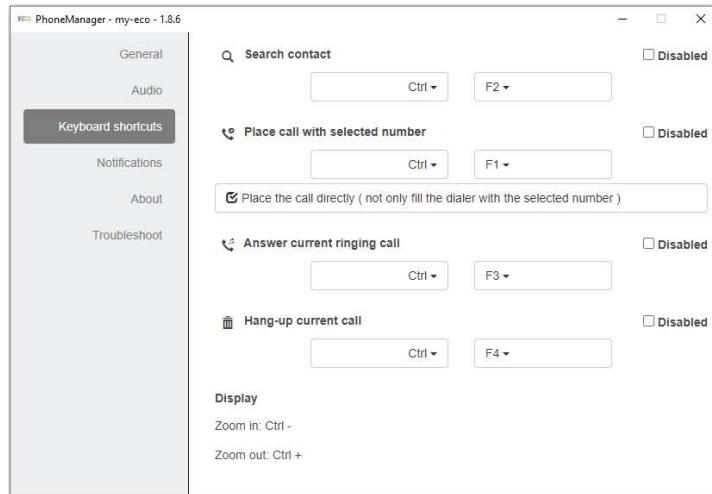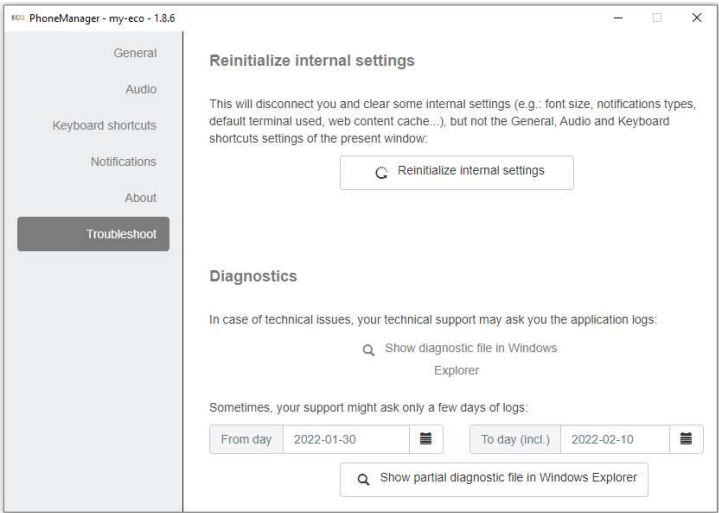# 6. Device Settings

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