Desktop and Plugins from Vonage Business

Installation and User Guide

The Vonage Business Desktop reinvents the way you interact with your phone service, giving you extra control and convenience to manage business communications. Review real-time CRM information, click to call colleagues, and manage your settings – all from your computer's desktop. Desktop from Vonage Business puts everything you need to run your business right at your fingertips.

This guide provides instructions for installing and using the Desktop application.

1-877-862-2562 | business.vonage.com

Table of Contents

VBS201403UGDDESKV01

1-877-862-2562 | business.vonage.com

Overview

The Vonage Business Desktop is a free application that extends the features of our virtual PBX to your desktop, giving you extra control and convenience to manage your business communications.

Desktop Features include:

- Screen pop alerts to incoming calls with Caller ID.

- Intelligent Plugins search for and present real-time information for each call.

- Provides real-time status of coworkers.

- Click-to-Call a coworker from within your company-wide directory.

- Review voicemails.

- Manage live calls: place calls on hold, forward, record calls and end calls.

- Utilize Call Monitoring to listen in, whisper and even join a call with a team member.

- Monitor the real-time status of Call Queues.

- View a list of Conference Bridges for one-click access.

- View and search your Call Log (up to 50 records).

- Make a call.

- Manage all of your PBX settings.

- Manage which coworkers you wish to view in the Directory.

- Add and remove screen-pop Plugins.

1-877-862-2562 | business.vonage.com

Prerequisites

Vonage Business Desktop requires Microsoft Silverlight 4 or higher.
To verify if Silverlight is installed on your computer, go to the Silverlight installation page:
http://www.microsoft.com/getsilverlight/Get-Started/Install/Default.aspx

System Requirements

System requirements for Desktop follow Silverlight:

Browser Support:
IE 9+, Firefox 3.6+, Safari 4+, Chrome 12+

Windows Compatibility:
Windows 8, Windows Vista, Windows XP Service Pack 2
X86 or x64 (64-bit mode support for IE only)
1.6-gigahertz (GHz) or higher processor with 512-MB of RAM

Mac Compatibility:
OSX 10.4.11+ (Intel-based)
Intel Core Duo 1.83-gigahertz (GHz) or higher processor with 512-MB of RAM

1-877-862-2562 | business.vonage.com

Installation

To install Desktop, go to http://business.vonage.com/features/desktop

One-click Installation

When the page loads, click the "Install Now" button to install the application. Once installation is complete, the application will place the Desktop icon on the Windows desktop or in the Mac "Downloads" folder. Mac users can then place the download in their "Applications" folders.

Click **Install Now** to install Desktop.

Common Issues

Application is Already Installed
The installer button will recognize if you already have the application running on your machine.

Please Install Silverlight
If you do not have Microsoft Silverlight installed, you will be unable to download Desktop.

Click **Click now to install** to install Silverlight.

Error Message
"This username is not yet assigned to an extension." User credentials must be associated with an unlimited or metered extension to use Desktop.

Running Desktop

Windows Users
The application will automatically run after it has been successfully installed. Desktop can also be opened by clicking the Desktop icon or by clicking "Start," "All Programs," and then "Desktop."

Mac Users
Mac users will need to place the application in the appropriate folder (e.g., the "Applications" folder). Desktop can then be placed in the dock or on the computer's desktop and then launched from there.
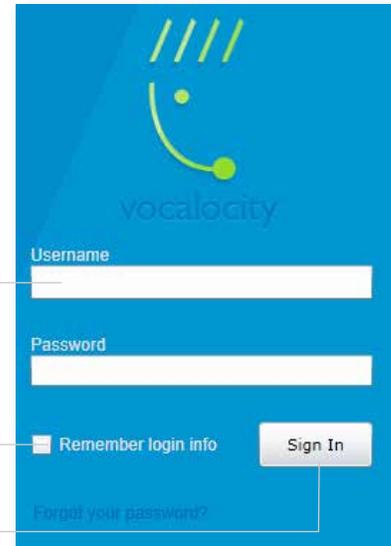
5

1-877-862-2562 | business.vonage.com

Signing In

Upon launching Desktop, you will be prompted to sign in. Enter your username and password

Enter your **Username** and **Password**.
NOTE: The username must have at least one extension assigned to them in order for the application to perform correctly.

Click the checkbox to save your credentials.

Click **Sign In**.

Desktop Features

Title Bar

Status Icon

The status icon shows your availability. Expanding the menu by clicking the arrow lets you manage your status by toggling between "Available" to answer calls and "Do Not Disturb" to send calls direct to voicemail

Multiple Extensions

If you use multiple extensions, the title bar will show the default extension that is used for Caller ID. When clicking the status arrow, you can manage the availability status of each extension.
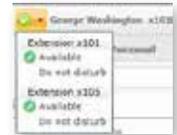
Plugins

Clicking the Plugins icon opens the Settings page to the Plugins management area. Install and Unstall screen-pop Plugins here.

Help

Clicking the Help icon opens a browser window to the Support Portal.

Settings

Clicking the Settings icon opens the Settings window. Manage your answering rules, device settings, directory view and more.
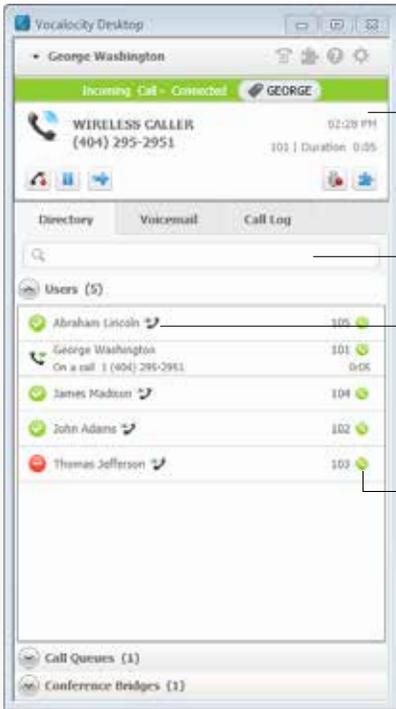
Call

Clicking the Call icon will open the Dialer. Here, you can make a call by typing in a number or choosing a number from a list of recently called numbers.

1-877-862-2562 | business.vonage.com

Directory

The default view, and the first tab of Vonage Desktop, is the Directory. View presence and call colleagues, join Conference Bridges and use the arrows to expand each directory to view extensions.

Live Phone Call

An active call will show the number, time, call duration, extension and prompts including forwarding the call, placing the call on hold and **On Demand Recording**.

Search by the number or name.

Click the telephone icon to monitor the extension. The icon will only appear next to users you can monitor.

Click the green phone icon to instantly call the extension.

Monitoring your Users

Make a call by clicking the Call icon at the top, type in a phone number, use the dial pad, or use the drop down to call a previously used number.

Click the down arrow to expand each directory section.

View the real-time call presence of your colleagues

Keep track of your call queues and hold time.

One click access to enter a conference bridge.

Expanded Directory View

Drag the right side of the Desktop to enlarge the Directory and view more employees at once.
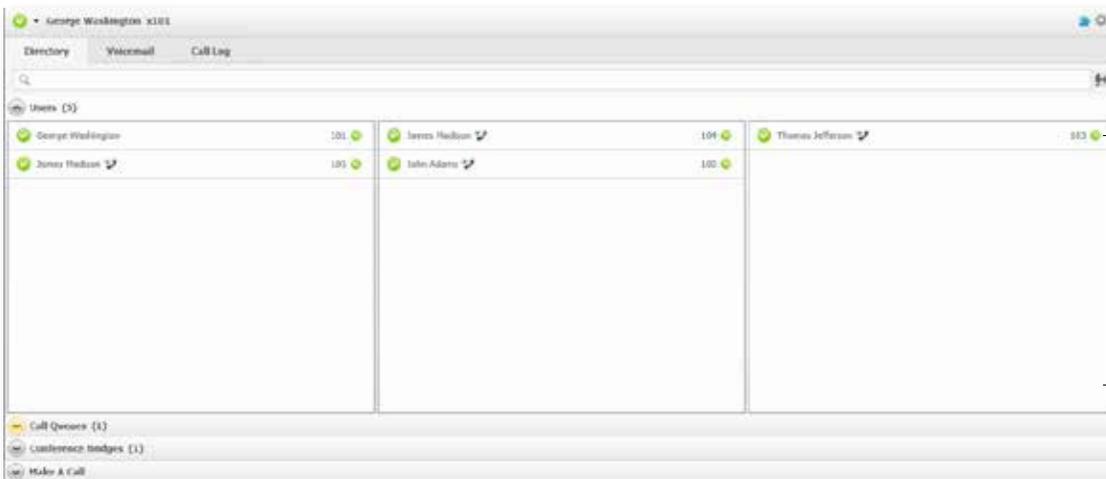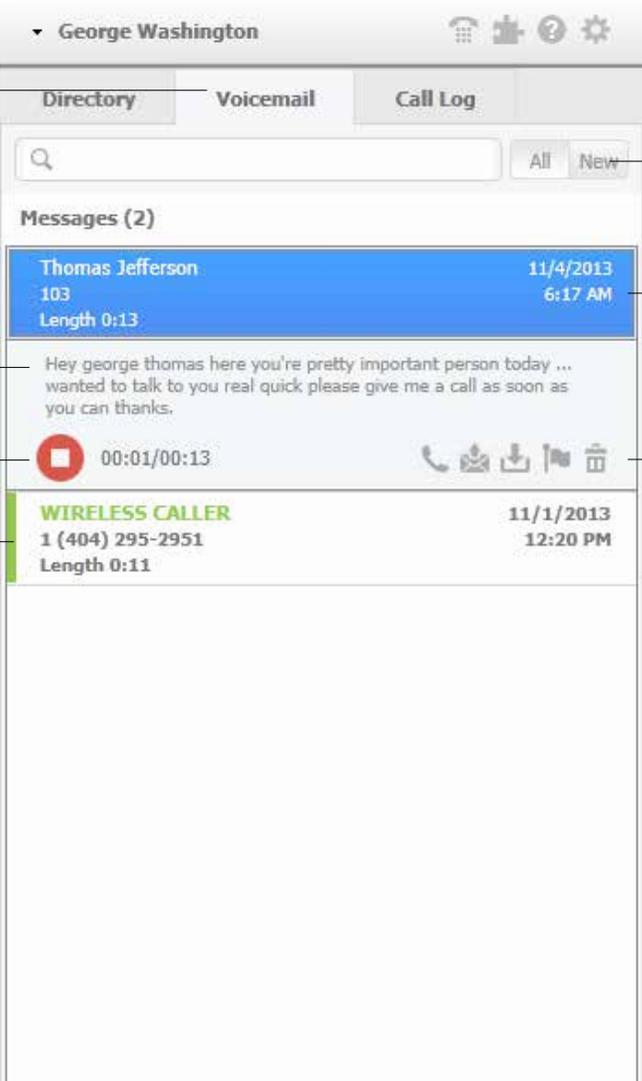

View your Directory list in ascending order or arrange from left to right.

Easily Click to Call an employee from the Directory.

Click and drag the edge of the desktop to expand the window.

1-877-862-2562 | business.vonage.com

Voicemail

Here you can view, listen, download, and keep track of new and previously played voicemails.

Click the **Voicemail** tab to view your voicemails.

Switch between **All** or **New** messages.

Click on voicemail to expand the selection and access play functions.

Voicemail Transcription will be visible if it is an active feature on the account.

Play

Stop

Green messages are new, unplayed voicemails.

Return Call

Download

Mark as New

Delete

Send Mail

1-877-862-2562 | business.vonage.com

Call Log

The Call Log displays all incoming and outgoing calls, ordered with the newest call on top. You can scroll through, return calls with a click, listen to voicemail or review Plugin search results. The Call Log presents the last 50 calls . To view an expanded call log that is greater than the 50 call limit, login to the portal and view your reports.

View incoming and outgoing call history.

Intra PBX

Outbound

Inbound

Missed

Switch between **All** and **Missed** call views.

Click to view Plugin search results.

Click the green phone icon to call a number back.

Call Recording

If a call has been recorded there will be a microphone icon next to the call log. "Play" will play all recordings in sequence. Click a number to listen to the individual segment. Download will export all recording segments as one file.

Play, pause or stop recordings.

Click the microphone icon to view recording play options.

Download or delete recordings.

1-877-862-2562 | business.vonage.com

Settings

Click the Settings button to display User Settings and Plugins. This section is an abbreviated version of the Web User Portal at my.vonagebusiness.com. Any settings saved within the Desktop will be reflected within the online portal.
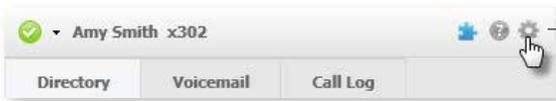
Click the settings icon to view and manage your call settings and Plugins.

Profile Settings

The **Profile Settings** page is the default first page after clicking settings. Here you can change your password and username as well as email and name.

Add a personal number to show up in the list of numbers you would like to forward a call to.

Click **Save Settings** when you are done editing or updating any information you would like to save.

1-877-862-2562 | business.vonage.com

Desktop Settings

Caller ID Screen Pop
The app defaults to display the screen pop for both inbound and outbound calls. Unchecking both boxes means that the screen pop will not display upon call ring or answer

Search your **Directory** list by name or extension.

At the **Desktop Settings** page you can choose which extensions to view in your **Directory.**

After making your selections, click Save Settings. The desktop **Directory** will immediately present your changes.

Enable Caller ID Toaster Notifications
Here you can choose to display small, caller ID "toaster" notifications. These alerts briefly appear in the bottom right corner of your computer screen to alert you to an incoming call and present the caller ID for the caller. Default for these notifications is 'off', but most users who choose to disable the screen pop choose to display toaster notifications.

Please Note:

New employees added to your company directory after your view is customized will not automatically appear in your Directory list. Go back to Settings to add new employees.

Account Admin can use HDAP's Dashboard Settings to define which employees display in Desktop's Company Directory tab (Visible) and which employees display Caller ID.

Extension Details

Change **Call Continuity** settings, configure **7-digit dialing** rules and view other extension details.

Never Miss a Call

Choose your **Never Miss a Call Settings** for times you are away from the office.

1-877-862-2562 | business.vonage.com

Voicemail

Edit **Mailbox Settings** such as PIN and the email address to receive notifications.

Edit or upload voicemail greetings.

Change options for **Exiting Voicemail**.

Please note: if this is active, remember to change your voicemail greeting to remind callers of this option.

Devices

Register up to 3 devices by filling in the correct information for each phone.

Delete a device listed by clicking the "X" icon.

Add a device by clicking the green "+" icon.
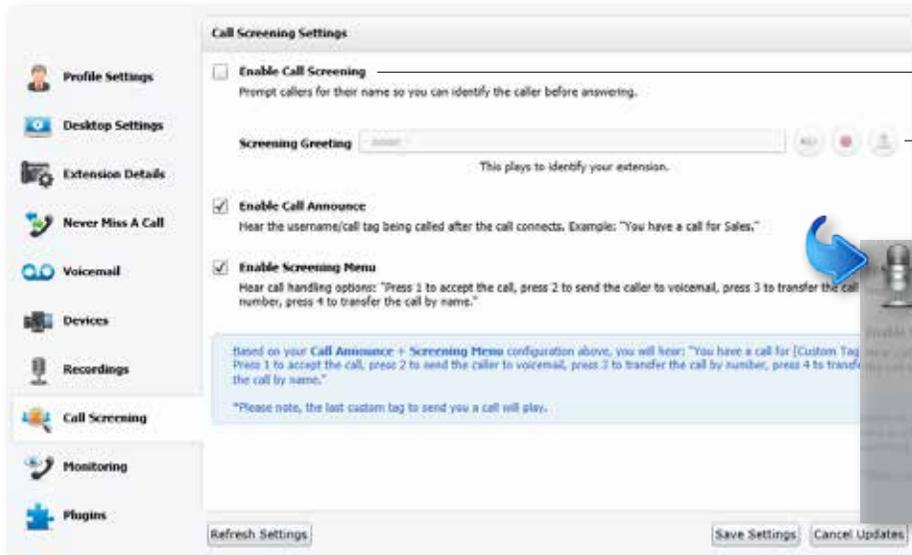
1-877-862-2562 | business.vonage.com

Recordings

Check the box next to **Record All Calls** to make sure all calls are recorded without needing to press buttons on your phone.

This page will only display if **On Demand Call Recording** is enabled for the user.
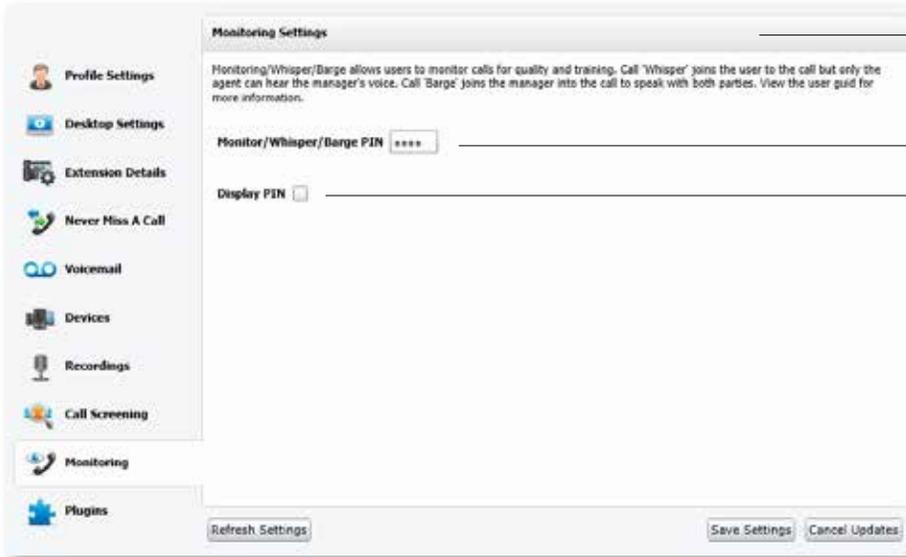
Call Screening

Enable **Call Screening** and choose the prompt you would like your callers to hear.

Choose to record or upload your screening greeting.

When recording a **Call Screening** greeting, a new window will initiate the recording process.

1-877-862-2562 | business.vonage.com

Monitoring

This page will only display if **Call Monitoring** is enabled for the user.

View the PIN used when securely activating monitoring on an extension.

Click **Display PIN** if you would like to view the PIN's digits or un-check the box to hide them.

Plugins

With each inbound and outbound call, Desktop presents a "screen pop" that collects, manages and presents real-time information about the person calling. Each user has the ability to install and remove additional Caller ID "Plugins" that add additional intelligence. The Plugins use Caller ID data to search for relevant information about the caller. Can't find a Plugin? Premium Plugins must be purchased by an account administrator and added to the account in order for users to install them.
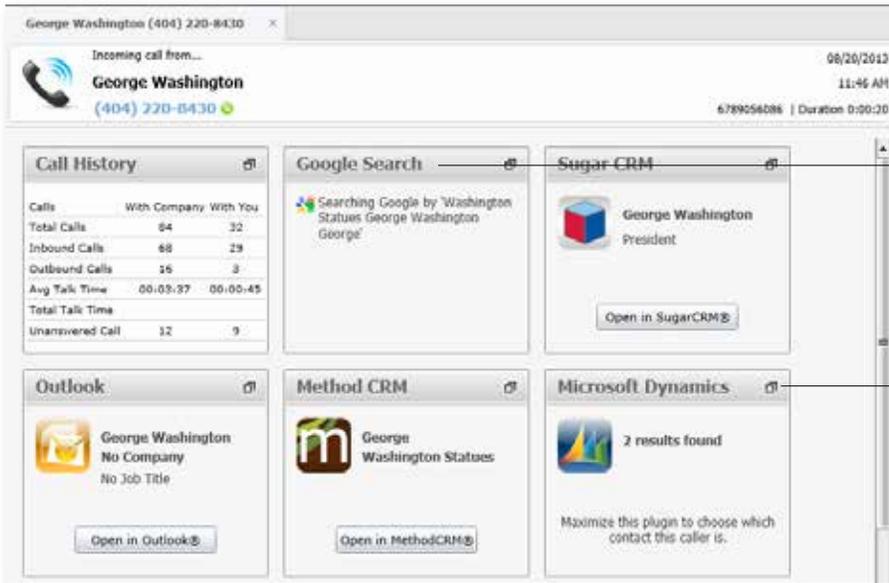

Click **Install** to install a new Plugin.

Click **Uninstall** to remove the Plugin.

Click **Edit Settings** to access a Plugin's unique settings.

Check the **Default Plugin** box to open one Plugin in the maximized state.

Click **Refresh Plugins** to load newly added Plugins to your account.
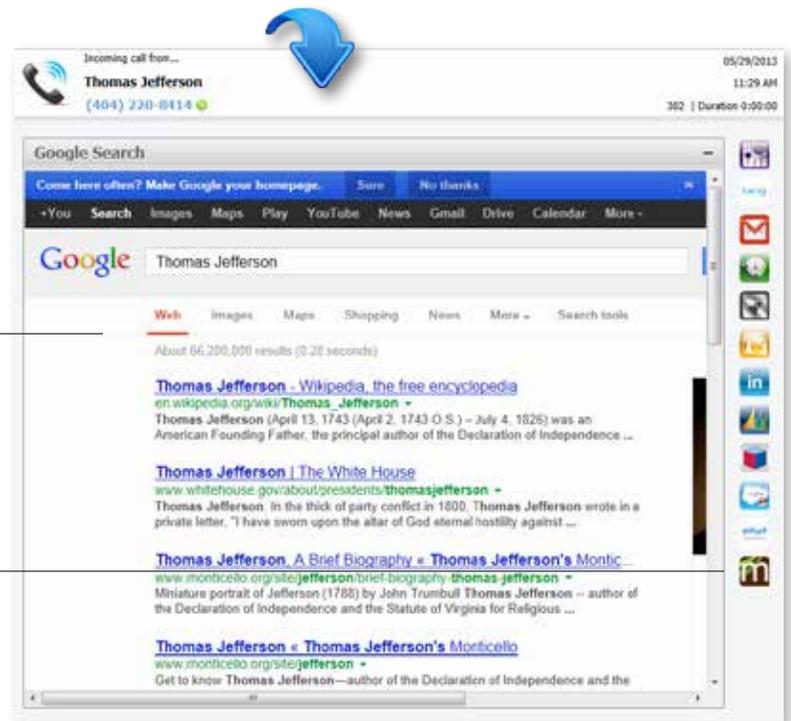
15

VBS201403UGDDESKV01

Caller ID Screen Pop

View the caller name, phone number, time, date, and duration of the call.

Plugin search results are presented in the center panel.

Click to maximize the Plugin window to view detailed search results.

When maximized, the Plugin will expand within the center panel. All other Plugins are listed on the right side of the window.

If you have selected a Default Plugin, that Plugin will always present in this format.

Clicking on a minimized Plugin will replace the Plugin in the center panel.

16

1-877-862-2562 | business.vonage.com

Caller Location Plugin

Caller Location is a free Plugin automatically installed with Desktop. Caller Location presents a map based on the area code of the incoming or outgoing number. The local time and weather, for the current and next day, will also show.
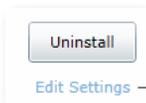
Settings and Uninstall

Click the puzzle piece icon in the upper right-hand corner of the Desktop screen to access Plugin settings.
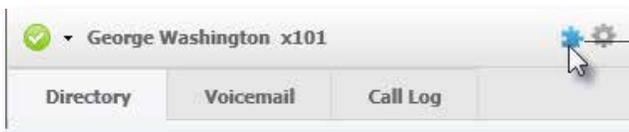
Click the Plugins icon to open the Settings window.

In "Edit Settings," to the checkbox next to "Map Calls" must be selected for the Plugin to present information.
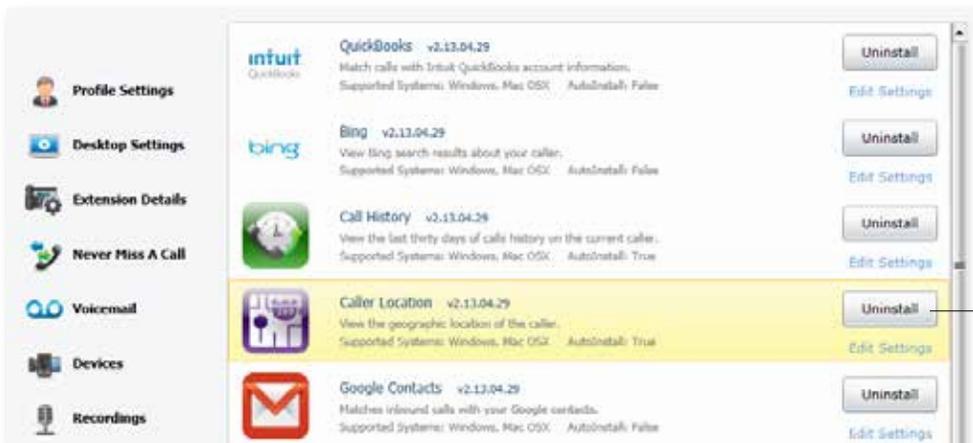

Click **Edit Settings.**

Click **Apply** after clicking the check box next to **Map Calls.**

To uninstall the Plugin click "Uninstall."

Click **Uninstall** to remove the Plugin from the screen pop.

1-877-862-2562 | business.vonage.com

Using the Plugin

With each call, the Caller Location Plugin will present the geographical location, weather and basic caller ID information. The map will display the location based on the area code of the phone number and not the caller's name.
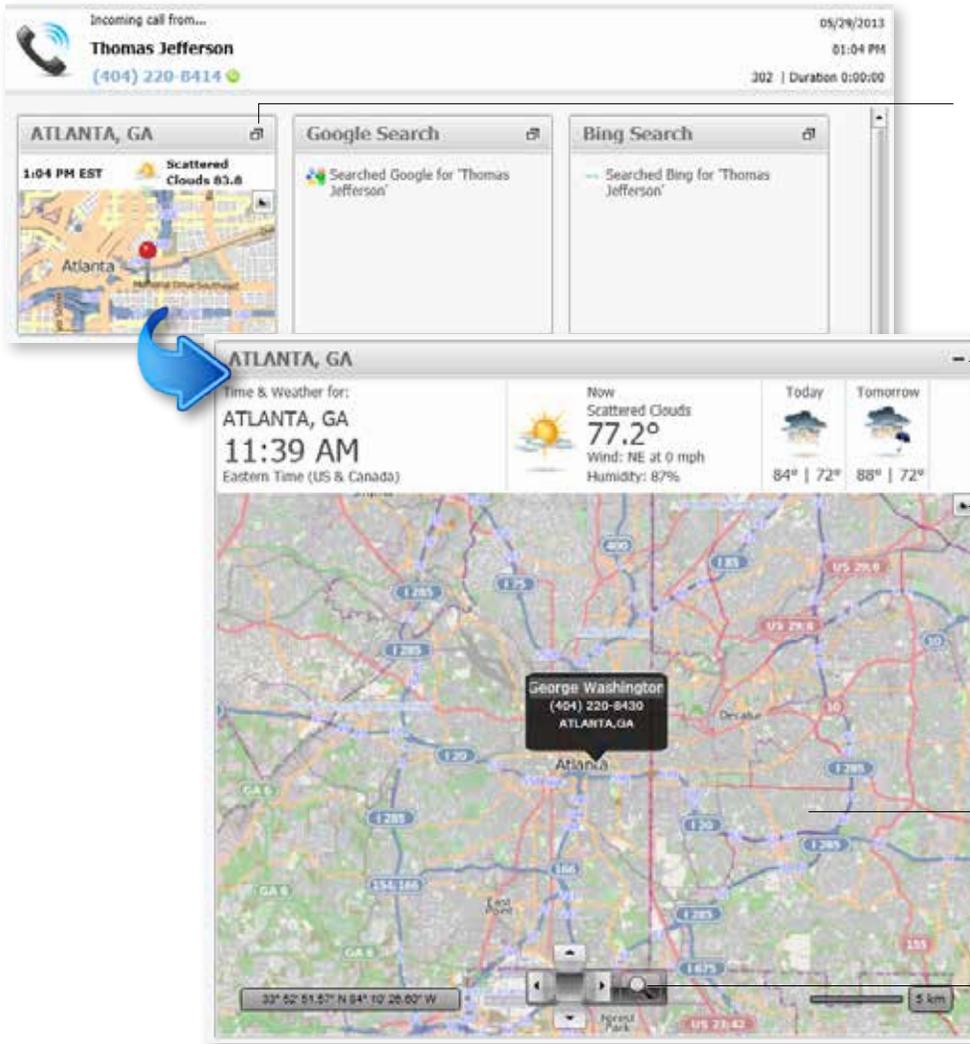
Click to maximize the Plugin and view a larger geographical map.

Once the page is maximized you can minimize the view.

Click the black arrow to see a smaller aerial view.

Manually zoom in by double clicking on the map.Zoom out by holding down the Shift key and double clicking on the map. To move around the map, click inside the map, while not letting go and moving your cursor.

Zoom in and move the map left, right, up and down.

1-877-862-2562 | business.vonage.com

Call History

The Call History Plugin is automatically installed with the Desktop application. This Plugin presents previous calls with the Caller ID. See how many times the caller has called you or others in the company reminding you of previous calls or voicemails that require follow-up.
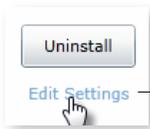
Settings and Uninstall

Click the "Plugin" icon in the upper right corner of the main Desktop screen. This will take you to the Plugins page in settings.
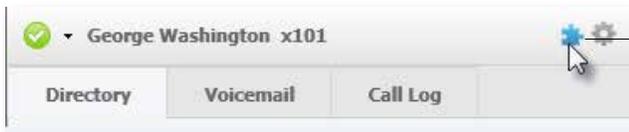
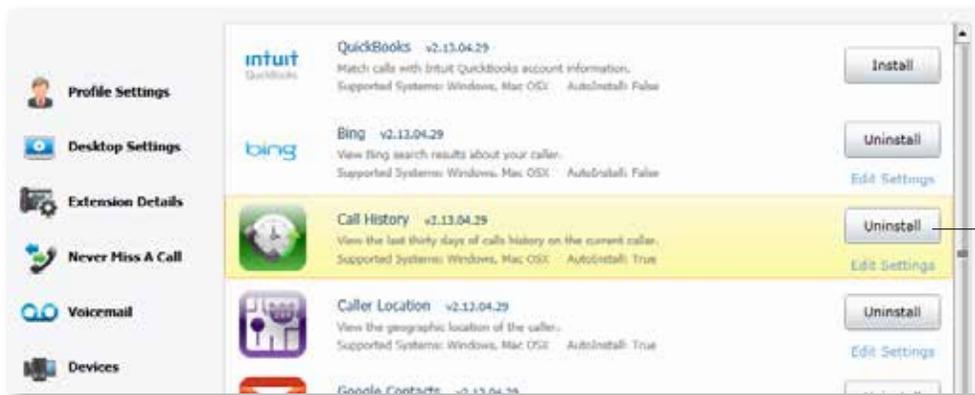Click the Plugins icon to open the Settings window.

Setting options include a choice of presenting Call History for inbound or outbound calls. To change the setting to hide calls for either option, uncheck the box and click "Apply."

Click **Edit Settings** next to the **Call History Plugin**

To uninstall the Plugin click "Uninstall" above "Edit Settings" in the Plugins window.

Click **Uninstall** to remove the Plugin from the screen pop.

1-877-862-2562 | business.vonage.com

Using the Plugin

With each call, the Call History Plugin will present the date, time, direction, length and call results. You can even change between results from the day week or month. The app displays calls within the last 30 days.
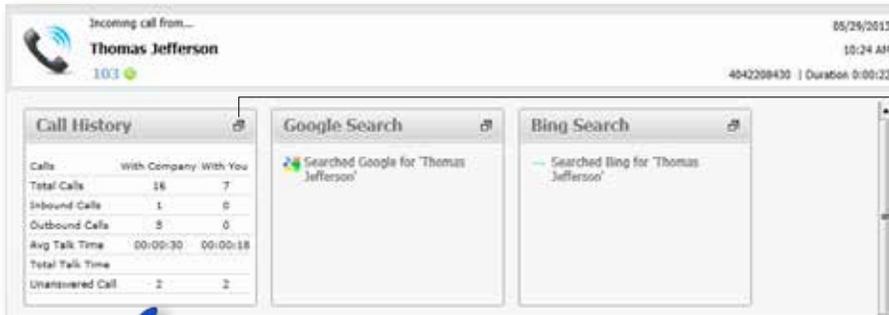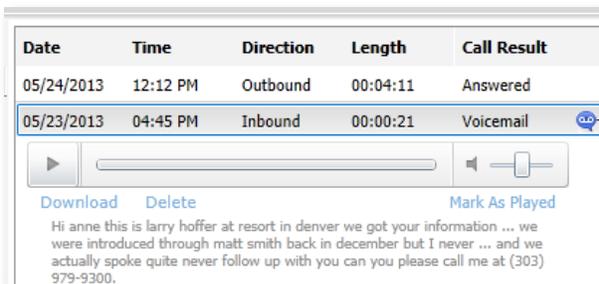

Click here to maximize the Plugin and view a larger Call History summary.

Move between the months to see which days you received calls and view past call history.
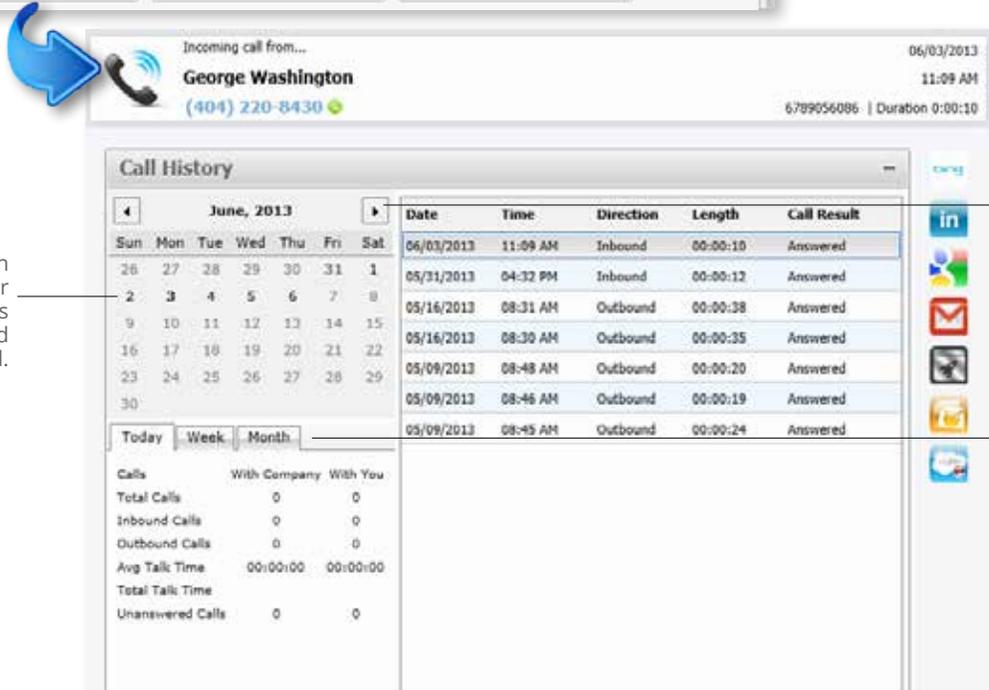
Bold dates on the calendar represent days with a logged call.

Keep track of your total calls, inbound calls, outbound calls, average talk time, total talk time and unanswered calls by day, week, or month.

Click the voicemail icon to play voicemail inline or review a voicemail transcription.

1-877-862-2562 | business.vonage.com