

# 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.



# Table of Contents

Overview	3
Installation5 Signing In	-
Desktop Features	)
Settings	
Plugins15Caller ID Screen PopCaller Location PluginCall History Plugin	

2

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# 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.



## 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: <u>http://www.microsoft.com/getsilverlight/Get-Started/Install/Default.aspx</u>

#### **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

## Vonage<sup>®</sup> Business

## 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 Click

to install

Silverlight.

now to install

### **Common Issues**



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.

#### 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

To view this content, please install

Click now to install

QUICK DOWNLOAD / 30 SECOND INSTALL

Silverlight'

#### 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

Microsoft

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.



## 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**

	washington X101		* 0 0
Directory	Voicemail	Call Log	
Q,			
Users (5)			
🕝 George Wa	shington		101 🥹
🥝 James Madi	son 🍤		104 🥹
3 James Mad	see 🎷		105 🥥
🕝 John Adams	v.		102 🥹
O Thomas Jef	ferson 🎷		103 🧿
e) Call Queues	(1)		

## -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.

Extension x101	and the second of
Available	ORCEDIME.
Do not distarb	

George Wash	ington altit
Exhereiser a101 Australite Die wat dieturb	-
Extension x105 Available Dis not disturb	

#### 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.









## 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

Vocalocity Desktop	T.s		Ar
George Washington	9	200	th
incoming East-	Generated 🧳 GEORG	32	ar
WIRELESS CALL (404) 295-2951	101 I	02:28 PH Duration 0:05	– fo pl
4 H 🗢		6 *	R
Directory Voice	mail Call Log		
9.			_ Se
Disers (5)			01
🥹 Abraham Liricoln 😏		105 😋	– Cl
Constant 1 (100) 295-29	u.	101 😋	ico
😋 James Madison 🎔		104 😋	wi
😋 John Adams 😏		102 🚫	to
😂 Thomas Jefferson 😏		103 📀	m
			– Cli icc th
Call Queues (1)			
Conference Bridges (	1)		

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.

172 100	222000			Call 😝
	1	ARC 2	OF 1	
Det 4		ML 5	MNO 6	
	PORS 7	TUV 8	8392.9	
		0		
Directory	Vesce	init i	Call Log	
à,				
Users (5)				
O Abraham I	uncoln y			105 😋
Q George W	nidaneter			101 🥥
😋 James Ha	ten V			104 6
V John Adam	11 2 (116) 101-1	10		103
<ul> <li>On a call: 3 (884) 921-5242</li> <li>Thomas Jeffreson 2/</li> </ul>			103 🔾	
Call Queue	n (1)			
Call Queo Avg Wat Available	e Time 0:16   2   Bury 0	Waiting 1		701 📀
Conference	e Bridges	(1)		
Conference Attendoes	e Bridge .0			501 🥥

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.

🙄 + George Washington x101						View your Directory
Directory Volcemail Call Log						list in ascending order
Q						_ or arrange from left to
(a) United (5)						ingine.
😳 George Waltington	101. 😜	🥥 Jarres Hadican 🏏	104 😜	🔕 Thurses Jefferson 🏏	90.08	– Easily Click to Call an
C Some Haland	101 🧿	😼 lahn Adam 🛠	100 🔇			employee from the Directory.



## Voicemail

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





## 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.



#### **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.





# Settings

Click the Settings button to display User Settings and Plugins. This section is an abbreviated version of the Web User Portal at <u>my.vonagebusiness.com</u>. Any settings saved within the Desktop will be reflected within the online portal.

🥝 🔹 Amy Smi	th x302		* 0 Å	Click the settings icon to view and manage
Directory	Voicemail	Call Log	U.	your call settings and Plugins.

#### **Profile Settings**

	Profile Settings	
2 Profile Settings	User ID vocal_gm	The <b>Profile Settings</b> page is the
Desktop Settings	First Name George	default first page after clicking
1000 Contraction (Contraction)	Last Neme Washington	settings. Here you can change
Extension Details	Password	well as email and name.
The Manual March Coll.	Confirm Password	
and the state of t	Email product@vocalocity.com	
OO Voicemail	Confirm Email	
-	Secret Question Who was your childhood hero?	
age bences	Answer hatman	
Recordings	Default Extension 101 -	
Call Screening	Personal Numbers Add Number Oxiette Scienced Number	
-	Circle on a name or number to edit	
Monitoring	Name Phone Rumber	Add a personal number to show
📥 Plugins	Cell [0/6] 339-1234	would like to forward a call to.
		Click Save Settings when you are
	Refresh Settings Save Settings	done editing or updating any information you would like to
		save.



### **Desktop Settings**



#### 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.

choose to display toaster notifications.

**Caller ID Screen Pop** 



#### **Extension Details**

	Extension Details	
2 Profile Settings	Basic Settings Extension Number: 101 Extension Type: Extension	
Desktop Settings	User Name: George Washington Calling Plan: Unlimited Extension Direct Dial Numbers: 404-320-6430	
Extension Details	Call Continuity Sension	
💱 Never Hos A Call	Designate a backup number for your extension. The phone number should be in the format XXX-XXX-XXXX-XXXXXXXXXXXXXXXXXXXXXXXX	
00 Voicemail	specified backup number.	Change Call Continuity
Devices	Call Continuity Number	settings, configure <b>7-digit</b>
Recordings	7-Digit Dialing Account Default Area Code (set by account administrator): <u>No Default Area Code</u>	other extension details.
Call Screening	2-digit dialing is the ability to dial only the last 2-digits of a phone number and getting connected to a phone number. Enter the area code you would like to use as the default.	
😏 Hositoring	Default Area Code	
🛓 Plagers	This option will override any Account-specific Dafault Area Code settings.	
	Refresh Settings Gave Settings Canool Updates	

#### Never Miss a Call

A 100000000			
Profile Settings	<ul> <li>Send to Voicemal</li> </ul>		
Desktop Settings	If no answer after 30 (2) seconds send to vocemail.		
Extension Details	Ferward all Calls		
😏 Never Hus A Call	Forward all my calls to Estevision - + Use Caller ID - +		
OO Voicemail			
Bevices	G Fallow Me When my phone mgs		
9 Recordings	Rind Select an extension		
💐 Call Screening	Use Caller ID .		
🎔 Humituring	Simultancous Ring		
thagins	When my phone rings		
	Also ning Select an extension		
	Send to voicemail after 30 🚖 seconds		
	Use Caller ID •		
	🔘 Do Not Disturb		
	Send all cells directly to voicemail without ringing this extension.		
	Please note that the Do Not Disturb option on your phone is unique and does not change your call status.		
	Refrash Settings	Itale Settions	Caural Undates

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



## Voicemail

	Voicemail Settings		
Profile Settings	Mailbox Settings		— Edit Mailbox Settings such
Desktop Settings	Voicemail PIN		as PIN and the email address
Extension Details	Send voicemail to email		
Never Mars & Call	Email address product@vocalor Delete voicemail automatically after send	ing to email?	
y			
OD Voicemail	Voicemail Greetings		— Edit or upload voicemail
Devices	Record name for directory Test_account	м 🕘 🛞 🧰	greetings.
9 Recordings	"I am unavailable" greeting Test_account	ym (4) (1)	
💐 Call Screening			
* Hositoring	"I am busy" greeting Test_account	<u>yn</u>	
Plagins	Use "Out of office" greeting		
	"Out of office" greeting		
	Exiting Voicemail At any time during playback for your voicemail	orestins the caller may press if to	<ul> <li>Change options for Exiting Voicemail.</li> </ul>
	connect to an extension or outside number of remember to change your voicemail greeting t	your choice. If this is active, or remind callers about this option.	
	· None		<i>Please note:</i> if this is active,
	O Ring this number Select an extension		voicemail greeting to remind
	(Table & Sales)	and the second s	callers of this option.
	(and an entropy of the second s	(and straight) (statistication)	
evices			
evices			
	Device Information		Register up to 3 devices by
Profile Settings	Registrar: up-56612.accounts.vocalocity.com Preasy: up-56612.accounts.vocalocity.com	If you change your password, reboot your phone by unplugging and plugging the power cord back in to update your phone with a new password.	filling in the correct informa-
Desktop Settings	Active Device	E911 Location *	tion for each phone.
txtension Details	Device Name Device 1	SIP/Authorization ID: VH294960	
Mever Miss A Call	MAC Address MARC (AD:DREES:S (DE: Y	SIP Password Confirm Password	
00 Voicemuit		Ramona Denter 🔕	Delete a device listed by clicking the "X" icon.
all Drokes	Active Device	E911 Location •	-
0	Provisioning Model *	SIP/Authorization ID: VH297674 SIP Password	
Call Sementing	MAC Address [12:36:12:36:12:36]	Confirm Password	
Can soluting		and the second sec	Add a device by clicking the
2 Monitoring	U Register Res Desce		green "+" icon.
📥 Plugies			

13 VBS201403UGDDESKV01

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### Recordings

		Edit Recordings Settings	Ch
2	Profile Settings	Record all Calls 🔄	All
	Desktop Settings	Select Legal Disclaimer	pr
50	Extension Details	Audio beep every 15 seconds There are both federal and state laws governing call recording and call mentioning. You should consult your own legal counsel for	
У	Never Miss A Call	advice as to whether you are permitted to record your company's telephone calls, and, if so, what notification you are required to include on the call and what consent you must obtain.	
00	Voicemail		Th —— Or
-	Devices		is (
<u>0</u>	Recordings		
-	Call Screening		
Y	Monitoring		
-	Plugins	Refresh Settings Cancel Loddes	

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 **Dn Demand Call Recording** s enabled for the user.

### Call Screening

	Call Screening Settings	Enable Call Screening and
Profile Settings	Cnable Call Screening  Prempt callers for their name so you can identify the caller before answering.	choose the prompt you woul like your callers to hear.
Desktop Settings	Screening Greeting	Choose to record or upload
Extension Details	This plays to identify your extension.	your screening greeting.
🦻 Never Miss A Call	Hear the username/call tag being called after the call connects. Drampie: "You have a call for Sales."	
OD Voicemail	Finable Screening Menu Hear call handling options: "Press 1 to accept the cell, press 2 to send the caller to voicemail, press 3 to transfer the call mumber, press 4 to tourisfer the call by name."	Please enter the number of a phone or extension you are near. Once you click Dial, your phone will ring. Please listen to the instructions on your
Devices		phone to make your recording.
Recordings	there or your Call Automatics + Screening Hermic configuration above, you will need, "You have a call by function, Teo, Press 1 to accept the call, press 2 to send the caller to voicemail, press 3 to transfer the call by sumbler, press 4 to transfer the call by sume."	
Call Screening	"Please note, the last custom tag to send you a call will play.	Phose Number: 6789056000
😏 Monitoring		According Name 29-May-2013_CollScreeningGreetingGreeting
1.00		Dial Cancel Reset

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



#### Monitoring

2	
Profile Settings	Hontoring Whisper/Darge allows users to montor calls for quality and training. Call "Whisper' joins the user to the call but only the agent can hear the manager's voice. Call Barge' joins the manager into the call to speak with both parties. View the user guid for more information.
Desktop Settings	Monitor/Whisper/Barge PIN ****
Contension Details	Display PIN 🔲
Never Miss A Call	
Voicemail	
Devices	
Recordings	
Call Screening	
y Monitoring	
An Colonian	

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 realtime 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.

Refresh Plugins			Click <b>Refresh Plugins</b> to load newly added Plugins to your account.
📥 Plagins	LinkedIn         v2.s3.c7.cs           View LinkedIn search results about your caller.         Default Plagin           Default Plagin         Hore Information           Method CRM         v2.s3.c7.cs           Match calls with your Nethod CRM secount Information.         Default Plagin           Default Plagin         More Information	Uninstall Edit pettinga Install	Check the <b>Default Plugin</b> box to open one Plugin in the maxi- mized state.
Call Screening	Google Search v2.53.87.61 View Google Search results about your caller.	Uninstall Edit Settings	
9 Recordings	Google Contacts v2.13.07.42 Matches inbound calls with your Geogle contacts.	Uninstall Edit Settings	Click <b>Edit Settings</b> to access a Plugin's unique settings.
Voicemail	Vew the geographic location of the caller.	Uninstall Edit Settings	
🦅 Never Miss A Call	Call History v2.13.07.03 View the last thirty days of calls history on the current caller.	Uninstall	Click <b>Uninstall</b> to remove the Plugin.
Desktop Settings	Bing v2.12.07.01 View Bing search results about year valies. Default Flugin More Information	Uninstall Edit Settings	
Profile Settings	United States of States and State	Install	Click <b>Install</b> to install a new Plugin.

VBS201403UGDDESKV01

15



## Caller ID Screen Pop







## **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.



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



To uninstall the Plugin click "Uninstall."





#### 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.





## **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.

🤣 🔹 George Washington x101			*	Click the Plugins icon to open the Settings window.
Directory	Voicemail	Call Log		

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."

Uninstall Edit Settings	Click <b>Edit Settings</b>	Call History Settings and Preferences	
	History Plugin	Activate on Outgoing Calls 🗹 Activate on Incoming Calls 📝	e e

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





#### 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.

