



Computer Softphone

OFFICIAL USER GUIDE

Installing the softphone

1. Download the softphone by going to one of these links:

PC: https://dashboard-app.s3.us-west-2.amazonaws.com/Softphone/HelloSpoke_6.5.5.2_113660.msi

MAC: https://dashboard-app.s3.us-west-2.amazonaws.com/Softphone/HelloSpoke_6.5.5.2_113661.dmg

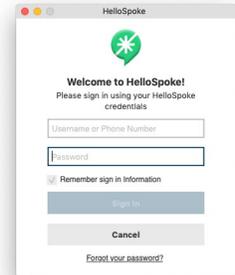
2. Double click the installer, accept the end-user license agreement, and the installation will begin.

3. Follow the installation instructions on the screen.

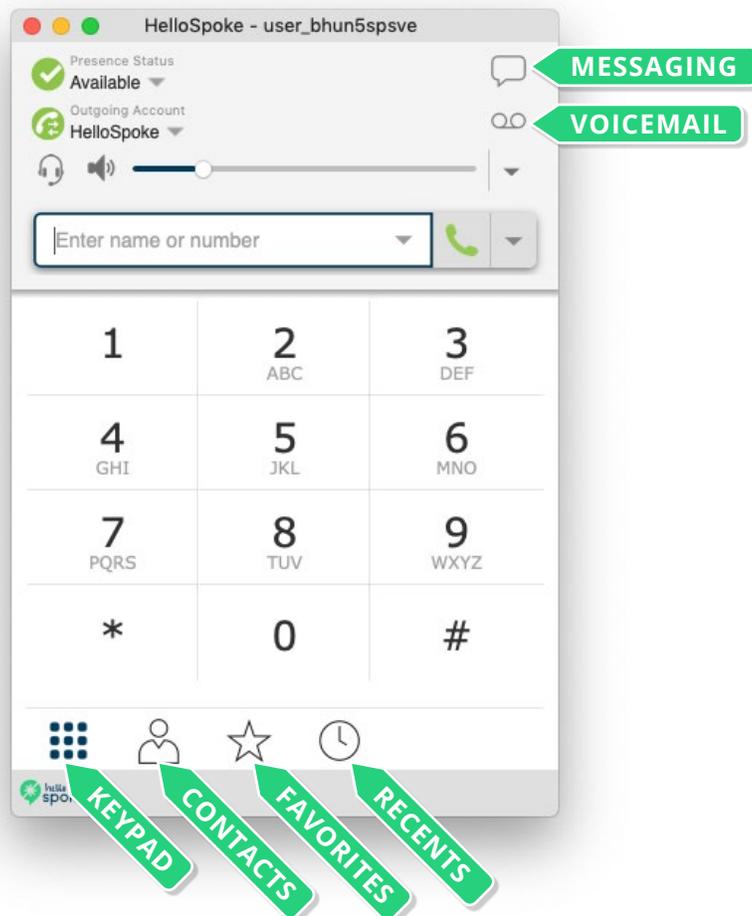
4. After the installation has completed, open the application. You will be asked to provide the following information:

Username: [see admin]

Password: [see admin]



Get to know your phone



Basic call handling

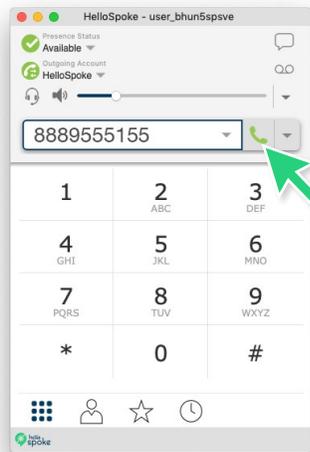
Dialing

Three ways to dial:

1. Type the number using your keyboard
2. Select the numbers using your mouse
3. Select a person or number directly from your contacts, favorites, or recent calls

Click the **green phone button** to call out. 

Click the **red phone button** to end a call. 



ACTIVE CALL



Mute

Click the **microphone icon** to mute the microphone on your phone. You will continue to hear the call. The microphone will have a red slash through it to indicate the call is muted. To unmute, click the microphone a second time.

Hold

Click the **pause icon** to place a call on hold. The caller will hear on-hold music. To remove the call from hold, click the **play icon**.



Transfer

Click the **transfer icon** to initiate a transfer.

Enter the number to which you want to transfer (internal extension or external number).

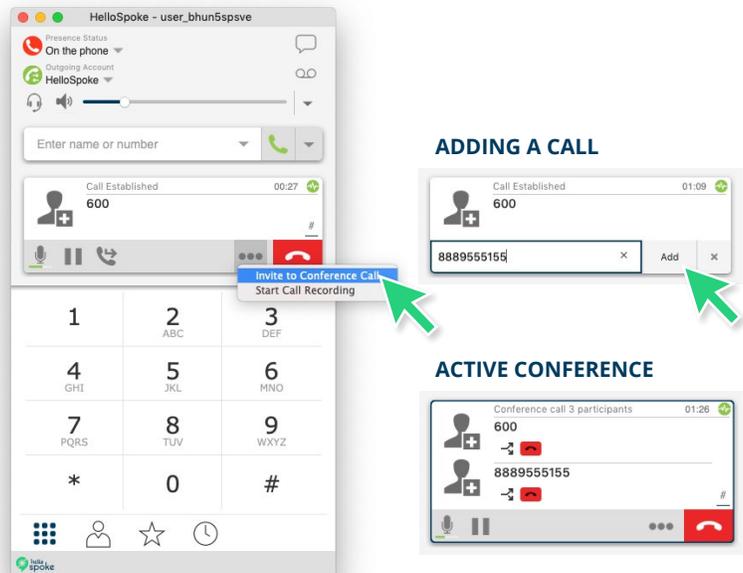
- Blind transfer – click the **Transfer Now** button.
*This process will initiate an unannounced transfer. Once you click the **Transfer Now** button, the call will be released from your phone and be transferred to the destination phone. You will not be able to retrieve the call once it has transferred.*
- Announced transfer – click the **down arrow** and select **Call First**.
*For an announced transfer, allow the call to ring to the destination phone (do not touch the transfer button again). Once the call is answered, verify that the call is ready to be transferred, then click the **transfer icon** again. If the transfer needs to be canceled (no answer/receiving user not able to receive the transfer), click the **X** to cancel the transfer.*



Basic call handling

Initiating a 3-party conference call

1. While a call is active, click the **three dots** and select **Invite to a Conference Call**.
2. Dial the number (internal or external) to be conferenced into the call and click **Add**. If you need to cancel, click the **X**.
3. Once you click **Add**, the 3rd party will be brought into the original call.
4. Managing the conference: the **arrows icon** allows you to separate the calls while the **red phone button** next to each call allows you to end the call with that specific person.

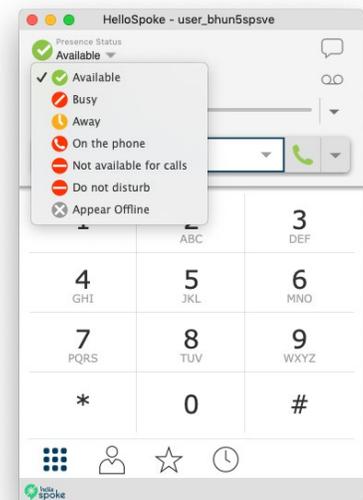


Availability

You have seven presence options. Other employees using their softphone will be able to see your status.

Presence status options:

1. Available
2. Busy
3. Away
4. On the phone
5. Not available for calls – you will not receive alerts for calls
6. Do not disturb – you will not receive alerts for calls or messages
7. Appear offline

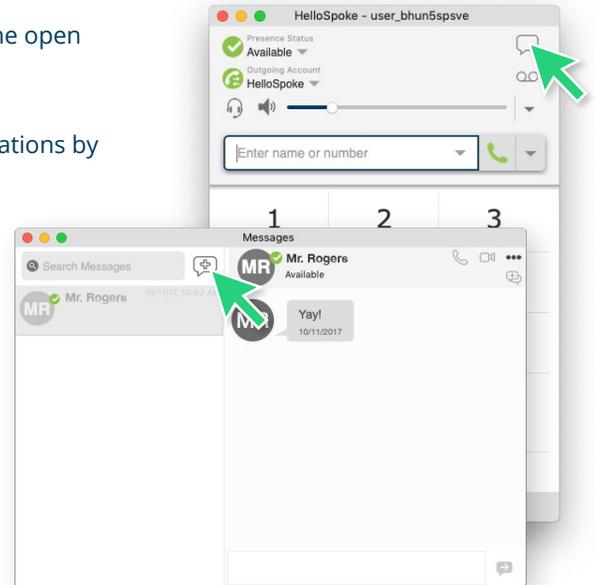


Basic call handling

Messaging

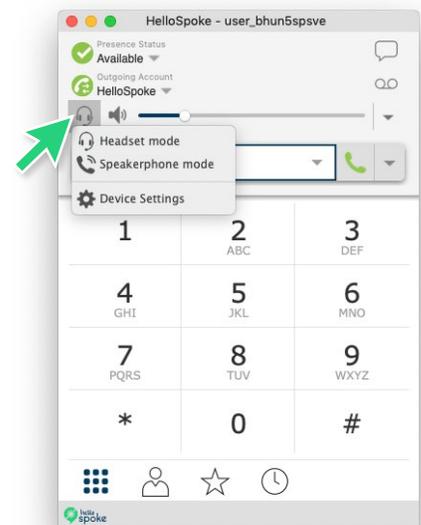
You are able to message between employees that have their softphone open by clicking the **message icon** on the phone.

A messenger box will then open separately, you can add new conversations by clicking the **plus sign icon** at the top.



Speakerphone

You can change the audio output by clicking the **headset icon** and selecting headset or speakerphone.



Voicemail

To access the voicemail system

To listen to voicemail and manage your voicemail options, click the **voicemail icon** (a *98 will appear in the digit field).

Setting up your voicemail (skip this step if you've already set up your voicemail on another device)

1. Click the **voicemail icon** on the phone.
2. Follow voice prompts to setup voicemail features.

Editing voicemail settings

1. Click the **voicemail icon** on the phone.
2. At voice prompt, press 5 (change settings).
 - Press 1 to record personal greeting
 - Press 2 to record name
 - Press 3 to change password

Using a temporary greeting (out-of-office greeting)

1. Click the **voicemail icon** on the phone.
2. At voice prompt, choose 5 (change settings).
 - Press 4 to record a temporary greeting
 - Press 5 to restore permanent greeting

Accessing voicemail system remotely

1. From an outside phone (not a hellospoke phone), call your DID (or dial your main number and access your extension through your auto-attendant).
2. When you hear your personal voicemail greeting, press *.
3. When prompted for your password, enter it followed by #.
4. At this point, you will have access to your personal voicemail features. This will allow you to retrieve messages and access all voicemail features.

NOTE: In addition to receiving your voicemail messages on your phone and using the procedures listed above to retrieve them, you will also receive your voicemail via an email with a recording of the voicemail attached as a .wav file. In order to delete the voicemail from the system, you must use your phone (or remote access). Deleting the email with the attached voicemail recording will not delete the voicemail from the system.

