Desktop Client
Setup and User Guide

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1.0	Separated from portal user guide & updated.	Nigel Dyson	September 2021

Contents

1. Introduction

1.1. Purpose of this document

This manual is designed to be used in conjunction with the Desktop Client application and provides you with all the information you need to use its many features.

2. Desktop Client

Desktop Client is an application that sits in the system tray of your Windows PC and provides several productivity features such as:

- Screen pop ups on your computer that show when you have an incoming call, Voice mail or text - and who it is from
- Integration with certain third-party CRM services (e.g., Salesforce) to identify callers by name and optionally screen pop directly into the CRM application where possible
- Assisted dialling of correctly formatted hyperlinked numbers on a web page (e.g., those starting sip:, tel:, callto:)
- Quick access to your portal website
- Access to your internal directory, personal and shared (company) contacts
- Access to recent made, answered and missed calls, plus Desktop Client "alerts"
- Access to unread Voice mail messages
- Ability to quickly change DND or Divert All Calls (aka CFwd) settings for your phone – or set an activity status such as "Busy", "Away" etc.
- Ability to synchronise this activity status with Skype for Business (SFB) and act as a bridge for calls made from the SFB client to the PSTN
- Support for a customisable "Quick Call" bar where key speed dials can be defined
- Company Address Book access with the ability to Click-2-Talk, leave Voice mail messages directly for colleagues as well as the ability to instant message them
- Support for messaging (IM) multiple colleagues, and calling them from within IM ether point-point or via a configured conference number
- Call Recording downloads, file integrity verification and deletion (for the Company Administrator's account with a Gold subscription only)
- (Depending on version) ability to monitor call activity and DND / Divert status of colleagues' phones
- Ability to dynamically present a different phone number to the people you call – for agents needing to be representing various companies during a working day
- (Optional) integration with a built-in Windows Softphone (available under a separate license)
- Where phone routing has been configured to operate under a time schedule (called time-based routing) access to a "night mode" feature which allows the phone(s) for a company to be moved into their night mode routing earlier than their originally configured time - or taken out of night mode before they would normally be

System Requirements

Desktop Client will only operate with Microsoft Windows based systems with Windows 8.1 Pro (and above) installed. It requires the .NET Framework 4.5.2 to be installed on the PC.

Desktop Client versions

Three versions of Desktop Client are supported:

- Standard
- Enhanced = Standard + call-based presence (in call, on DND etc.)
- Receptionist (see Receptionist User Guide)

The Enhanced version uses a licensing model whereby blocks of "Enhanced" licenses can be purchased. The licenses support a real-time phone-based presence capability which allows a user to monitor phone level operations such as:

- phone status of selected colleagues (in a call, on DND, on divert etc)
- shared voice mail notifications status on quick call banner speed dial buttons
- park bay notifications

Installing Desktop Client

Select >> Support – Downloads

Title			Category	Version	Updated	Size	Download
Altos Desktop Client		PREREQ	Productivity	3.2	14 Sep 2021	21.0Mb	
Altos Desktop Client 64-bit		PREREQ	Productivity	3.2	14 Sep 2021	21.5Mb	
Altos Microsoft Outlook Dialler (32-bit)			Office	1.10	09 Jan 2012	4.8Mb	
Altos Microsoft Outlook Dialler (64-bit)			Office	1.10	09 Jan 2012	5.0Mb	

Download the appropriate 'Desktop Client' application installer file by clicking on the ⊕ icon.
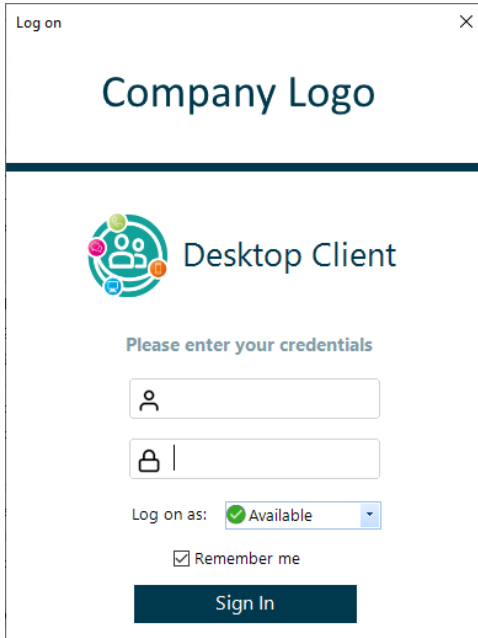
NOTE: For existing customers who have installed the previous 'Phone Buddy' application prior to September 2021, they should uninstall 'Phone Buddy', then download and install the Desktop Client application.

Desktop Client is a full replacement for the previous Phone Buddy application.

Run the installer and, when completed, you will be prompted to start the application. Alternatively, double click on the Desktop Client program icon on

your desktop.

A logon screen will then appear:

You can enter your account *logon* and *password* (the same credentials used for your portal website access). You can also choose an initial status to show to your other Desktop Client contacts (and your SFB contacts if synchronisation is enabled and SFB is running on the same PC as Desktop Client).

Once authenticated, the Desktop Client application icon should now appear in your system tray. Clicking on it should show your current status.

In addition to the system tray icon appearing, the main Desktop Client window should appear. It will look like the following:
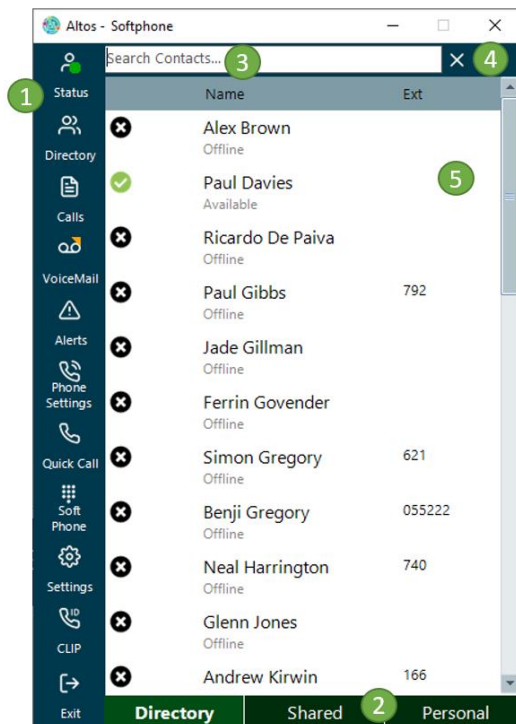
By default, Desktop Client uses a single-window model where the functions that are used the most often are accessible from icons available across the top of the application (1). The main icons represent the following functions:

- Activity status
- Directory of contacts
- Recent Call History
- New Voice Mails
- Recent Alerts
- Phone Settings
- Show / Hide the quick call bar
- Make Call / Softphone
- Application settings
- CLI Presentation options
- Completely exit the application

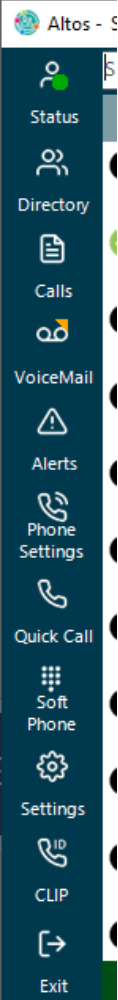In certain cases, e.g., Contacts, a sub-menu (2) is employed to split the top-level functions functionality out into separate parts. This sub-menu will appear as required.

Where appropriate, a simple search mechanism (3) is used to identify a contact quickly. Used in conjunction with the "live search" facility (see Settings) the search will act as a filter which quickly zeroes in on the required data e.g., a specific contact.

Extra icons may be employed the right of the search bar (4) if required. For example, the "Favourites" icon will be shown if the Directory sub-menu of the Contacts icon is shown. This icon allows Desktop Client Enhanced users to add lines for monitoring.

Finally, most information is shown in a tabular format (5). This allows filtering and sorting, selection of individual items etc.

Note also, that the title bar shows the currently selected default phone – this is the phone that operations such as the CTI answering of calls, making calls etc. will expect to use. In the above example with the notification flags, the default phone number has been labelled as "Office Phone" (this is done in the relevant Settings page).

Desktop Client supports "flags" on certain top-level menu items which will indicate events you may have missed:

These coloured triangular flags will appear on the following icons / buttons:

Calls – to indicate one or more missed calls
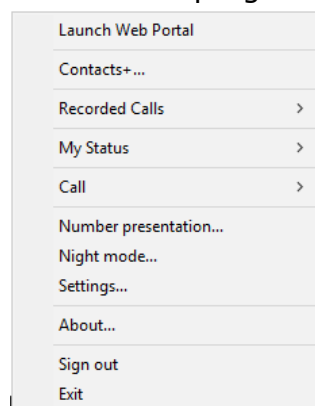VoiceMail – to indicate voice mails
Alerts – to indicate missed alters

The image to the left shows a flag on the VoiceMail button

2.1. Using Desktop Client

From the main window, the top-level options include:

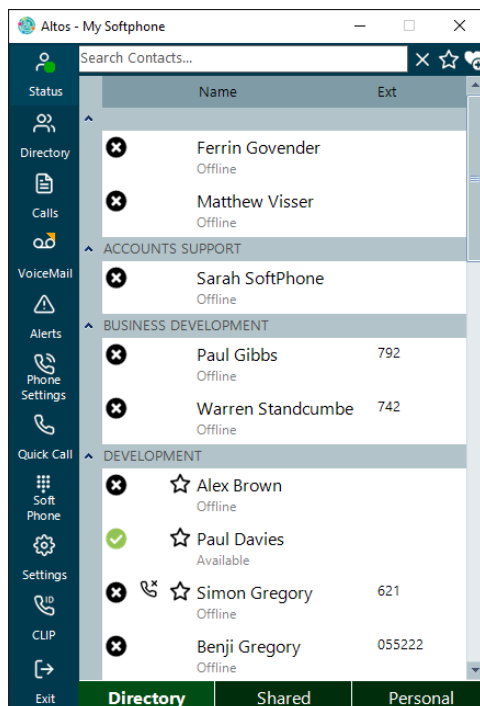| Menu option	Description
Status	Set availability as seen by your colleagues using Desktop Client (and, where applicable integrated into Skype for Business)
Directory	View up to 4 types of contacts: • Directory (Internal) • Personal • Shared • Favourite Internal contacts (optional)
Calls	View up to 3 types of calls: • Missed • Received • Made
VoiceMail	• Access any unread Voice mails.
Alerts	View and react to any alerts sent by other Desktop Client users to you.
Phone Settings	Set DND or Divert on your phone.
Quick Call	Show the floating Quick Call bar that can be customised with your favourite numbers.
Soft Phone	If the user has a Softphone license show access via this icon.
Settings	Control operation of Desktop Client. See the section "Desktop Client settings" below.
CLIP	Access the CLI presentation number controls
Exit	Shut down the application

To reactivate Desktop Client right click on the application icon in the system tray to show the program options list:

Launch Web Portal

Contacts+…

Recorded Calls   >

My Status   >

Call   >

Number presentation…
Night mode…
Settings…

About…

Sign out
Exit

Available options are listed here – some are covered in more detail below:

Menu option	Description
Launch Web Portal	Launch and automatically log in to the Portal using your web credentials
Contacts+	Access internal company contacts and shared contacts. Allows variety of communications options.
[Recorded Calls]	Optionally, where supported allow an administrator to search, download, verify and delete call recordings in bulk.
My Status	Allows the user to indicate if they are busy, away from desk or available to be called. This status is remembered across Desktop Client sessions.
Call	Access to a sub-menu which allows: • Click-2-Talk of an arbitrary number copied from the web / a document. Anything in copy/paste buffer will be inserted. • Click-2-Talk of personal Voice mail • Click-2-Talk of Customer Services • Quick call banner access
Number Presentation	Access to the dynamic number presentation selection.
Night mode	Where supported, allows the user to manually select the Out-Of-Hours routing profile for a chosen phone.
Settings	Control operation of Desktop Client. See the section "Desktop Client settings" below.
About	Information about version, connectivity options etc. It also shows if you have a default phone defined (to make Click-2-Talk calls, allows you to access the release notes and any news).
Sign out	Return to the logon screen prompt.
Exit	Shut down Desktop Client.

Contacts+

This window allows access to most aspects of the service. The main "Contacts" panel is modelled on the portal Internal Directory, Company (Shared) and Personal Address Books. The panel shows your company colleagues, and your personal address book as well as any shared contacts the System Administrator has previously defined on the portal.

The columns shown on the "Internal Directory" tab cover:
- Activity status (e.g., available, away etc.) which can be set using Desktop Client
- Call-based status for their phone (optional extra) which shows when colleagues are on the phone, on do not disturb, or call forwarded
- Colleague full name
- Any associated primary extension (aka short code of their "default phone")

The users can be grouped if required (this is configured in "Settings") as follows:

- by department for colleagues
- by company for all other types of contact

Searches can be done on any part of a full name and, subject to the correct settings, can be done in real time (i.e., the search results are narrowed as the user types characters that form part of a name).

Once a contact has been identified, highlighting it in the list results in several options being accessible from a right click:
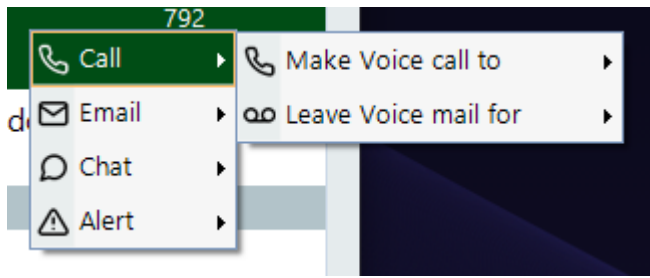
The options vary depending on type of contact (internal vs external) and information available e.g., whether they have a mobile number etc.

Option	Meaning
Call	Call one of the contacts numbers Leave voicemail on the contacts service number (if appropriate)
Text	Send a text message (SMS) to a mobile recipient or contacts service number (if appropriate)
Email	Send an email if the contact has an email address defined
Chat	Begin an IM chat with them (in real-time where their Desktop Client is logged on)
Alert	Send them an alert (in real-time where their Desktop Client is logged on).

NOTE: where their Desktop Client is not logged on any IM chat messages or alerts you send will be stored in the system and forwarded to them when they subsequently logon to Desktop Client (within a short period of time).

The "Personal Contacts" and "Shared Contacts" tabs allows you to Click-2-Talk contacts, send emails and texts. In this respect, it is similar in feel to the "Internal Directory" tab, just without the presence and IM features.

The "Contacts+" panel can be positioned in a convenient place on the screen and left there or minimised for use later. There are also several settings options which govern the behaviour of this panel. For example, if a user double-clicks the title bar of the Contacts+ window, it will reduce in size to show the main menu buttons only (we call this the "banner") – overlaid with any flags such as missed calls or new voice mails. A settings option allows the app to start in this mode ("Start with banner only").

Contacts phone numbers can be directly dialled by double clicking on the contact (subject to settings).
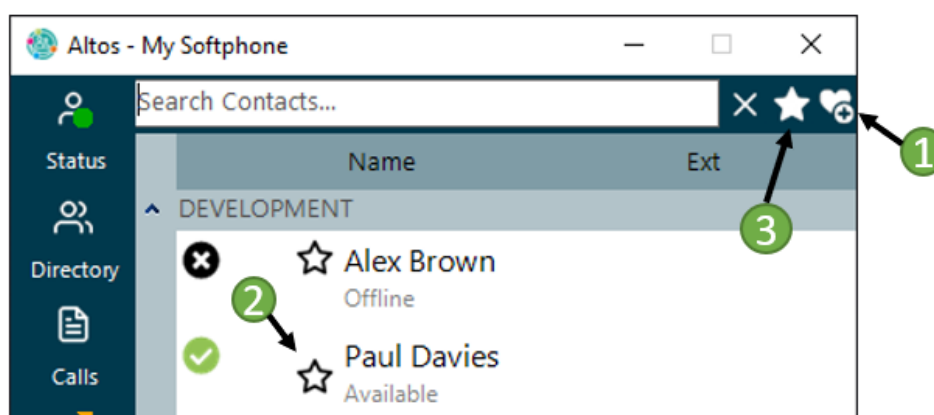
Favourites

In the Desktop Client 'Enhanced' version, the Internal Directory supports the concept of an optional extra feature called "Favourites", which allows several phones to be identified for monitoring phone line activity (sometimes called BLF monitoring), state changes such as DND and "Divert All Calls".

Once the "Directory" option has been selected from the "My Contacts" top level menu, "Favourites" controls are visible (1). Selecting this option shows a panel ("Manage Favourites") which allows a certain number of extensions to be added for BLF / DND monitoring:
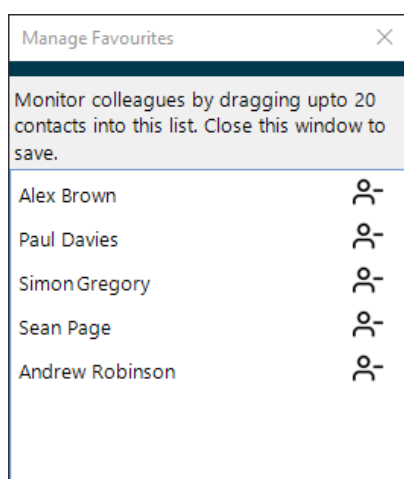
This window allows the selection of contacts from the Directory by simply dragging them into the "Manage Favourites" list. When the window is closed these contacts are saved as favourites. The chosen contacts will be identified back in the main list with a star symbol next to each of them (2).

To see just those chosen favourites, as opposed to the full list of internal contacts, a quick filter (3) is provided. The favourites button changes to a white solid star symbol when this filtering is on and reverts to an outline star symbol otherwise.
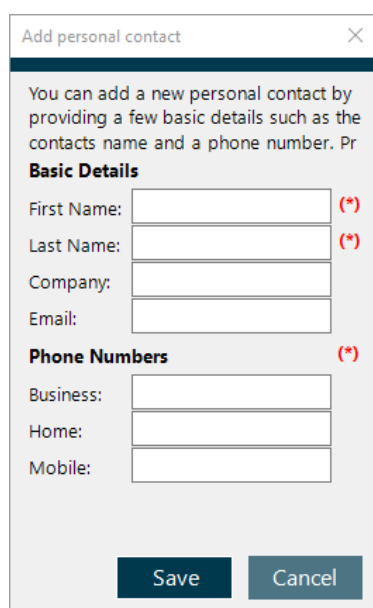
Address Book Contact Management

Desktop Client supports the ability to add, edit and delete contacts in both the Personal and Shared Contacts sections of the Directory.

Additions can be made by pressing the icon to the right of the search icon (where it is available) within the relevant panel (Personal or Shared) – for example, the addition of a shared contact is done from here (1):
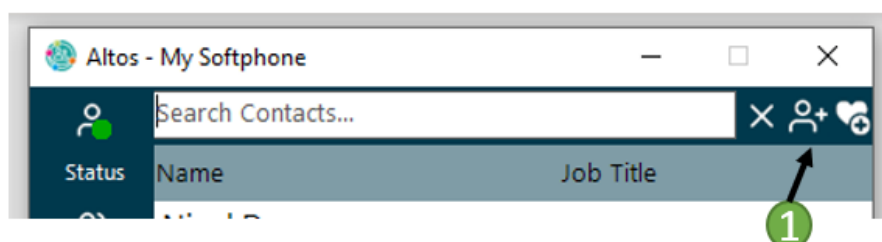
The panel allows you to add several basic pieces of information about a contact as is shown below. A minimum set of information is required to allow the contact information to be saved (shown by the red asterisks). Once saved, the information can be augmented by accessing the portal:

This panel is also accessible from the Call Card of a recent call (see below).

The "Edit" and "Delete" functionality is accessible when choosing a contact (from a right-click operation) in the Personal / Shared Address Book sections:
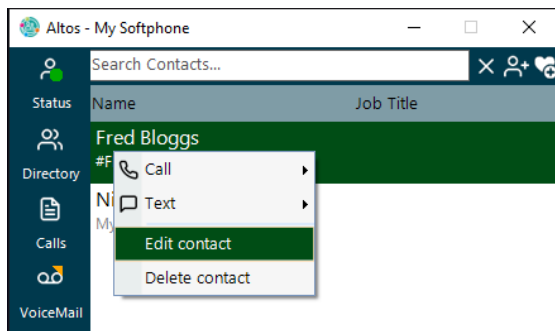
As with the addition operation, "Edit" is available to Company Administrators and normal users. However, deletions of Shared Contacts can only be performed by Company Administrators.

Recent Calls
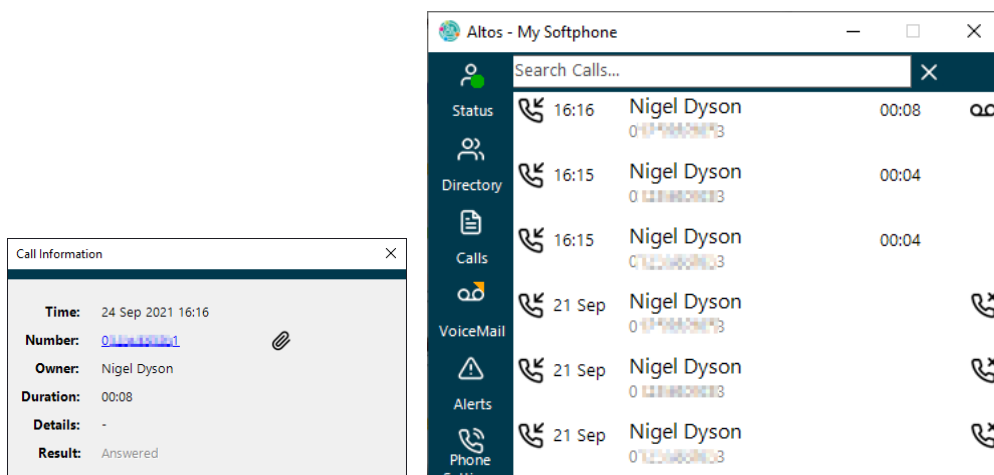
The recent calls panel allows you to view your missed, received and made calls. For each call you select, a "call card" can be viewed which gives details of the particular call and, if your configuration allows it, a hyperlinked number you can click to dial e.g., for returning a missed call, calling personal Voice mail etc.

For each entry, an icon explains how the call was terminated:

⭐   Call was successfully completed

⭐   Caller hung up before call was connected

⭐   Call was not connected

⭐   Call was rejected

Incidentally, the call card allows for a couple of other quick access facilities:

- ability to add a contact to the Personal or Shared Address Book (1)
- ability to download a recording of the call - if the call was recorded (2)
- ability to copy the number to the clipboard for use by this or another application (3)

Missed calls are signified by an orange triangle overlaying a portion of the "Recent Calls" icon. This flag will stay lit until the call history has been reviewed here.

New Voicemails
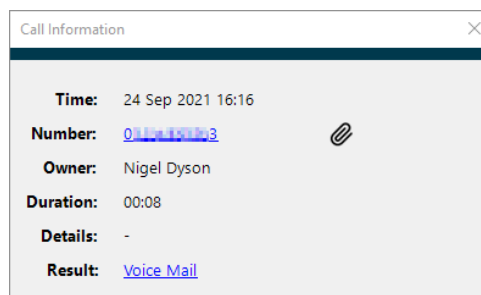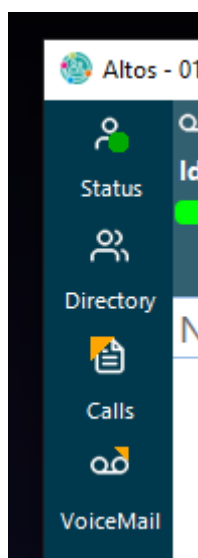
This panel shows any Voice mails that have not been read. Each Voice mail can be downloaded and, as with the recent calls option, selecting each entry will show the "call card", allow call back where appropriate etc.

The availability of new voice mails is signified by a coloured triangle overlaying a portion of the "New Voice Mails" icon. This flag will stay lit until the voice mail has either been downloaded here, listened to using 8400 or processed using the portal.

The icon associated with each entry will indicate the type of Voice mail, for example:

> (1)   refers to a shared VM entry – one that has been left for a central Voicemail box that is being monitored by multiple users
> (2)   refers to a personal mailbox entry

Alerts History
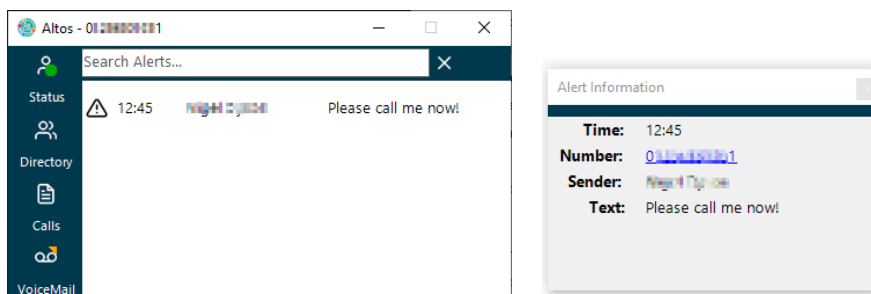
The Alerts panel shows a history of the Desktop Client alerts received during this Desktop Client session. It allows you to review the alerts and reply to the sender(s) as appropriate. Selecting each alert shows an associated "alert card" which, just like the call cards in "Recent Calls", shows sender information and any call back number.

New alerts are signified by a gold triangle overlaying a portion of the "Alerts" icon. This gold flag will stay lit until the Alerts panel has been accessed.

Phone Settings
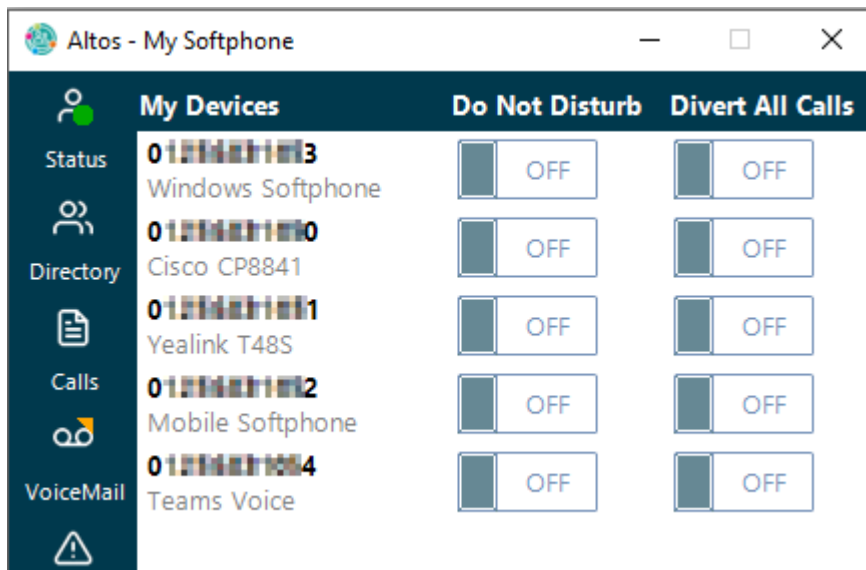
You can control some of the important feature settings of your phone(s) from this panel. Your primary (aka default) phone is listed first, followed by any other phones assigned to you.

You can turn on DND or "Divert All Calls" for your phone, just as you can direct from the handset (where supported). If both are set on, DND overrides "Divert All Calls" and your calls to your phone will typically be directed to Voice mail.
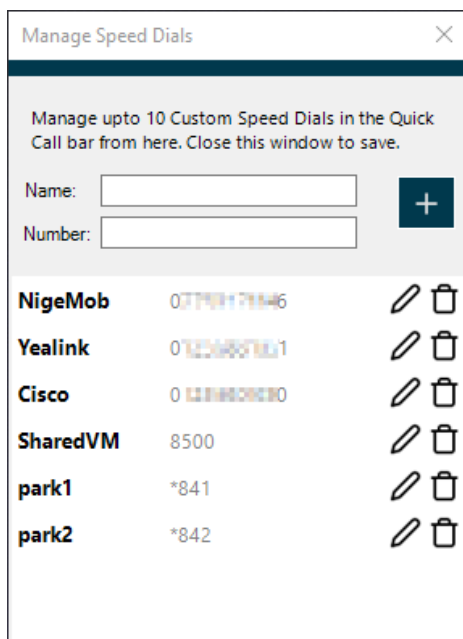
Quick Call banner
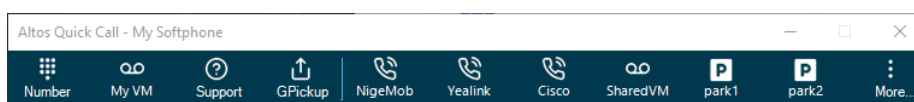
Clicking on the "Make Call" icon launches the Quick Call window. This window provides several standard speed dial icons:

- "Number" which launches the "Call number" window.
- "My VM" which performs a "Click-2-Talk" to your Voice mail number
- "Support" which performs a "Click-2-Talk" to your Resellers support number (where this is available)
- GPickup which performs a "Click-2-Talk" to the Group VM number (*88)

It also provides a "More…" option which allows you to manage several of custom speed dials. These will typically appear between the "GPickup" and "More" options.

The "Quick Call" window is initially docked to the left of the main Desktop Client window but can positioned and left on-screen for use as required.

The contents of the custom speed dial section of the bar are be managed using the "Manage Speed Dials" window.

Using this window, you can add, edit, or delete entries and move them up and down in the display order (this ordering will dictate the left-right positioning in the banner).

There are several types of button that can be specified within the Quick Call Manage Speed Dials window, and each type is represented by its own icon:

- Standard number
- Shared VM (8500xxxxxxxx)
- Park button (*83)
- Park-pickup buttons (*841, *842 etc.)

When running the (optional) Enhanced mode, some of the speed dials change to incorporate notifications e.g., when a caller is parked in Bay#1, a gold flag is shown (if the park bay has been configured in the banner):

Chat

Basic point-to-point and multiple participant chat are supported in Desktop Client. A chat is initiated by choosing a contact in the "My Contacts" Directory list, right-clicking and selecting "Chat".
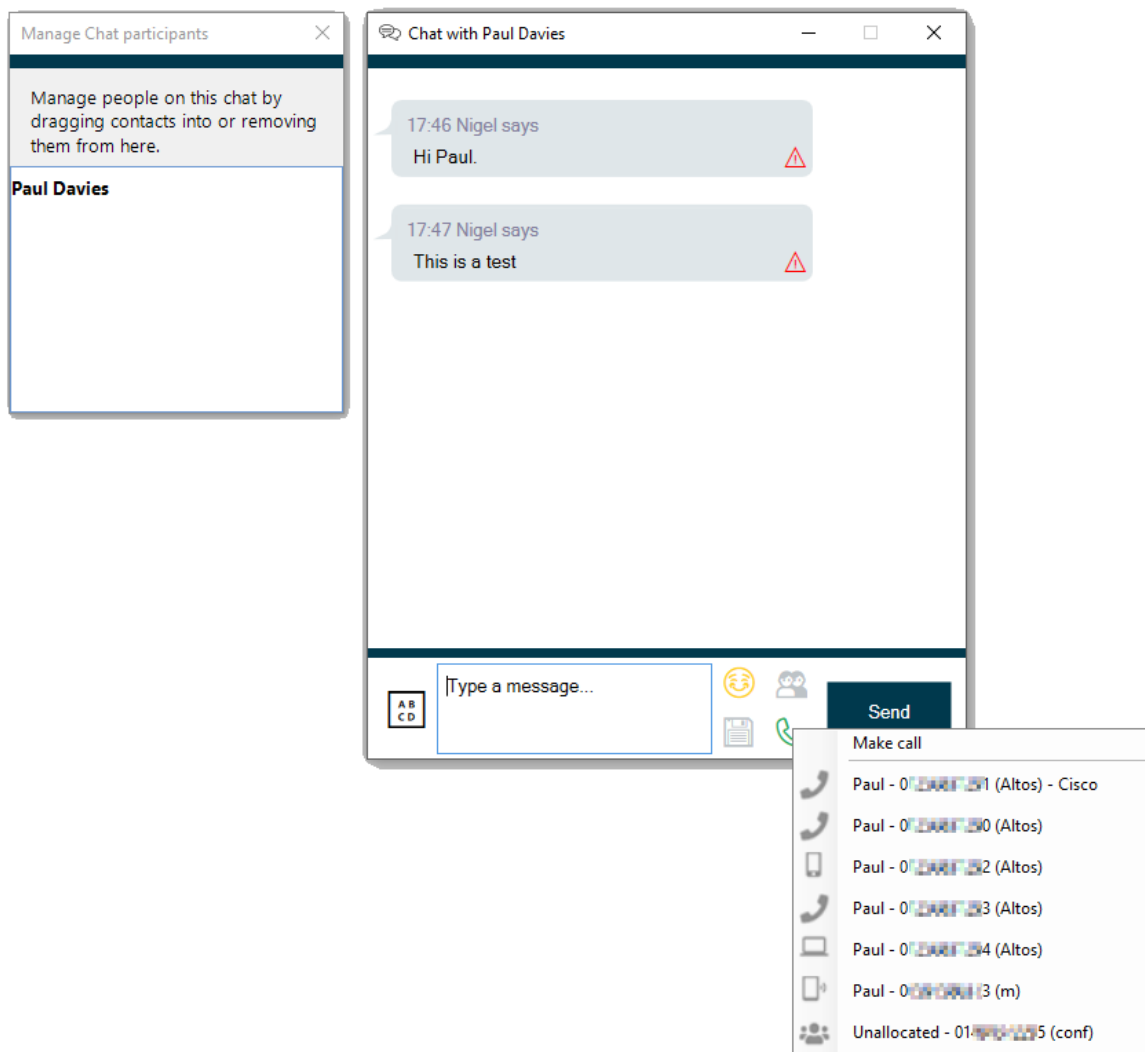
If you wish to send messages to more than one person, you can launch the chat participants window from the initial chat window and then drag other intended parties into the list from the "My Contacts" Directory list. Subsequently, any messages sent will each be sent to all participants.

Anybody who is not online (i.e., not running Desktop Client) at the time a message is sent will have the message stored until they next logon (subject to a time limit for stored messages).

If you are in a chat with one or more people, and you need talk to the other party / parties, choosing the green call icon will list the phone numbers of the participants, as well as those of any defined conference numbers.

You can also save the transcript of a chat by choosing the "floppy disk" icon.

Alerts

Alerts can be sent to another Desktop Client user by right-clicking on a contact in the "My Contacts" list and choosing the "Alert" option.

There are several options for sending alerts:
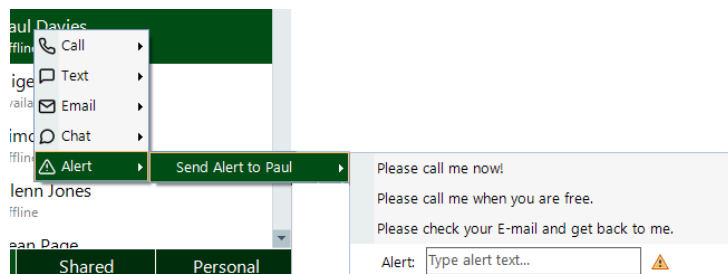
These are comprised of three fixed text alerts plus the ability to send a free-format single-line text alert. In this latter case the alert is typed in the text box and the yellow triangle is clicked / enter key pressed to send the alert.

As with Chat, messages sent to offline / uncontactable users will be stored and will forwarded when possible (subject to time constraints).
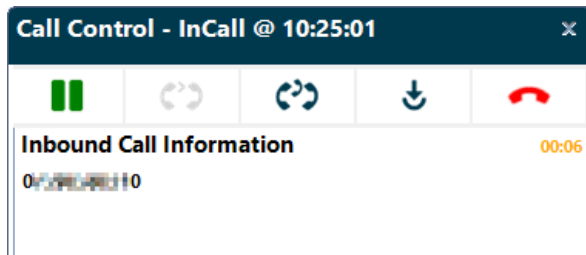
CTI Operations

Desktop Client has the ability for simple call control of the user's default phone (subject to that support being available within the phone itself). This facility is initially disabled but, if available, can be enabled in the Desktop Client settings ("Call Control" page).

For compatible handsets, the following operations are supported:

📞	Answer incoming call
📞	Reject incoming call
⏸	Place received call on hold
▶	Take received call off hold
⬇	Park received call
🔄	Blind Transfer received call
🔄	Begin attended transfer of received call
🔄	Complete attended transfer of received call

	End call

The possible operations will be shown in real time as a phone rings, is answered by an agent etc. For example, a typical CTI panel depicting an answered call looks as follows:

The possible operations for this answered call are shown as buttons. Where a button is greyed out, this means an operation could be possible but requires specific information to continue. For example, in the shot above, the "Blind Txfr" button is disabled until such time as a "target" contact is selected from the Contacts+ window.

The CTI dialog will show caller ID information where this is possible, as well as a call timer for call in play.

Each dialog shown is associated with a single call, either inbound or outbound. So, for example, in an attended transfer scenario, there may be 1 panel representing the initial inbound call (on-hold), while a second represents the outbound call to a colleague.

The CTI panels appear in a stack which proceeds across the screen as more simultaneous calls arrive and are processed. Desktop Client settings control where the panels will begin to appear from.

NOTE: Sometimes it will appear as though a panel disappeared on its own. This should merely be reflecting the fact that the other party (or the system) hung up the call.

Call Flows – Basic make call

The sequence is:
- Use the search facilities of the contact panels to locate the contact to call where this is appropriate
- Choose the relevant phone number where there is more than one
- Make the call using your default phone – depending on the type of phone this should automatically start to ring the target number
- The CTI panel pops with a single "End Call" button
- If the call is answered, the panel updates and shows a single "End Call" button

- To hang up the call press the "End Call" button

Call Flows – Basic answer call then hang up

The sequence is:

- When the default phone starts to ring, the panel shows, with the "Answer" and "Reject" buttons and any caller ID info that can be gleaned
- Press Answer and a short time later the call will be answered by the phone
- To place the caller on hold, press the "On Hold" button
- Similar for resuming a call ("Off Hold")
- When the call is finished press the "End Call" button

Call Flows – Answer call then park the caller

The sequence is:

- When the default phone starts to ring, the panel shows, with the "Answer" and "Reject" buttons and any caller ID info that can be gleaned
- Press Answer and a short time later the call will be answered by the phone
- Press "Park Call" and the caller will be directed to the 1st spare park bay
- The centre of the screen should show a message for a few seconds which indicates which Park Bay the caller was parked in

Call Flows – Answer call then blind transfer

The sequence is:

- When the default phone starts to ring, the panel shows, with the "Answer" and "Reject" buttons and any caller ID info that can be gleaned
- Press Answer and a short time later the call will be answered by the phone – the "Blind Txfr" button may be greyed out
- Use the search facilities of the contact panels to locate the contact to call where this is appropriate – select the contact with a left-click
- At this point, the "Blind Txfr" button will un-grey, and you may choose the relevant target phone number to blind transfer to
- The caller will begin ringing the target number

Call Flows – Answer call then attended transfer

This is achieved with 2 separate panels (one representing the inbound call, the other the outbound call to a colleague etc).

The sequence is:

- When the default phone starts to ring, the panel shows, with the "Answer" and "Reject" buttons and any caller ID info that can be gleaned
- Press Answer and a short time later the call will be answered by the phone
- Press the "Attd Txfr" button and the caller will be place on hold
- Use the search facilities of the contact panels to locate the contact to call
- Choose the relevant phone number where there is more than one
- Make the call using your default phone – depending on the type of phone this should automatically start to ring the target number
- The CTI panel pops with a single "End Call" button – this is a SECOND panel with an outgoing call
- If this second call is answered, the second panel updates and shows a single "End Call" button

- [To hang up the second call (e.g., the colleague does not wish to take the call) press the "End Call" button, then press "Off Hold" on the first dialog to get the caller back]
- The legend on the "Attd Txfr" button will have changed to "Txfr !" – press this button to complete the transfer of the caller to the target

Other considerations

Compatible phones tested with CTI so far include:
- Yealink T46G, T48G although is expected that most of the newer Yealinks will work
- Cisco 504G
- Cisco 78xx 3PCC, 88xx 3PCC

Recommendations for use of CTI include:
- This feature can only be used by people with a registered default phone
- Only deploy for simple scenarios e.g., where you have one person answering calls (not call forwarding chains) – this is not designed to be used as a receptionist-style product
- Call Waiting must be ON (which prohibits the ability to use this with the Call Queuing feature) to allow a second call to be answered by your default phone while an initial call is still on hold – if Call Waiting were OFF, the second call would be rejected with a "Busy" condition
- Fall-back to manual operation in the event of a failure using CTI. This can happen if, for example, a control message does not get through the router back to the phone (control messages are no different to normal messages and, in a network transit with packet loss, may inhibit the ability of CTI to work)

Dialling numbers directly from a web page

Where a number on a web page has been encoded with one of *sip:, callto:, tel:* protocols, Desktop Client can be configured as the program of choice to initiate calls via by using the "Default Programs" feature in the Windows "Control Panel". For example, here is a view of the *sip:* protocol near the bottom of the list:
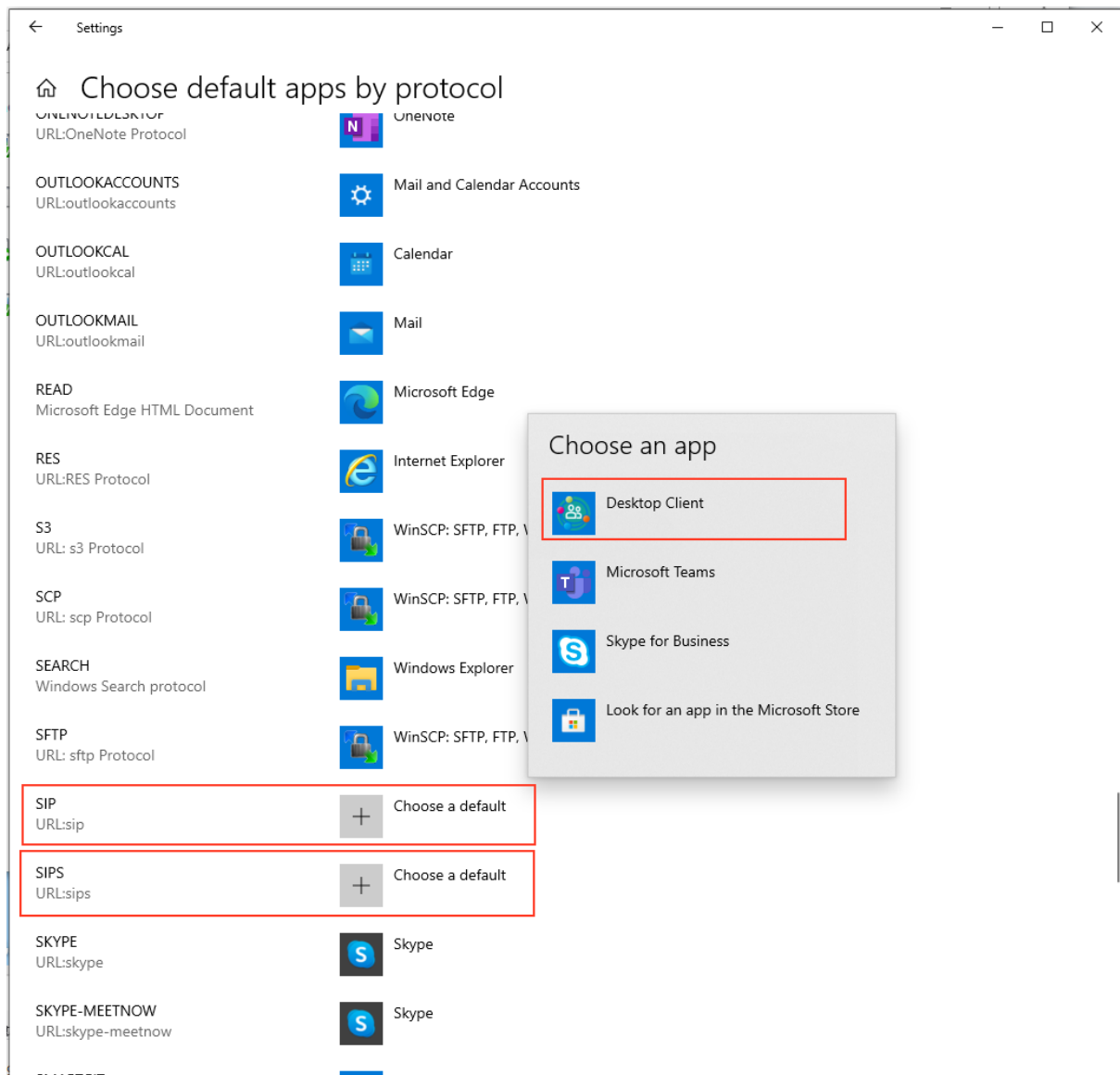
During Desktop Client installation, the application configures itself as an option for each of the above-named protocols. NOTE: it is possible a subsequent install of another communications product (e.g., Lync, Skype etc.) may set itself as the chosen option instead of Desktop Client. Note also that installing Lync disables the TAPI mechanism which has also caused some issues with service integration.

Dialling numbers by copying from a web page

Where a number on a web page has NOT been encoded with a supported protocol, Desktop Client still provides some rudimentary support in that the number can be copied from the web page and made use of by:

- selecting the number in the web page and right clicking -> Copy
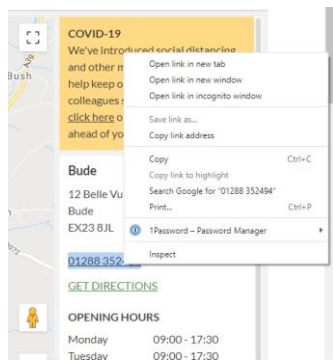
- clicking on the "Call number" and the number will be pre-selected in the dial pad text box ready to call as show below.
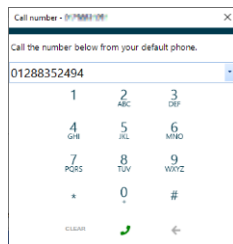
See the section on "Call number" below for more details, as well as the Settings section for a way to make clipboard dialling even faster.

Night Mode

Desktop Client Enhanced contains the ability for a user to change the call routing plan for a phone (or phones) that use the time-based routing (TBR) feature of the platform. Typically, the feature will have been set up during initial phone configuration when the system was first supplied.

The idea behind the facility is that a user wanting to leave the office early can force the main phone into its night service early (e.g., say, the main phone has been programmed to route to VM after hours). Similarly, if a receptionist arrives for work early and is ready to take calls before the main phone would normally come off night service, this is the panel they would interact with.

The facility can be accessed from the system tray icon with a right-click:
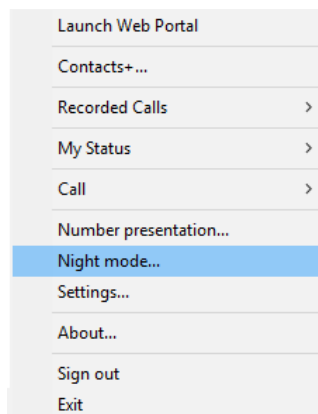
On choosing "Night mode..." an evaluation of the current phones that have time-based routing switch on is made and the results are displayed in a list on-screen for the user to assess.

As an example, the following screen shows five phones that are currently configured for time-based routing. Alongside each number is shown the Schedule the phone is running, the current business period the phone running under, what time this routing period ends and the projected next period after that time:

For each number, two operations are possible depending on the currently selected business period.

⏱	Advance Period – this is used for moving the selected phone to the next business period as shown in the list. Do this if leaving the office early etc.
↺	Reset Period – this is used to reset the phone back to the currently configured automatic time period – i.e., to put the phone back "in-schedule". Do this to undo any previous "advance" operation.

When either button is pressed a confirmatory message is shown on-screen:

ⓘ Updated settings for 02081502509
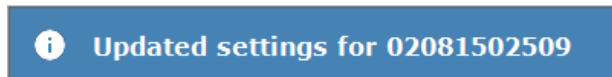
The change in routing profile should become active from that moment on and will remain in place until the next timed period is reached. E.g., if putting night mode on (to VM), say, 15 minutes before it would normally happen (automatically), the routing will be advanced to "Forward all calls to VM" and then 15 minutes later it will stay on "Forward all calls to VM".

Dynamic Number Presentation

Desktop Client users have long been able to make calls using the standard number presentation facilities of the platform. These allow an approved number to be presented to called numbers whether the call is initiated directly from the phone or using the CTI facilities built into Desktop Client.

The facility, historically quite "static" in nature, has been enhanced so that the presentation number can be changed within Desktop Client itself, calls made, then changed again. This is achieved by having a floating window that can be enabled from the Settings panel ("Call support") as described in the section below on settings.

If Number presentation is enabled, the following floating window appears and can be moved around the screen independently of the main application window:

CLI Presentation   — ☐ ✕

Choose the number to present when making calls.

My default number   ▾
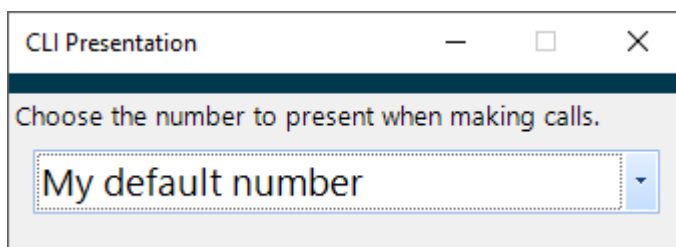
The list of possible presentation numbers is analogous to that shown in the portal and contains all account numbers plus any approved numbers set up by the Reseller on your behalf.

Select the number you require, then begin making CTI calls. Change the number and make more CTI calls. Set to "My default number" to display either your handset number or any "statically" defined number as seen on the portal.

Note that all calls to colleagues in the same company account will bypass any number presentation feature, just as they do when calls are made direct from your phone to a colleague's phone.

Note also that, if the Number presentation window is closed, it can be opened later by accessing the context menu from the system tray (right click) and choosing "Number presentation...". This does not affect the value of the setting, which means that occasional users of number presentation can make use of the facility without it appearing on subsequent Desktop Client invocations.

Call Forwarding Group Login

Users can manage their participation in call handling by toggling themselves (their default phone) into and out of dynamic call forwarding groups. This is achieved by accessing the menu item "Call Groups..." from the system tray icon:
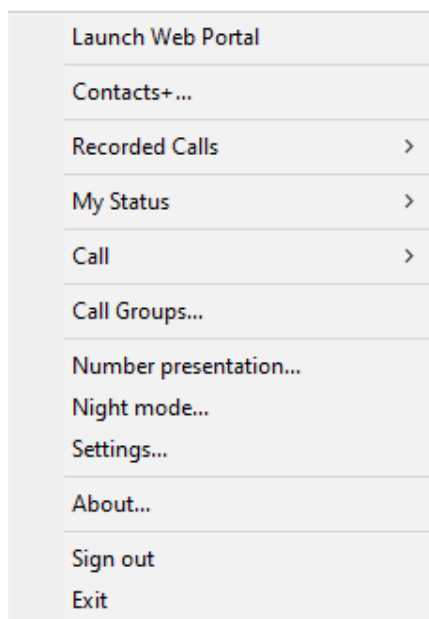
Choosing this option presents you with a floating panel which shows the list of call forwarding groups that you can login to or out of. If your phone is logged in already, it will be shown with a tick, else a cross.

Clicking on the icon will toggle the state of your inclusion in the relevant group. This setting will be retained until you toggle it again using either this panel or direct from your phone:
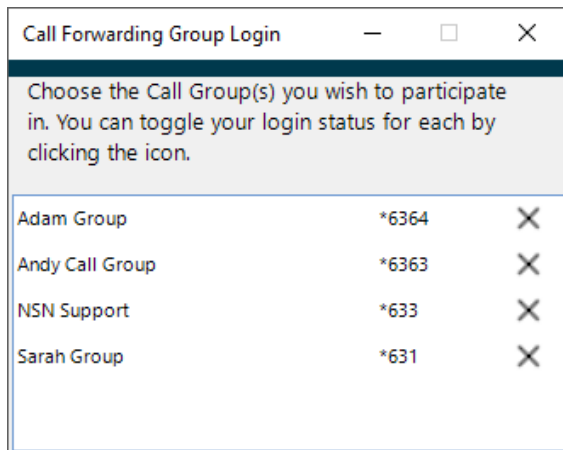
2.2. Integrated Windows Softphone

Introduction

The Windows Desktop Client application has an embedded Softphone capability built in. This allows for telephony operation without the need for any associated phone hardware - such as a desk phone. It can mean that you can use a desk phone in the office and, on returning home, make use of the inbuilt Softphone to continue making and taking calls.

Note that the Softphone facility requires an associated license (e.g., a Gold or Silver subscription) to allow a CLI to be provisioned onto it. This would typically be ordered at the same time as the Windows Softphone. Only one Softphone license per user is supported i.e., your Company Administrator can pair a Softphone license with an appropriate subscription for you – moving the subscription to your user within the portal.

Softphone installation

The Softphone component is bundled with the latest Desktop Client installer (dated 12 May 2019 or later). It is recommended that, before using the Softphone for the very first time, you undertake the following steps:

- Uninstall any existing Desktop Client or PhoneBuddy installation (from the Control Panel "Add / Remove programs" or "Programs and Features" depending on your O/S version)
- Logon to the Portal, and head to Support->Downloads
- Select the Tools tab
- Download the Desktop Client (64-bit) package

Title		Category	Version	Updated	Size	Download
Altos Desktop Client	PREREQ	Productivity	3.2	14 Sep 2021	21.0Mb	
Altos Desktop Client 64-bit	PREREQ	Productivity	3.2	14 Sep 2021	21.5Mb	
Altos Microsoft Outlook Dialler (32-bit)		Office	1.10	09 Jan 2012	4.8Mb	
Altos Microsoft Outlook Dialler (64-bit)		Office	1.10	09 Jan 2012	5.0Mb	

- Install the package, following all prompts - the Softphone component will be installed as part of this operation.

## Softphone window

On accessing the top-bar icon, the window presented looks like that shown here:
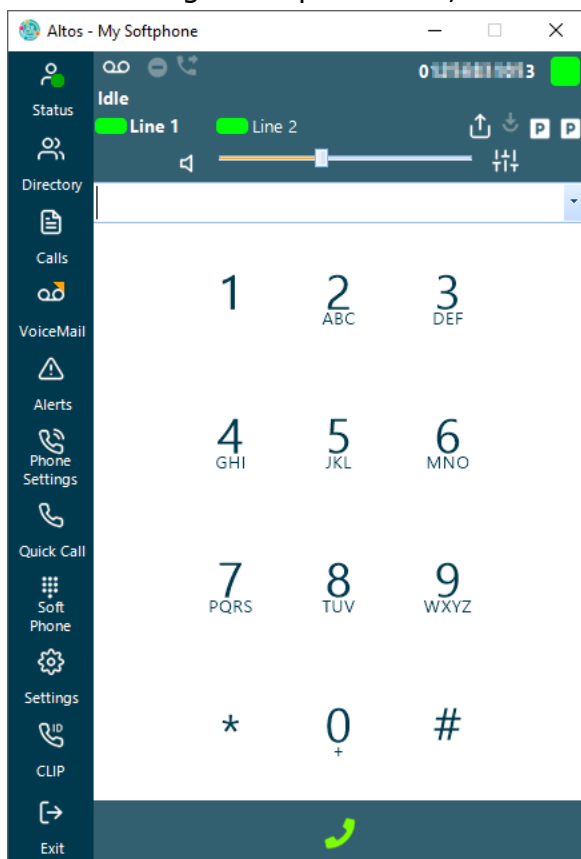

Salient features of this panel include:

- The title bar description indicates that "My Soft Phone" is being used as the "default phone" – see the Call support tab in the Settings panel for more information, where it is possible to label each of your service CLIs to make them more distinguishable

- The CLI associated with the Softphone is shown and, next to it, the registration status of the phone with the platform is depicted as a green square (for registered) or a grey / red square (for not registered)

- The strip of buttons on the left show the status of your Voice mail, DND and Unconditional divert – they mirror the facilities found on desk phones. They are interactive in nature in that they can be used to trigger actions. For example:

    - The VM icon calls the 8400 Voice mail number so you can check for new VMs
    - The DND icon allows you to set the DND status of the Softphone CLI, so if you are busy, you can switch DND on and all calls will go to Voice mail
    - The Unconditional divert icon allows you to control the "divert all calls" setting of the Softphone CLI, so if you are leaving the office, you can forward all calls to your mobile

- You have 2 lines. So as an example of call handling, you can take a call on Line 1, put it on hold and make another call using Line 2.

- You can set the volume preferences of the speaker and microphone, choose appropriate playback and recording devices etc
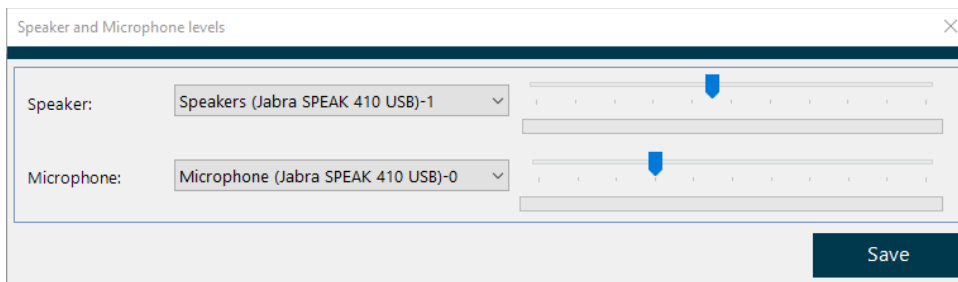

- Some "quick dial" buttons are provided below the speaker / mic control which allow quick access to platform facilities. These include:

    - - Group Pickup (*88)
    - - Call Park (*83)
    - - Park pickup from bay 1, 2 (*841, *842)

When parking a call, the park bay is communicated to the user:

P   Caller parked in Bay 1
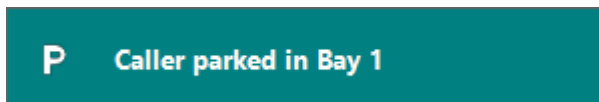
In addition, the Park pickup buttons glow when a call is parked and information about the parked caller can be found by hovering over the relevant "glowing" park bay icon:
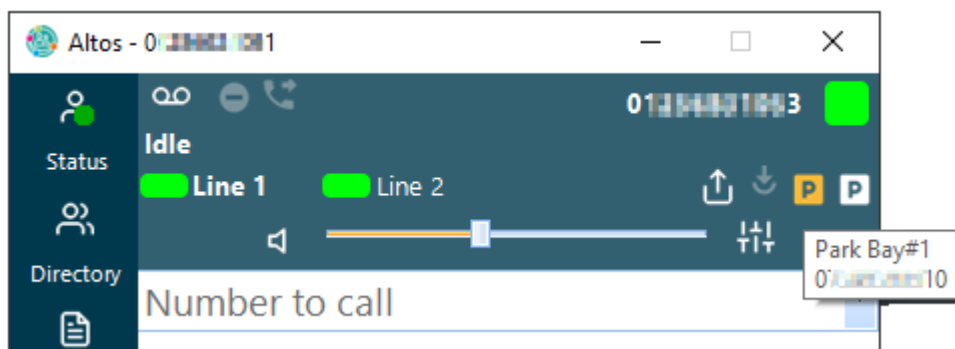
- The "Number to call" text box is an auto-complete style field which allows you to start typing a name or number and automatically searches the platform address books for matches as you continue typing which it presents in a list
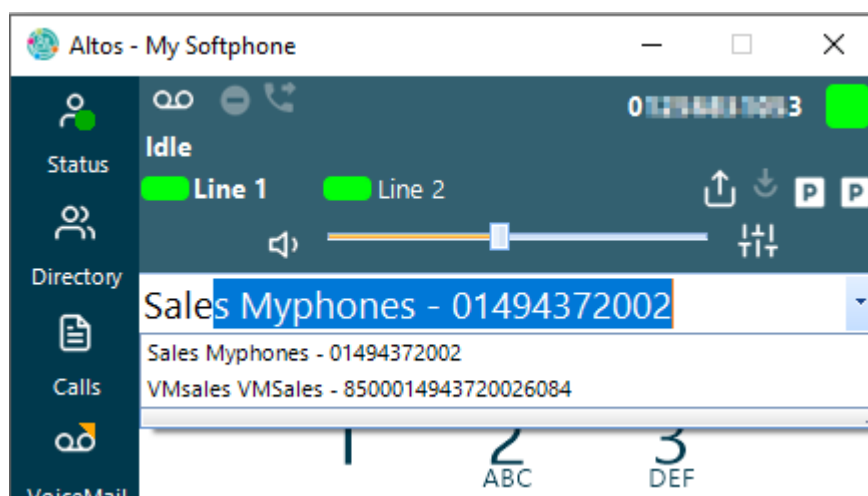
- The keypad allows the typing of numbers to make a call and initiates DTMF keypresses once a call is connected, allowing you to traverse IVR menus and choose options.

- The phone has inbuilt CTI operations that make it easier to manage calls – these options mirror those available in the CTI dialogs (see above) and you can use one mechanism or the other when dealing with calls:
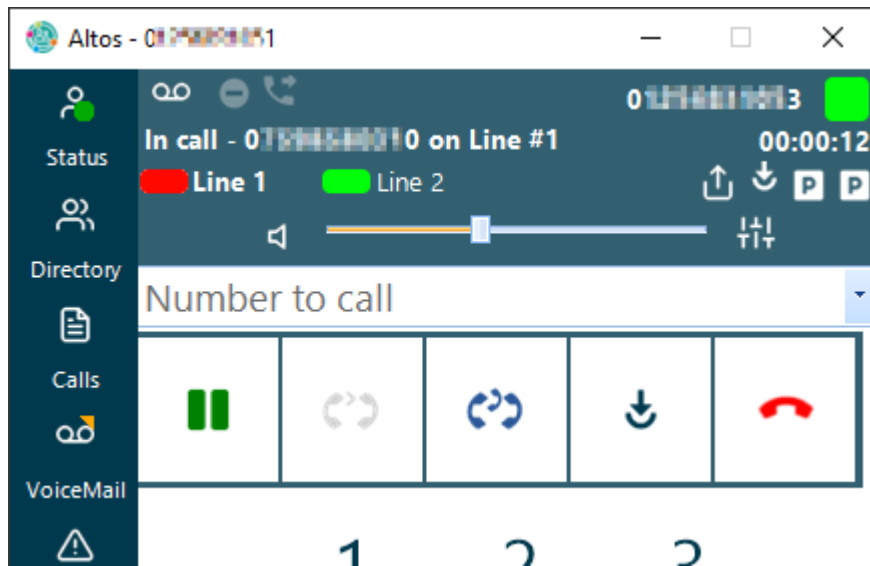
See the section above on "Call Flows - " under "CTI Operations" – which describe how to perform operations such as blind transfers etc. That information is just as pertinent here – as you will note distinct similarities between the CTI window behaviour and the Softphone button behaviour during handling of a call.

- There are many settings which govern the operational behaviour of the Softphone – such as customisable ringtones, call answering behaviour and echo cancellation. These are shown in detail in the Setting section later in this document.

Softphone initiated 3-way calling

With one call already in progress, it is possible to call a second party and then initiate a 3-way "ad hoc" conference joining you, the first party and second party.

This is achieved by adhering to the following steps:

- Call and connect to the first party, for example a mobile phone – this call will be made and connect using Line 1.

- At the appropriate point in the conversation, press Line 2, which will place the party on Line 1 on hold and present a new keypad for dialling.

- Call and connect to the second party, for example a colleague – this call will connect on Line 2.

- At this point you will have your first party still on hold, your second party in conversation, and a new option button called "Conference" will be available to you:
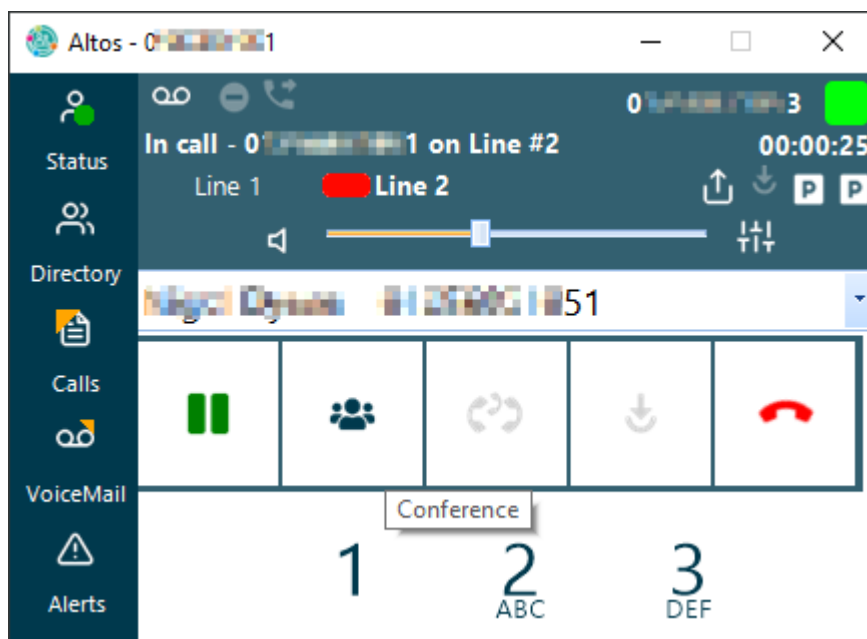
- Pressing the "Conference" button connects all 3 parties together:
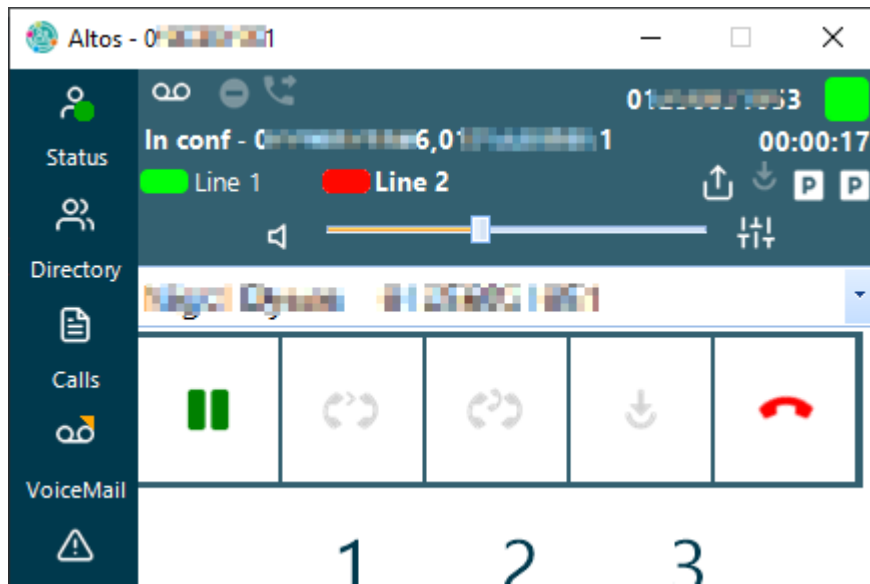
The display changes to show that you are "In conf" with the other two parties and displays each of their numbers.

- If you subsequently end the call, both parties are hung up - but if either one of the other parties hangs up, they leave the "ad hoc" conference - which leaves you and the other party still connected.

2.3. Desktop Client Settings

Before general use, the first task is to set up Desktop Client based on your needs.

Notifications

Select >> Settings - *Notifications*

This panel allows you to set several parameters governing the way inbound notifications of calls and other significant events will be flagged to you. This covers the following options:

Display popups for ringing calls / answered calls, voice mails (VMs) etc.

Selecting a combination of these options means your PC displays a pop-up informing you of an incoming / answered call on one of your service phones or the receipt of a voice mail, text message or fax.
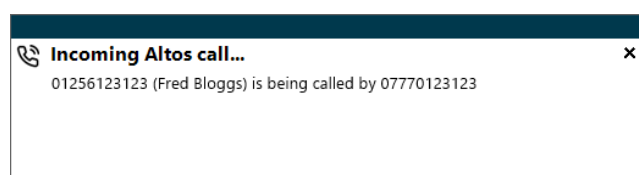
You can also be notified when your colleagues log on and off their own Desktop Client applications (aka "status changes").

Popups should include Numbers and Names

Choose from the pull-down list whether you would like Numbers and or Names or both displayed in the popup. This information is collected from the address books on the portal website.

Decide how long you would like the popup to display for. The default is 10 seconds.

Decide on the style of popup – there are several styles supported e.g., original (can be seen above), contemporary etc.

Popups include company

Check this box if you would like associated company information if we can locate the name of the caller from one of the Address Books you have previously populated via the Portal.

Check 3rd Party Providers

Decide whether you wish to use contact information from the Address Books or from certain external services when identifying incoming calls from the phone number. This feature is described in more detail below. If you only want to use an external service to resolve the number to a name, this should be set to "only".

and pop

Decide whether you wish the external service to screen-pop a record if the contact can be identified from the incoming phone number. This depends on external service support for this feature.

Play Sound on Notification

Check this box if you would like a sound played when the popup appears, or if you wish the notification to be visual only.

My Contacts

Select >> Settings – My Contacts

These settings affect the behaviour of the My Contacts panel:

Group Directory contacts

Where department has been defined as part of internal contact setup, this option will group internal contacts by department when Desktop Client starts up. The option only applies to internal contacts.

Remember Directory groupings

Remember the user choices for showing / hiding groups between Desktop Client sessions.

Only show Directory contacts I can phone

Filter out contacts with no phone number.

Only show Directory favourites initially

Filter out contacts that are not favourites (Enhanced only).

Include myself in the Directory

This option allows you to include yourself in the list of contacts – useful for demos.

Group Personal / Shared contacts

Where company has been defined as part of a personal or shared contact setup, this option will group contacts by company when Desktop Client starts up. The option only applies to personal or shared contacts.

Live search mode

This option, applying to internal, personal and shared contacts, alters the search results in real-time as you type the surname, first name etc.
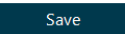
3rd Party Contact data

Select >> Settings – 3rd Party Contact data

Desktop Client supports a level of integration with certain 3rd Party CRM tools such as Salesforce. You can choose one of the supported services (called "Contact Providers" in Desktop Client) to perform contact lookups against.

Their primary job is to identify a contact / prospect or other person from the incoming phone number, typically by accessing their own data store. In addition, they may be able to show the contact information (called a screen-pop) themselves i.e., within their native user interface such as a web browser.

The current options for providers are:

- Microsoft Outlook (where it is installed on the Desktop)
- Salesforce (editions supporting "Web Services API")
- Base CRM
- Zendesk (cloud-based)
- Dynamics 365
- Generic URL – screen-pop information for services you utilise that are accessible via an arbitrary URL you provide
- Generic Program – the ability to hook out to a custom piece of code which can be written to interface directly with a customer's own CRM system

Choose the option you want and click [Save] to save the information. Desktop Client may check the connection with 3rd party providers e.g., Salesforce.

Note that when Desktop Client receives call notifications, these 3rd Party options only work when the "Check 3rd Party Contact Providers" setting is set to "only". Otherwise, the Company and Personal Address Books will be searched using the CLI details on the incoming call.

The information Desktop Client can provide to the 3rd Party Contact Provider consists of:

- Callers CLI
- Originally called CLI e.g., a Virtual Number representing "Sales"
- Targeted CLI – the number belonging to the user logged on to Desktop Client that is currently receiving a notification

So, using the 3rd Party Contact providers feature makes sense where customer data resides outside of the telephony system.

Specific Contact Provider settings follow are presented in the following sections.

Salesforce

Select >> Settings – 3rd Party Contact data – Salesforce

Enter your Salesforce Username and Password. In addition, to access the service you need to generate a Salesforce Security Token on the Salesforce website – follow the instructions contained within the page at the URL https://login.salesforce.com/help/doc/en/user_security_token.htm. Once generated, copy and paste that token into the "Security Token" slot.

Click [Save] to save the information.

Note that the search pattern Desktop Client uses when talking to the Salesforce API uses the standard data model classes "Contact", "Lead" and "Account". So, Salesforce applications built on the out-of-the-box model will work fine, whereas custom applications will require the use of the Generic Program option and also require the customer to write code using the custom API generated by Salesforce in a separate Windows executable.

Base CRM

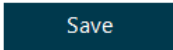Select >> Settings – 3rd Party Contact data – Base CRM

To access the service, you need to generate a Base CRM Access Token from your Base CRM website – follow the instructions contained within the page at the URL https://developers.getbase.com/docs/rest/articles/first_call#generate-access-token. Once generated, copy and paste that token into the "Auth Token" slot.

Click **Save** to save the information.
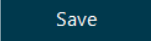
Dynamics 365 (cloud-based)

Select >> Settings – 3ʳᵈ Party Contact data – Dynamics 365

Your Dynamics 365 administrator can give you the logon information required to enter in the setup fields.

Click **Save** to save the information.

Zendesk

Select >> Settings – 3rd Party Contact data – Zendesk
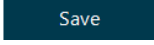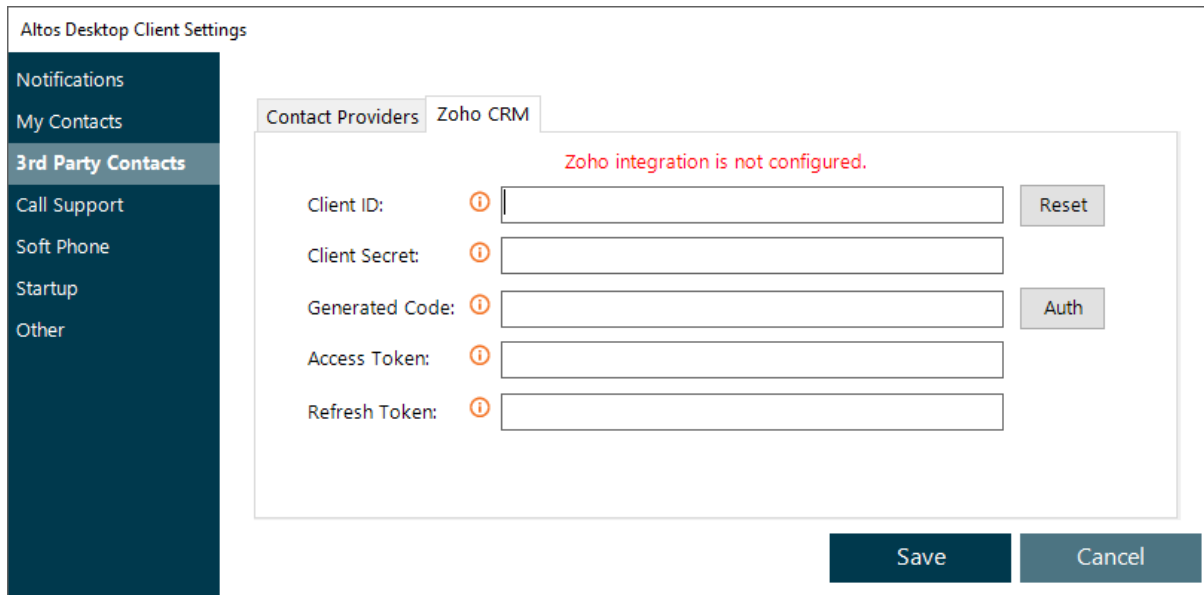
Your Zendesk administrator can give you the logon information required to enter in the setup fields. An API token is required for each user of Zendesk, and this token is created within the Zendesk portal environment.

Click [Save] to save the information.
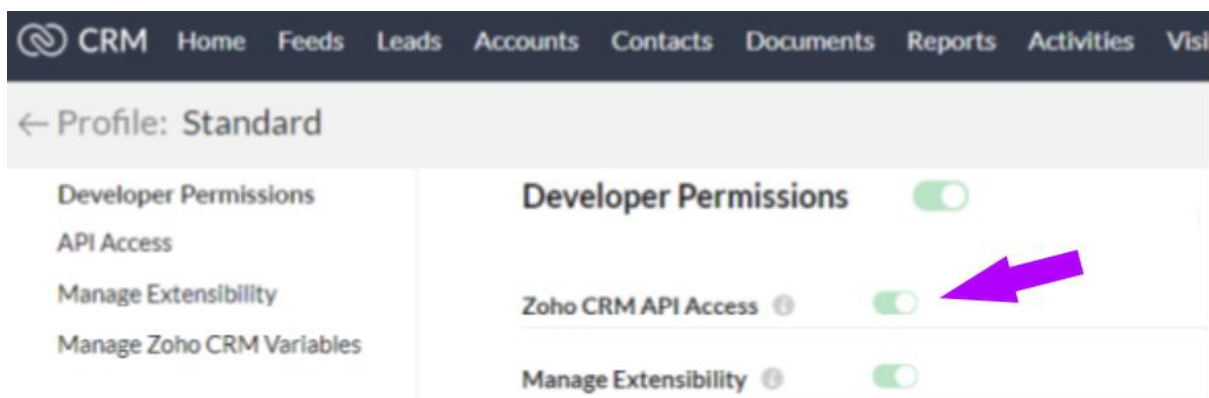
Zoho CRM

Select >> Settings – 3rd Party Contact data – Zoho CRM

The Zoho CRM provider makes use of the Zoho API v2 which places certain preconditions on the administrator of the Zoho instance as follows:

- Each user making use of the Zoho CRM instance requiring API access must have that required privilege setup in the appropriate profile:

- The Desktop Client "application" needs to be registered to use against the Zoho CRM instance. This is done using the Zoho API Console (https://api-console.zoho.com) as follows:

  o Press GET STARTED

  o Create a "Self Client" application:
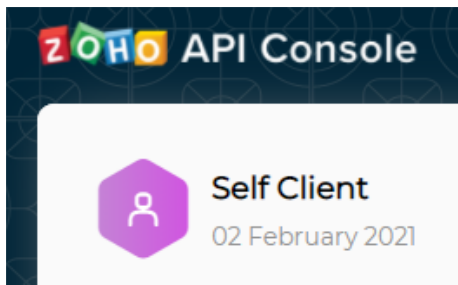
o Press CREATE:
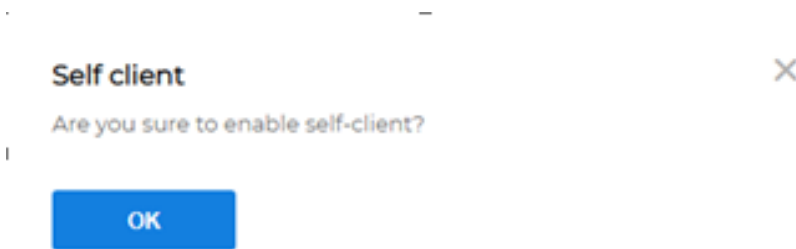
Confirm by pressing OK.

o From the "Client Secret" tab, copy the 2 generated keys – Client ID and Client Secret – into the relevant slots in the Desktop Client settings page

o In the "Generate Code" tab set the following:
  ▪ Scope = ZohoCRM.modules.ALL,ZohoCRM.org.ALL
  ▪ Time Duration = 10 minutes
  ▪ Scope Description = Desktop Client Access

o Pres CREATE

o Click on the CRM link:
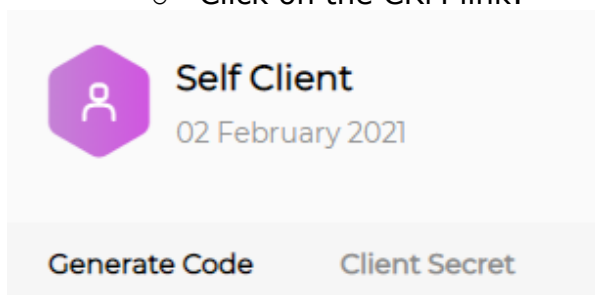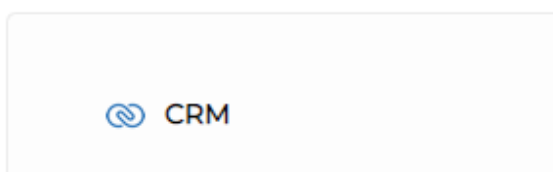
- o Choose your CRM instance:

- o Press CREATE. At this point he all-important "Grant Token", otherwise known as the "Generate Code" is produced:

- o Copy the resultant "Generated Code" into the appropriate section of the Desktop Client settings page which should now look like:

After you have pasted the "Generated Code", don't forget to close the popup in the API console as you no longer need the code). At this point you can now close the API Console session as you have finished with it).

- o Press the **Auth** button – this will begin an authentication process with Zoho CRM that should deliver an "Access Token" and "Refresh Token". If this authentication is successful, the settings panel will indicate the configuration is complete:

Click **Save** to save the information.

If an error is seen or, for example, you have not used the "Generate Code" within 10 mins of creating it, you can start again by pressing the **Reset** button.

Generic URL

Select >> Settings – 3rd Party Contact data – Generic URL

The generic URL provider simply takes the URL of a web-based service (your company owns / develops / uses) that will attempt the identification of the caller from the incoming phone number in a browser window (to achieve this, the service will typically have a well-known published entry point for the lookup).

Put the web address of your bespoke service in the "Provider URL" field. As part of the URL, you can use "monikers" that will be substituted with the actual phone numbers involved in each subsequent call, in real time. Three monikers are available:

Moniker	Description
[CLI]	the calling number
[CLICALLED]	the "originally called" number - so you can distinguish between calls to, say, a sales or a customer service number that you operate
[CLITARGET]	typically, this is the phone that ends up physically ringing - and will be owned by the person running Desktop Client (often this number will be in a call forwarding group or chain)
[UCALLID]	Unique ID of the call – this is typically a GUID
[CDIR]	Call direction indicator (I or O)
[UQR]	Unique caller ref – only valid for internal directory contacts i.e., real system users. The "Your Ref" field maps onto this.

Any of the buttons will add the moniker at the current cursor position in the text box.

Hypothetical examples of usage could be:
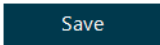
https://secure.resolve.com/phonenumber/[CLI]

… which invokes your service URL with the calling phone number (for customer identification), or, say:

`https://rem.svc.com?cli=[CLI]&via=[CLICALLED]&action=pop&id=[UCALLID]`

… which invokes your service URL with the calling phone number, plus the public facing phone number they called (for example so you can pop the correct sales or support script for your employee to follow), plus a unique ID for the call.

As you can imagine there are lots of potential uses for this feature.

Click [Save] to save the information.

Generic Program

Select >> Settings – 3rd Party Contact data – Generic Program

This option is commonly referred to as the "get out of jail" option. This is because, where we don't support screen pop linkage to a specific CRM system out of the box, it allows 3rd party developers to write a program that can be called by Desktop Client and access the bespoke CRM system directly.

This provider takes the "Program path" to a Windows executable and can pass command line arguments in any form that the Windows executable requires. Using this approach allows any custom integration code to be written in the Windows executable and linked to from Desktop Client. An example of where this would be useful is where a customer makes use of a Salesforce application that has a custom data model (i.e., they don't use the stock objects) and requires bespoke coding on the part of the customer to integrate. Desktop Client can launch that program.

The setup is like that of the Generic URL approach, except you are defining the launch of a Windows program. The same "monikers" are available for use in the "Program args" section of the panel, as shown above.

You can also call the program in response to an outbound event. This allows linkage with CRM systems for outbound campaigns etc.

Click **Save** to save the information.

Call support

This panel supports various options to assist dialling numbers found within other applications, on web browser pages etc. It also allows the enabling of the basic CTI functionality supported by Desktop Client (if the relevant handset hardware /

software also supports the specific CTI capabilities). The user can also configure the ability to access the Quick Call banner from a second system tray icon.

Clipboard dialling

Currently, Desktop Client can offer you the chance to quickly dial a number if it detects one has been put in the clipboard.

So, for example, in a web browser the process involves the user selecting the text (including any country-specific formatting), then pressing either Control-C or right-clicking and selecting Copy like has been done here in Google Chrome:

Call Us

We're open (UK):

Monday to Friday:	8.00am - 8.00pm GMT
Saturday & Sunday:	9.00am - 5.30pm GMT
Bank Holidays:	10am - 4.00pm GMT

UK:	+44 (0) 20 3828 7700
Germany:	+49 (0) 800 182 5200
France:	+33 1 82 88 84 74
US:	1-866-313-2493

At the point the number is copied to the clipboard, Desktop Client will attempt to recognise it as a phone number and, if successful, offer to allow you to dial it using the Click-2-Talk feature.
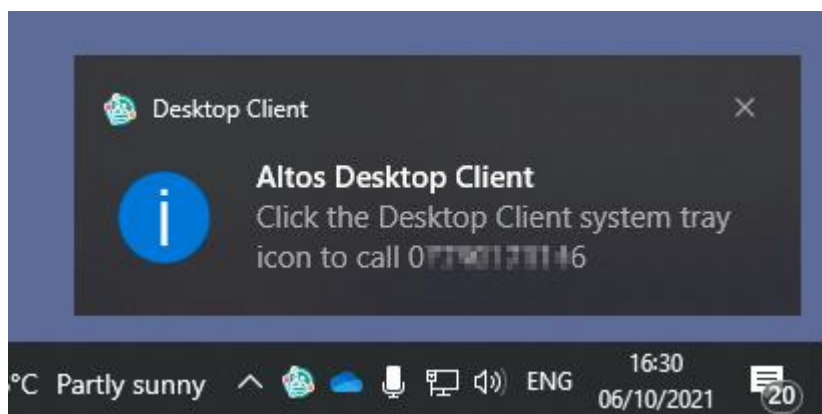
It will also copy it into the text field of the "Call number" window if that is visible.

NOTE: To be able to click on the system tray icon (the Desktop Client icon), you must ensure that Windows has been set to "Show icon and notifications" for Desktop Client in the "Notification Area Icons" section of the Control Panel. If this is not done, the icon may not be visible and, if so, the feature will not work.

Dial hyperlinked numbers

Desktop Client can be set to initiate a call when a hyperlinked number with a format starting sip:, tel: or callto: is clicked in a browser. This facility can be turned off if not required.

NOTE: this only works if Desktop Client was installed under an account with local administrator privileges, since the Desktop Client installation package is required to write to the system registry.

Double click dialling

This feature allows you to initiate dialling without navigating menus. If the system sees a single phone number associated with the contact you are double-clicking on, it will select this number. Otherwise, it will show a context menu with multiple numbers in it to choose from.

Confirm before dial

By default, Desktop Client asks you to confirm you wish to dial from your default phone to the number you have chosen. This confirmation can be turned off, so that a Click-2-Talk operation will not ask for consent before initiating.

Number presentation

The Number presentation "floating window" option is also configurable here. This is off by default but can be switched on, at which point is will appear during Desktop Client start-up.

Show CTI prompts

Switches CTI panel support on / off.

CTI window positioning

If CTI prompts is enabled, this allows the user to select where the prompts should pop. There are 2 options:

- From the bottom-right upwards
- docked to main window

Default Number

For users with more than 1 phone this facility allows the "default phone", the one that is used to make CTI calls, the one on which CTI operations work etc., to be changed. For example, if you have a work desk phone and a (licensed) Softphone on your laptop which you use at home, you can choose to use the laptop to make and take calls when returning home in the same way after hours that you do at work.

"Give it a name"

You can also associate a short, "friendly" name with the selected default phone number to make it more recognisable. E.g., Office phone, Support mobile, Home phone, Softphone etc. You should aim to keep this description to 12-14 characters if possible.

NOTE: To quickly see which your current default phone is, view the About box. This will also show you if the phone is correctly registered (a red label with "NR" means the selected phone is not registered with the system).

In addition, the title bar of several of the main windows will also show (NR) if the default phone you have selected is not registered. It should be appreciated that, if your default phone is not registered with the platform, all calls to the associated CLI will be directed to Voice mailbox associated with the CLI.

Soft Phone

This panel will be accessible in the case where you have the integrated Windows Softphone licensed. The panel supports setting used to control the behaviour of the integrated Softphone:

Call handling options – Call Waiting

With this setting on, if you are already on the phone when another call comes in the Softphone will indicate the presence of a second call. If off, the second call will be redirected to Voice mail.

Call handling options – Auto-answer

With this setting on, any incoming call will be answered automatically without ringing first.

Call quality options – Automatic gain control

Choosing this setting may help call quality, but this is highly dependent on your applicable network environment.

Call quality options – Reduce background noise

Choosing this setting may help call quality, but this is highly dependent on your applicable network environment.

Call quality options – Echo cancellation

Choosing this setting may help call quality, but this is highly dependent on your applicable network environment.

Run in separate window

If selected, this allows the integrated Softphone to run outside of the Desktop Client environment - as a separate window. This allows it to be placed independently of the main application – useful if you want to run the main Desktop Client window minimised while still being able to access the Softphone.

NOTE: Desktop Client will need to be restarted for this change to take effect.

Ring tones – Ring tone folder

Out of the box, the licensed integrated Softphone supports a standard incoming call "tone" which it applies regardless of the nature of the caller. But the Softphone allows you to use your own ring tones if so desired.

These should be .wav files which are loaded into a folder you have previously created locally on your PC. Supply the path to that folder here. Set this first before attempting to set individual ring tones, so that Desktop Client knows where to look.

Ring tones – External calls ring tone

Choose the ring tone played when a call from PSTN or a different company comes in.

Ring tones – Internal calls ring tone

Choose the ring tone played when a call from a colleague comes in.

Ring tones – Forwarding ring tone #1

Choose the ring tone played when a call comes in via a call forwarded number with "distinctive ring tone" set to 1.

Ring tones – Forwarding ring tone #2

Choose the ring tone played when a call comes in via a call forwarded number with "distinctive ring tone" set to 2.

Ring tones – Forwarding ring tone #3

Choose the ring tone played when a call comes in via a call forwarded number with "distinctive ring tone" set to 3.

Startup

This panel supports various options involving application initialisation:

Start when Windows starts

Setting this on allows Windows to start Desktop Client when the user logs on.

Auto-logon if possible

If credentials have been remembered, this will initiate a logon attempt when the program starts. So, if used in conjunction with the above option, this will auto-logon Desktop Client from machine boot up.

Show 'always on top'

Setting this on will ensure My Contacts and My Service panels display on top of other windows.

Main window positioning

Allows the user to set where the Contacts window will appear. Particularly useful for those users with multiple displays.
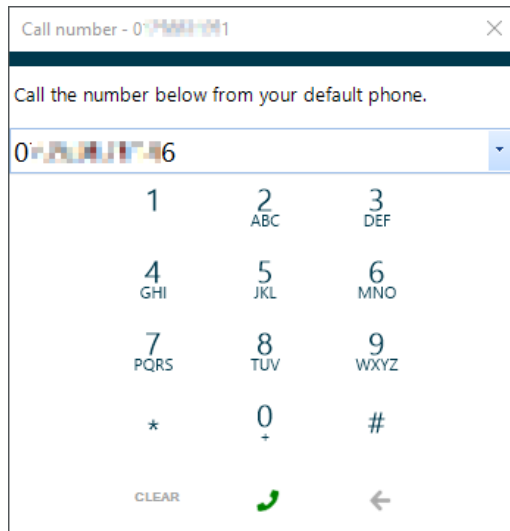
Other

This panel supports miscellaneous options such as presence and licensing:

Change status to away when idle

Setting this option will cause Desktop Client to set your activity status to "away" after a period of inactivity e.g., if you are away from your PC for ~ 10 mins.

Synchronise status with Lync

If enabled (i.e., if the Lync / Skype for Business (SFB) client is detected on your machine) setting this option will keep activity status changes in step with Lync status and vice versa (i.e., you can control your SFB status from your Desktop Client activity status).

Licensing options

Where these licensed features have been added, you are able to choose between:

* Desktop Client Standard (aka Personal)

* Desktop Client Enhanced which is an optional paid-for extra allowing the user to see the call / DND status of colleagues, hold and transfer calls etc.

* Desktop Client Receptionist, which allows the user to manage incoming calls across the site

If the license is changed then, upon saving the settings, Desktop Client will restart.

2.4. Launch Web Portal

Select >> Launch Web Portal

Clicking on this menu item will open the portal website in your default browser, allowing you to logon.

2.5. Click-2-Talk

This feature allows you to click on phone numbers appearing in the Calls Received and New Voice Mails lists and have your phone automatically call them for you.

2.6. Call number

Select >> Call number

You can also initiate Click-2-Talk calls directly using this Desktop Client menu item. It can be used in one of two ways – just click on the 'Call number…' menu to show a panel where you can type in a number. Alternatively, you can first copy a phone number from any web page and subsequently, on clicking the 'Call number…' menu, the panel will show with the number pre-filled.

Note that Desktop Client does its best to interpret the number (removing brackets and other special characters), but you should check it before clicking the icon to begin the calling process.

NOTE: Click-2-Talk is a two-part calling process. First, your "default phone" is called by the system and then, when you answer the phone, the actual target call is placed.

See section 2.3 – "Your Phone Status" for more information about how to set up your default phone if you have not done so already.

2.7. Skype For Business integration

Desktop Client integrates to Skype for Business (SFB) in two ways:

- Activity status and call status can be synchronised between a running Desktop Client instance and a running SFB instance on the same PC. This can be enabled from the Miscellaneous page of Desktop Client settings. SFB must already be running to switch this feature on (otherwise the option is disabled):

- Contacts in SFB with PSTN-based or service-based phone numbers can be called via a running Desktop Client instance on the same PC. When setup correctly, a "Call using Desktop Client" item will automatically appear in Skype for Business context menus that support starting a call.