# Hosted Services - Desktop App

The Hosted Services desktop app is designed to be easy to use on your PC and is made for the end user. Admin functionality can be accessed via the Hosted Services portal. Once you have logged in it will remain up and running for your entire work day.

Log in with your Hosted Services user name and password (same as used when logging into the Hosted Services web portal).

**Home Page**
Once logged into the app, you will be on the home page, where you can see your favorites, coworkers and groups.
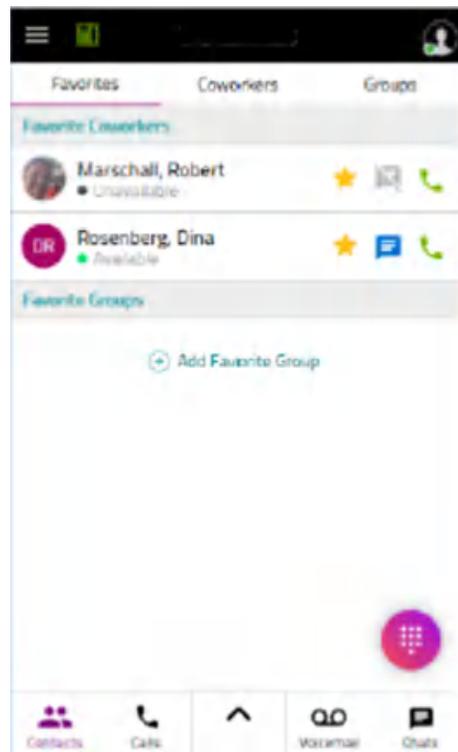


**Favorites**
By each co-worker's name you will see a star filled in gold (this indicates favorite) or not, a chat bubble and a phone handset.

**Chat Presence**
The status for each of the chat bubble variations is:
Blue filled – available to chat
Grey with a line – offline
Red filled – a chat is awaiting me – from someone who is online
White with a red outline – a chat is awaiting me from someone who is offline

**Phone Presence**
The handset indicates your ability to speak on the phone with this co-worker. The status for each variation is:
Green – they are logged in and available to speak
Red – they are logged in and on another call
Grey with a line through the phone icon – they are not logged into an HS phone.

By default, your presence status follows the status of the phone. You can also display other states. In the first picture the phone is green, and it says available (because this user is following their phone status) and in the second picture the phone is green but they used a custom status to say something else.
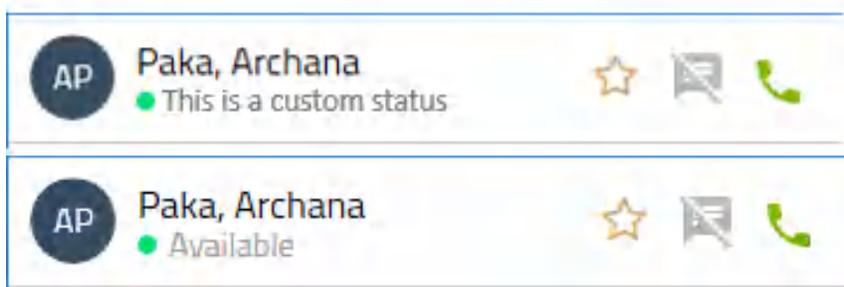


In order to use the click to call feature, you need to have your phone available and logged in. Click on the picture of the handset (click to call). Your Hosted Services phone (this can be your Hosted Services Desk phone, Cordless, PC Console, and Softphone etc.) will ring, then the distant end will begin to ring. They will either answer or you will be sent to coverage. This is no different than if you called from the phone, only now you have the added convenience of doing this all from one place (your desktop).

Item 4 (pic on next page) is Groups
Each member within the tenant can go to this section and create their own groups. The user creating the group becomes the administrator of that group.  Hosted Services Administrators cannot change members of groups; only the user who created the group can add or remove group members.

A user can go to this section and mark a group as a favorite, so it appears on the first screen. They can also see how many groups they are a member of, whether they are the admin of that group or not, who is the group admin, who are the group members and the ability to delete their own groups.

Here you will see a group set up for chat represented by a double chat box. You can click on this and the chat will be sent to the chat members. If the double chat box is red there is a chat waiting for you.

Some notes to remember about chat: The customer can request from their carrier that we completely turn off chat for their tenant (they would still have the desktop app for its other uses). An individual user can remove themselves from chat. In which case they would not participate in chat as a user or within a group.
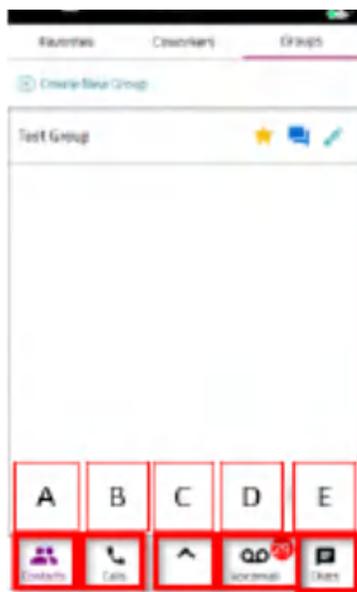
Chats are kept and are only accessible by the user (not by Carrier Admins).

Chats are encrypted.
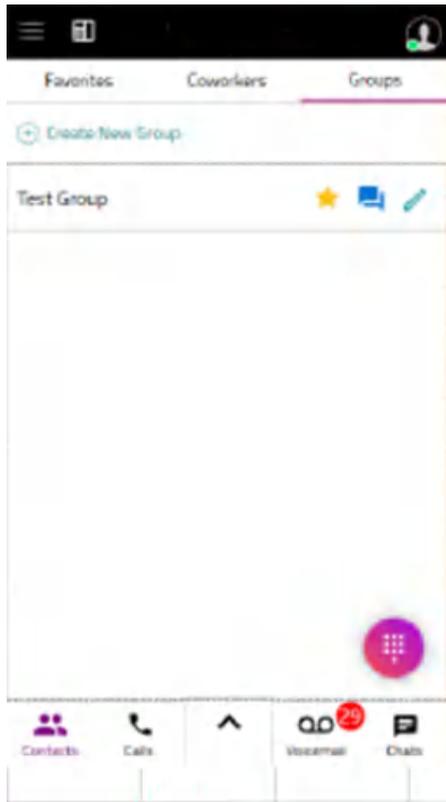
Across the bottom of the Hosted Services Desktop app are links to the following pages: Contacts

A. Contacts
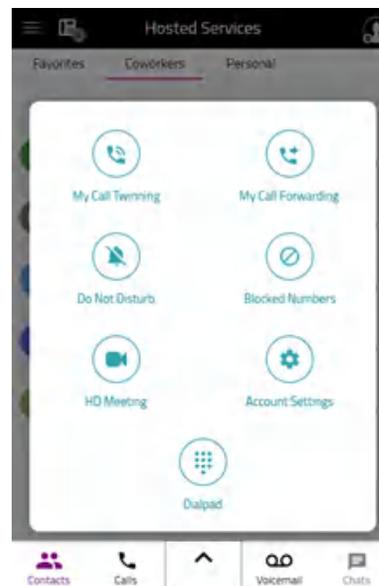B. Calls
C. More Options Arrow
D. Voice Mail
E. Chats



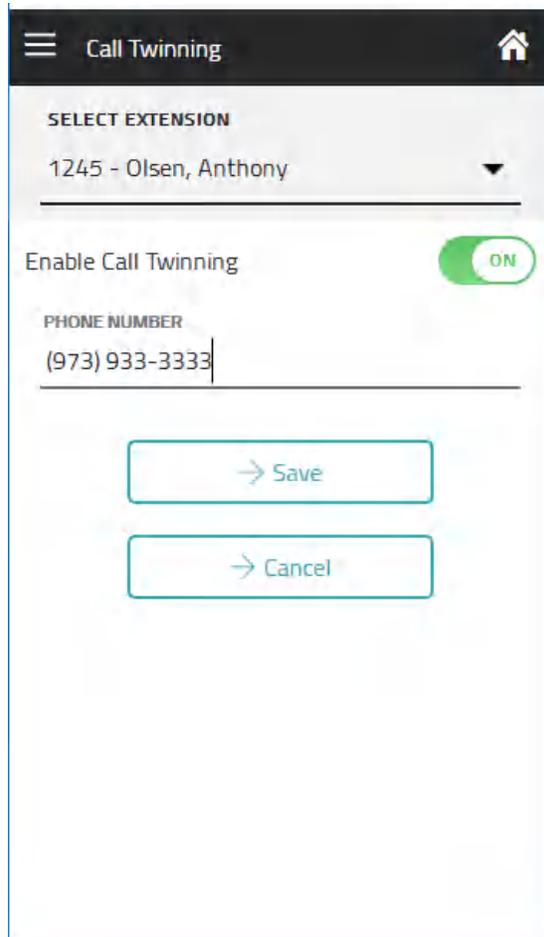A. Contacts reviewed above. Also please see Synching HS Desktop with Office 365 Contacts

B. Calls: you can see the last 25 calls that you made or received, click to call from here or bring up a dial pad and dial a new number directly from the app.
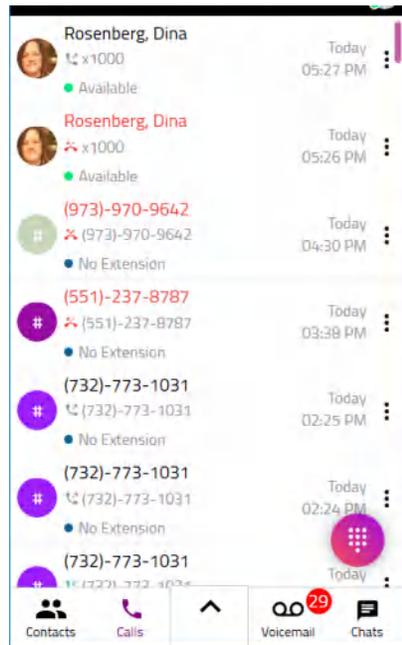


C. Displays the following additional options:

a. **My Call Twinning** – Call twinning lets you take Hosted Services phone calls from another

phone number. The My Call Twinning option lets you turn on/off call twinning and setting your call twinning destination
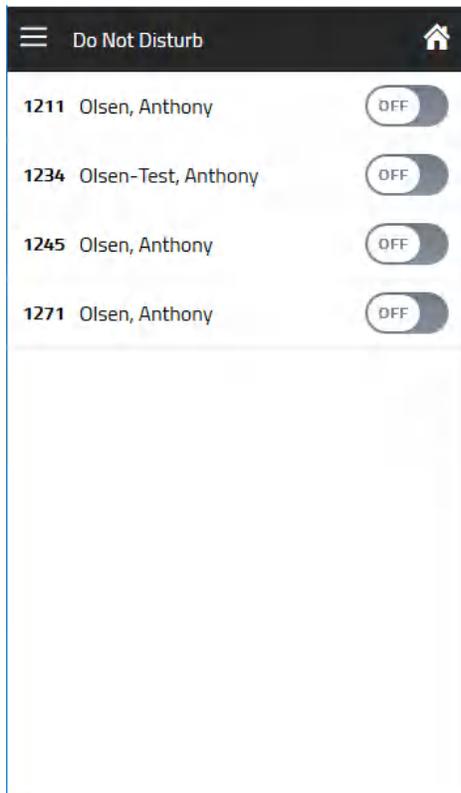
b. **My Call Forwarding –** Opens your call forwarding settings. From here, you can choose

the number of rings that will occur before forwarding a call to call coverage and Choose where calls are forwarded to.
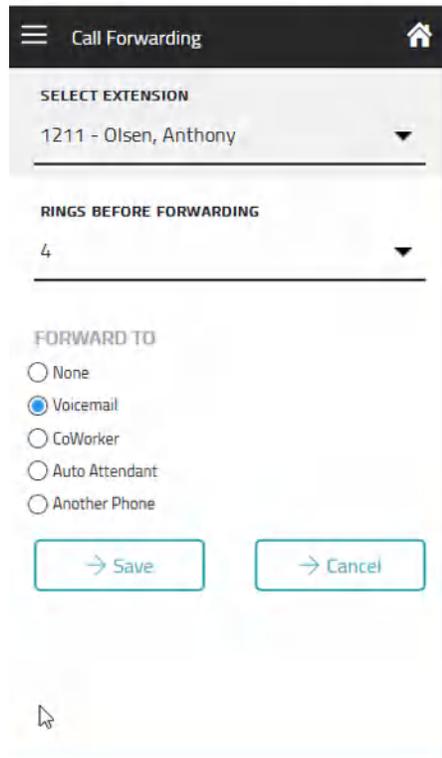
c. **Do Not Disturb –** The do not disturb screen lets you turn on or off do not disturb for any of the extensions associated with your account

d. **Account Settings –** The account settings page lets you change the extension PIN for your Hosted Services extension. The phone PIN is required for signing into Hosted Services desk phones.

e. **HD Meeting –** If you select HD Meeting, the HD Meeting application will open.
f. **Blocked Numbers –** Displays any numbers you have blocked
g. **Dialpad –** The dialpad screen can be reached from both the more options page and from the Dialpad icon on the home screen. If you have the PC Softphone enabled and registered in the Hosted Services Desktop app, you can make calls directly form the Hosted Services app. If not, you can push a call to any Hosted Services phone you are currently logged into.

**Dialpad with the Softphone disabled**
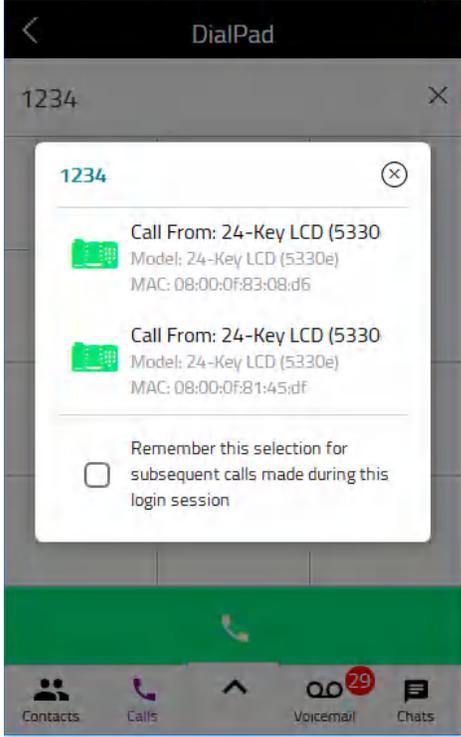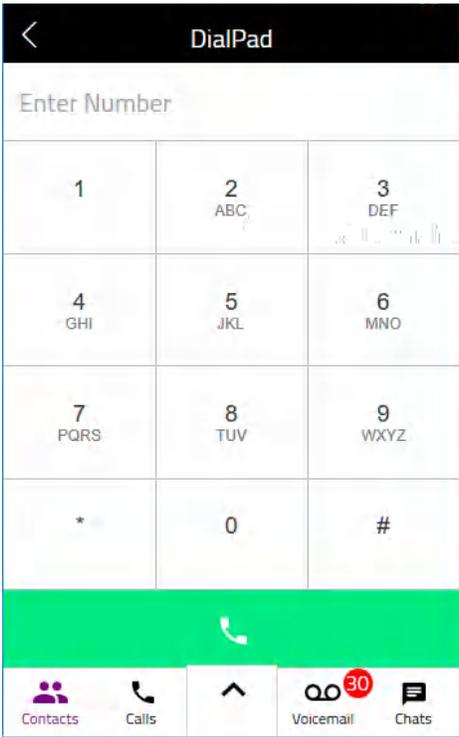


**Softphone dialpad**
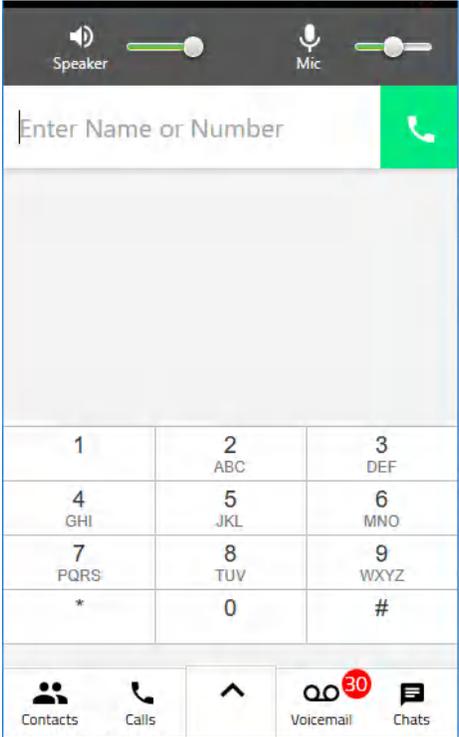
If your system administrator has provisioned you a PC Softphone license, you can select the phone icon in the top left of the screen, which will allow you to make and receive calls from within the Hosted Services Desktop App. To learn how to use the Hosted Services Softphone functionality, please review the **Softphone** section.

D. Voice Mail - you can do the following:
   1. Play the voicemail
   2. Call back the phone number that left the voicemail
   3. Send an SMS to the phone number that left the voicemail. This will only be available if you have SMS enabled on your account
   4. Delete the voicemail
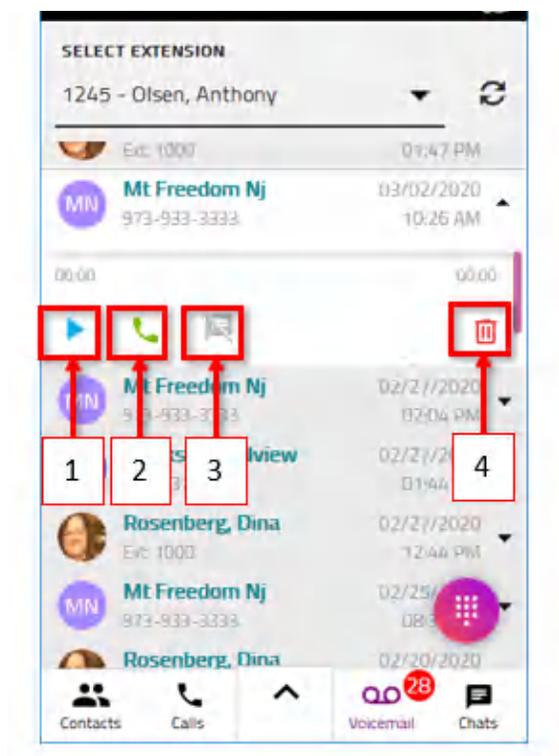


E. Chats – Here you can:
   a. Respond to a chat
   b. Call a Hosted Services user you are chatting with
   c. Delete the chat
   d. Start a group chat
   e. Start a new chat
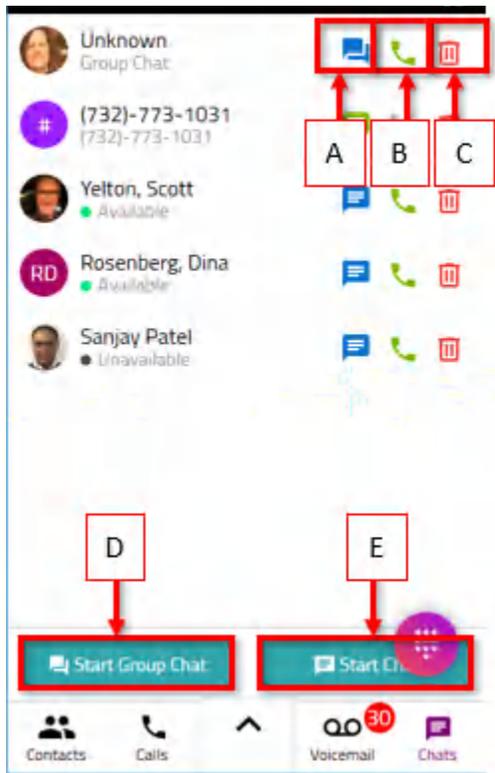
SMS Chat – If a user has been granted SMS text/chat permissions by their Admin, then that user can send SMS messages from their Hosted Services phone number to cell phone numbers and receive messages on their Hosted Services number. SMS Messages will appear with a green chat icon, while Hosted Services chats will appear with a blue chat icon.
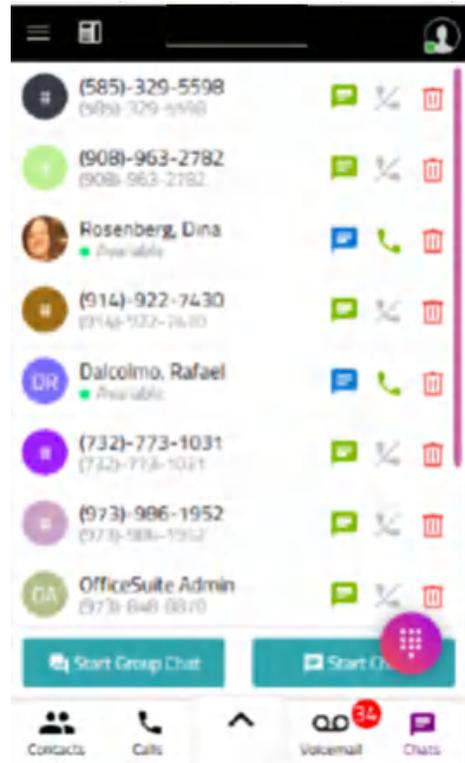
To send a text, click the SMS chat icon for the record you wish and type your message in the box on the next screen. Press Enter or Send.

You can see the whole conversation with the party. When the party replies, it will appear in your Hosted Services app. *Please note that SMS Text does not support sending/receiving multimedia nor does it support group chat at this time.
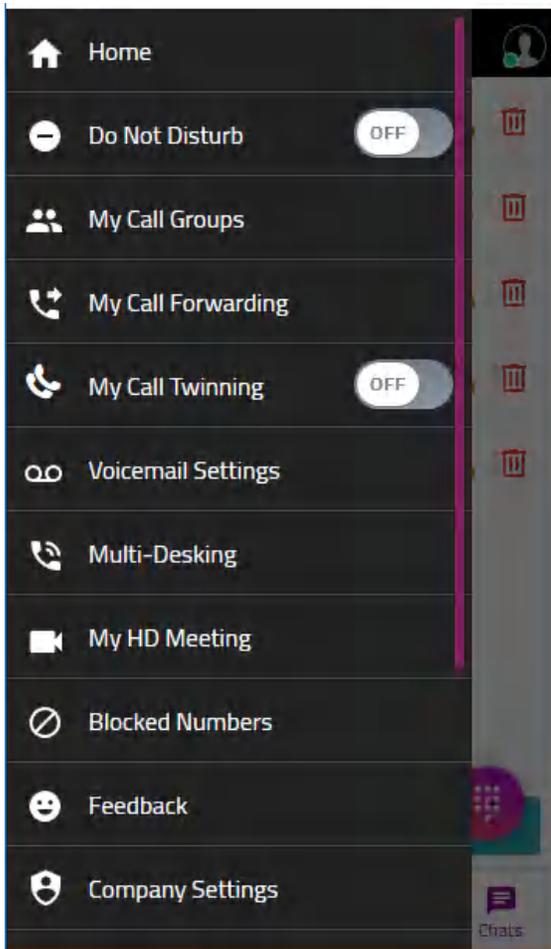
To send a message to a new SMS party, click the **Start Chat** icon.
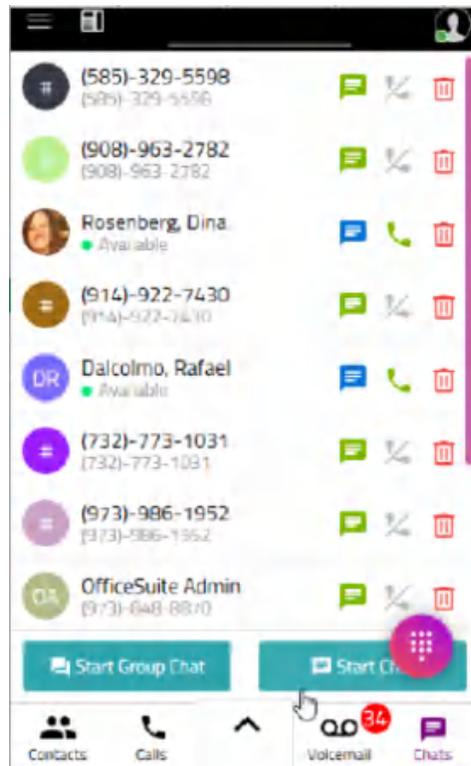
After that, enter the desired DID (including the area code) into the **To:** dialog box.  Once the SMS bubble appears, click on it to initiate a new SMS session.
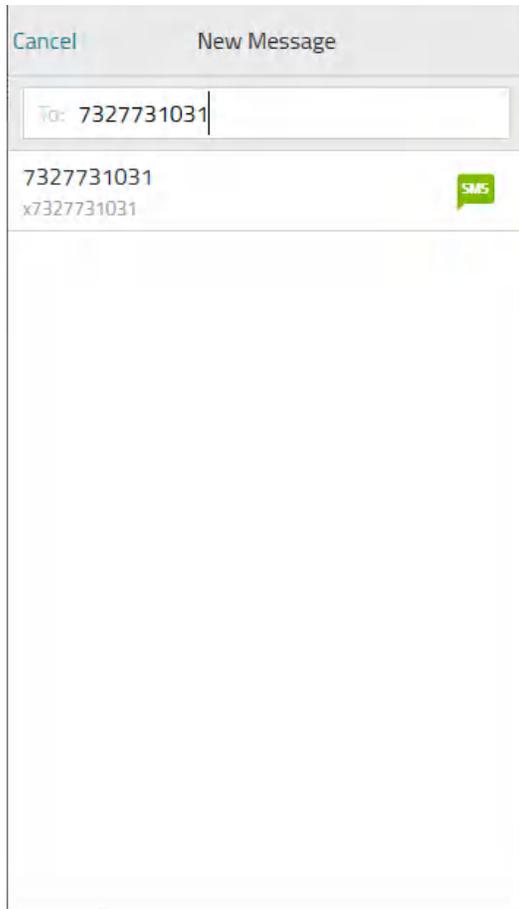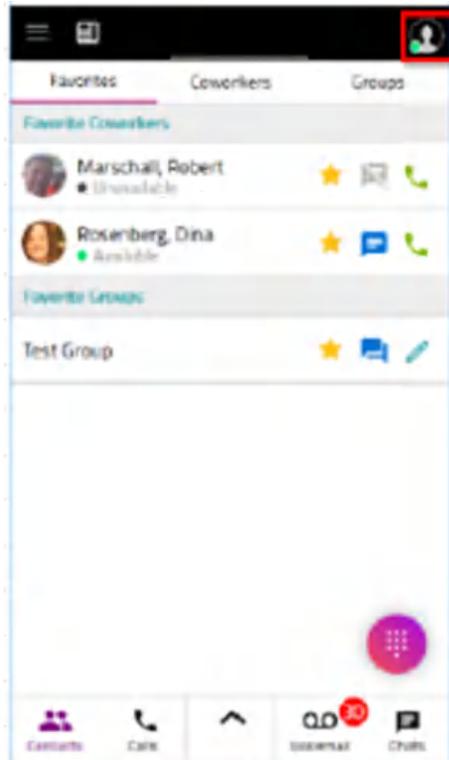
From the chat page look at the hamburger on the top left of the screen. By clicking on the hamburger, then **Home** you will be taken to the main menu.

Home takes you to the first page that we spoke about that shows presence.

If we look to the top right of this page you will see a person with a circle and a bubble

The person will show your phone and chat presence status.

Here you can set your presence status to show to others.

You can choose to have presence follow your phone status (default) or you can put in a message such as; Available, Busy, Away, Out of Office, Be Right Back, Do Not Disturb, Out of Office or create your own custom message.
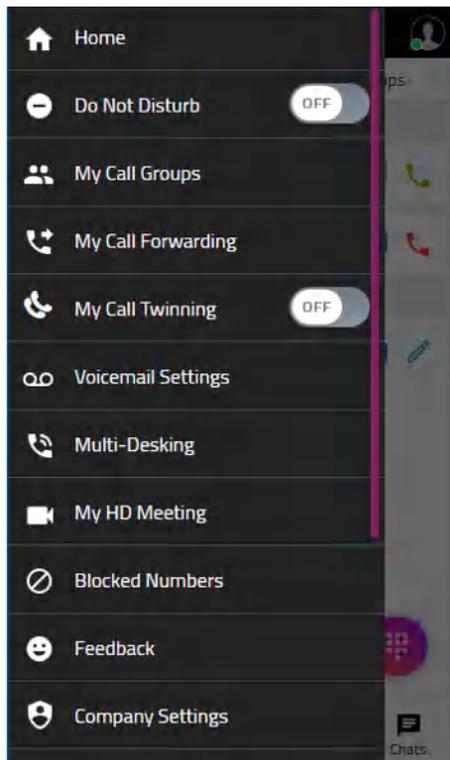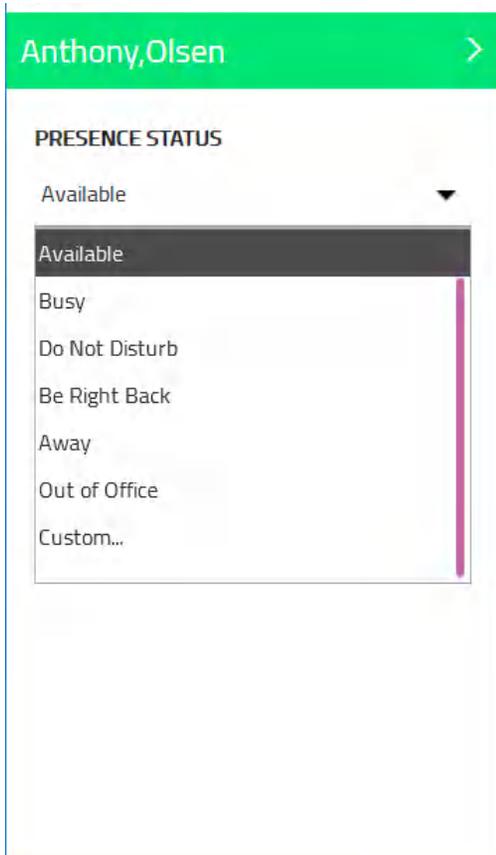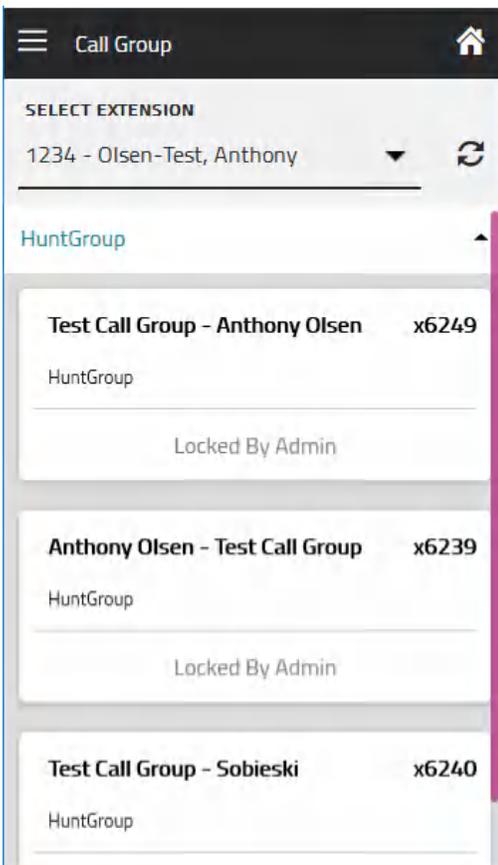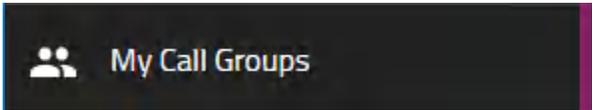
### Do Not Disturb

You can turn this feature on or off from the button or you can click on this section and if you have multiple extensions you can select which one (s) you would like to turn on DND and then save those settings.
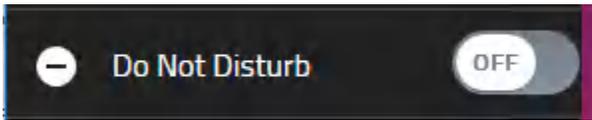


### My Call Groups

This section will display the call groups associated with your extensions





### My Call Forwarding

Here you can set where you wish your calls to go once someone has tried to call you and you were not free to take their call.

Select the number of times your phone will ring (between 1-20) and then they will be sent to coverage. Coverage can be your voice mail, an Auto Attendant (AA), another co-worker's ext., another phone number or no coverage at all.

**My Call Twinning**

You can turn this feature on or off from the button or you can click on this section and if you have multiple extensions you can select which one (s) you would like to turn on My Call Twinning and then save those settings.
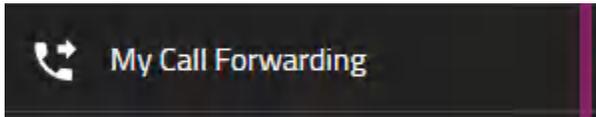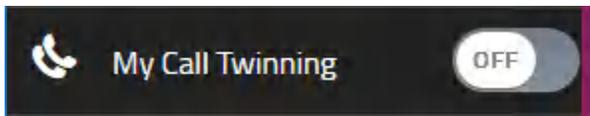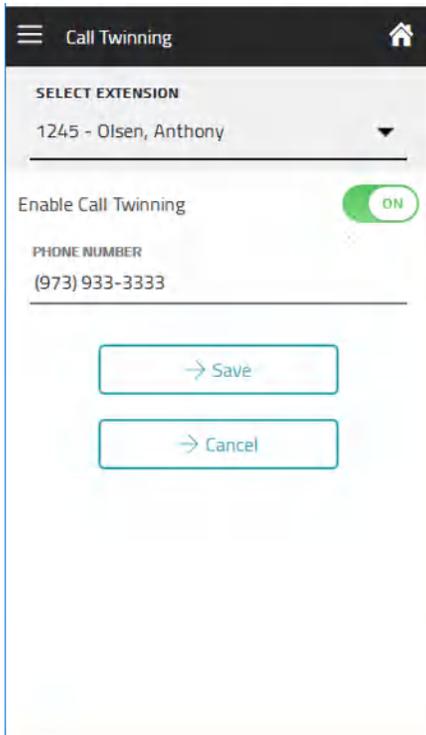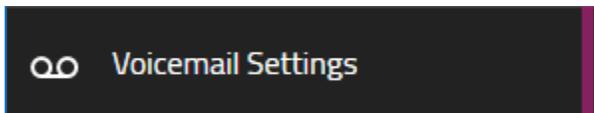
**Voice Mail Settings**

Here you can set the way you wish to be notified about voice mails.



Enable voicemail notifications then select **Add Additional Notification.** Type the email you wish the notification to be sent to in the **Notification Email** field (ten maximum – If more needed the customer can set their own email distro group to send to). Examples of an email address are yourname@yourcompany.com or 2125551000@vtext.com (this would be sent as a text to your cell phone).

Next select the notification type. The choices are audio file only, audio file with transcript, or no audio. Keep in mind that in order to listen to the audio, the device you are opening up the file on must allow for this. Also, transcription is only available if the admin has purchased this item.

You can also reset your voice mail PIN here.

Inside of the Hosted Services portal are two more settings:

1. Just like you can from the Desktop app, you can choose notifications and then voice mail would still be received via the telephone. The difference in the portal is that you can also decide to keep or delete these messages from the voice mail server. If you primarily listen to your messages 'on-the-go' you might opt to delete them from the server so that you don't have to manage them from your physical phone later.

2. Also, you can decide to allow callers the option of not landing in your voice mail and dialing "0". Then you can redirect them to other destinations such as a co-worker, Group or AA.
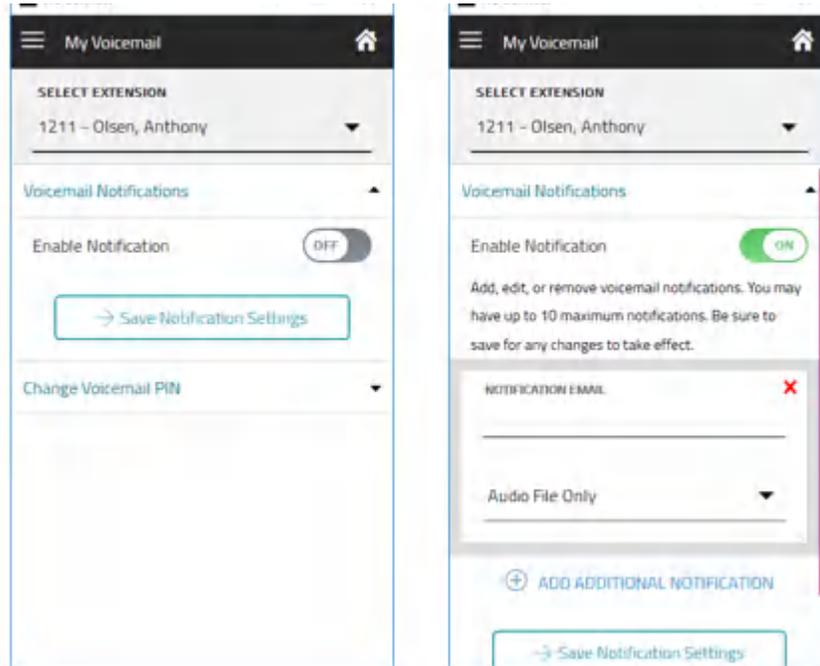


**Multi-Desking**

Hosted Services allows you the ability to be connected to more than one device via the same extension. An admin must turn on this ability.

Once you are logged into more than one device you must determine which device is the click to call originator and the intercom recipient. You can also log out without being near the physical device.
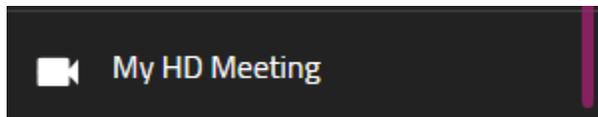
Here you can change these settings at any time.
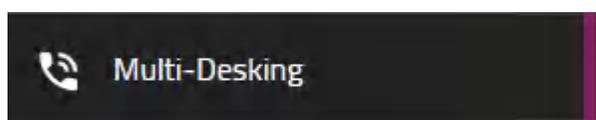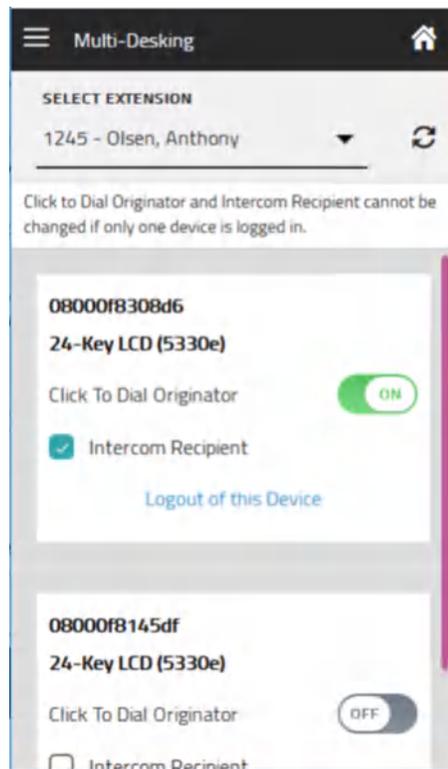
### My HD Meeting

Here you can launch an HD meeting. Your admin must purchase and allocate an HD Meeting license to your account for you to access this feature.



If you do have a license, you need to associate your HD Meeting personal meeting id (PMI) with your email address in order to use the HD Meeting option.  You can do this through the Account Settings >> Hosted Services Settings page within the Hosted Services Portal.

Selecting MyHD Meeting will automatically launch HD Meeting on your computer.

### Blocked Numbers

In the blocked number section, you can manage the numbers you have previously blocked on the calls page.
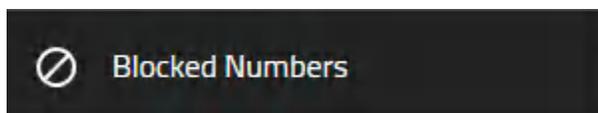
## Feedback

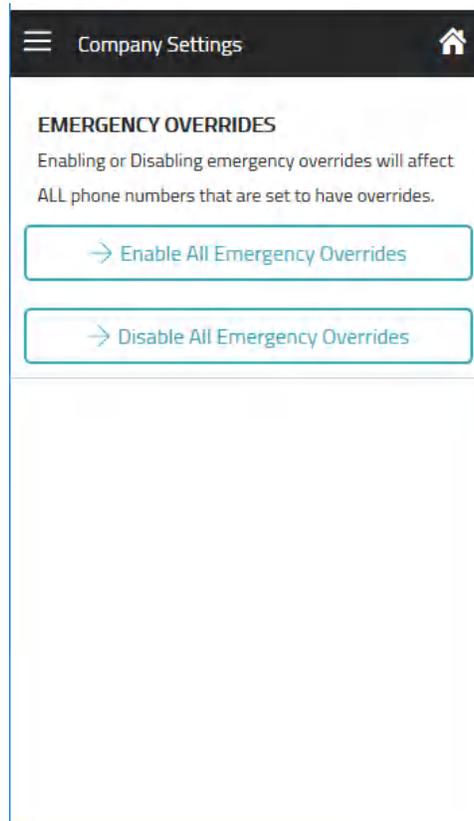The feedback section lets you submit and feedback about the Hosted Services desktop app you may have.
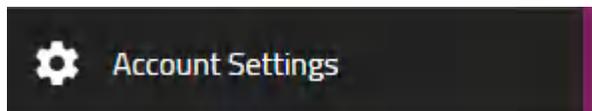
### Company Settings

In Company Settings, an admin can enable or disable all overrides (that were set up on the Incoming Call Routing page within the portal). Admin functionality should be done through the Hosted Services web portal.



### Account Settings

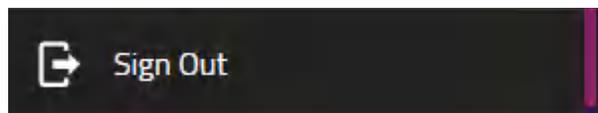In the Account Settings page, you can change your extension's PIN.

**About Hosted Services**

Select the About Hosted Services section to view which version of the Hosted Services desktop app you are running.



**Sign out**

Allows you to log out of the application. This takes you back to the log in screen.



**Notes**

Once you leave the home screen, each page has a button at the top right in which you can return home.



You can be simultaneously be logged into the desktop app, mobile app and web portal.

**Using the Hosted Services Desktop Softphone**

The Hosted Services PC Softphone is an additional feature that is part of the Hosted Services Desktop App. To use the Hosted Services PC Softphone, you must have the following:

- A Hosted Services account with a PC Softphone license assigned to it (if you do not have a PC Softphone license, your system administrator can assign one to you).
- The Hosted Services Desktop App

1. After you have logged into the Hosted Services Desktop App, select the softphone icon in the top left corner.
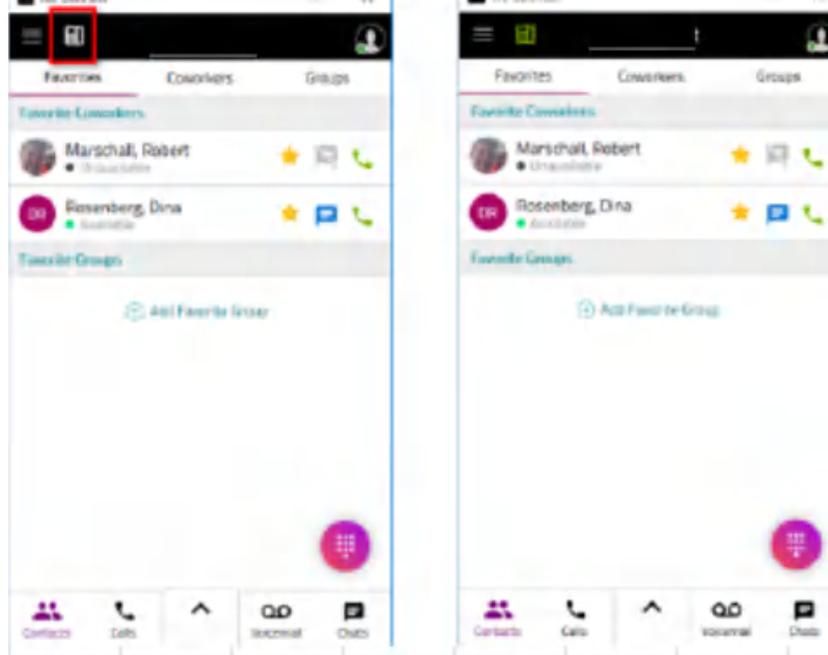
## Making an Hosted Services call

You can make an Hosted Services call from the following screens:

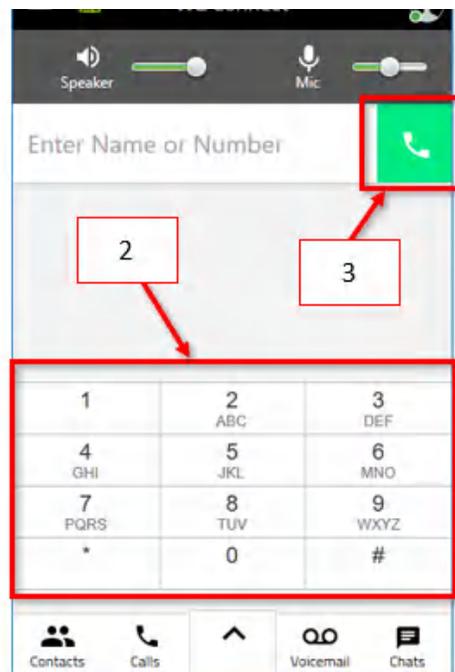- Call from the dial pad
- Call from a contact
- Return a call from the call history

## Make a call from the dial pad

1. Open the dialpad by selecting the **Dialpad** icon
2. Enter the number you wish to dial.
3. Select the green phone button at the top right of the screen.
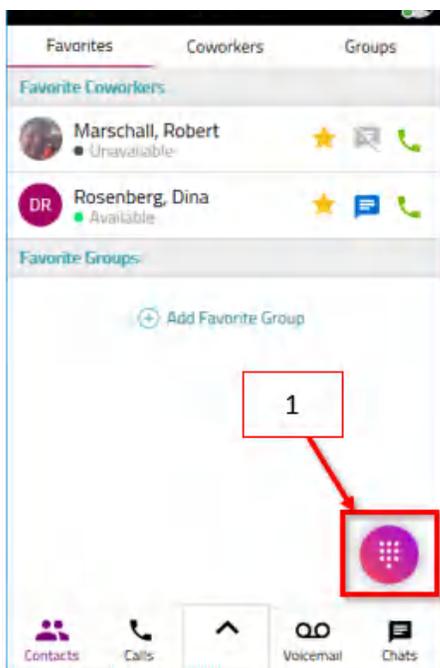
**Call from a contact**

1. From the Hosted Services Home screen, select the **Contacts** icon in the bottom left corner.
2. Select the type of contact you want to call (Favorite, Coworkers, or Groups).
3. Select the phone icon next to the contact to begin the call.
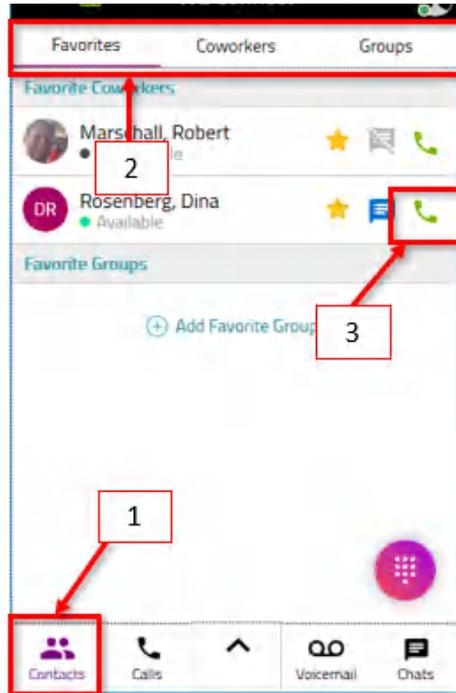
1. From the Hosted Services Home screen, select the **Calls** tab.
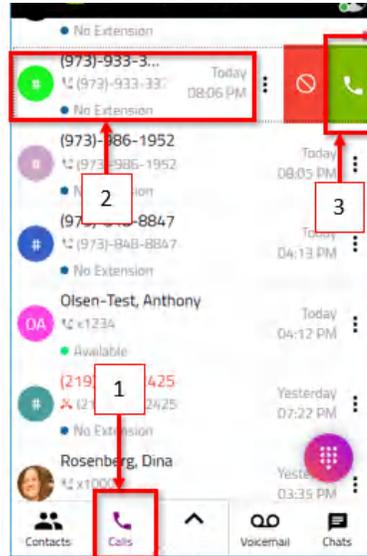2. Select the number you want to call
3. Choose the **Call** button to begin a call. If you wish to not receive any future calls from this number, you can select **Block Number**



## Managing a Softphone Call within the Hosted Services Desktop App

Once a call begins, you will have the following options:



1. **Speaker**– Places the call on mute. Once pressed, the icon will turn red and not sound will be heard from the call.
2. **Call Volume** – Determines the volume of the call.
3. **Mic** – Turns on or off the mic. Once pressed, the icon will turn red and no audio will be sent to the other party.
4. **Mic Volume** – Determines how loud your mic volume is projected to the other party.
5. **Hold** – Will place the call on hold.
6. **Transfer** – Will open a new menu for transfer call options.
7. **Add a call** – Creates a second call, from which you can form a conference call.
8. **End Call** – This ends the call with the other party.
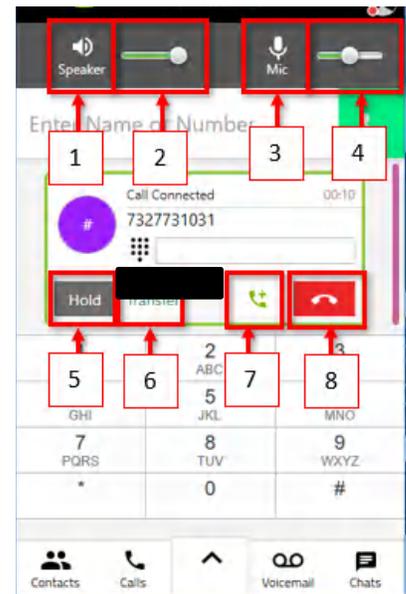
## How to Transfer a Call

There are two types of call transfers: blind transfer (transfer now) and warm transfer (call first). A blind transfer is a transfer that is completed without talking to the third party that the call is being transferred to. A warm transfer is when you connect with the party you are transferring the call to prior to completing the transfer.

**How to Make a Blind Transfer**

1. Start your call with the first party and select the **Transfer** icon.

2. Type the name or number you want to transfer to in the **Enter Name or Number** textbox.
3. Select the drop down arrow.
4. Select the **Transfer Now** button.
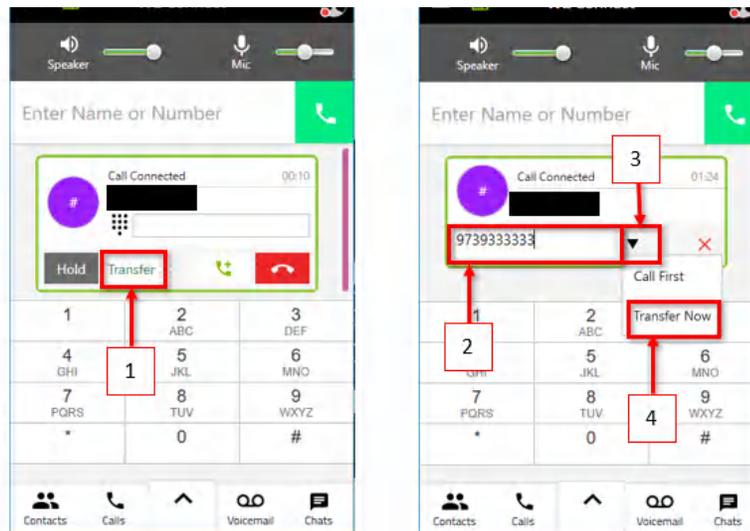


**How to Make a Warm Transfer**
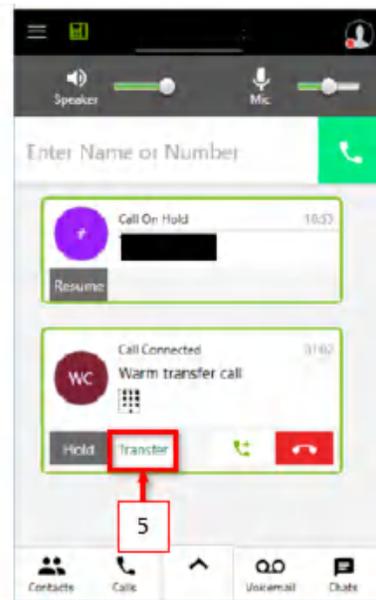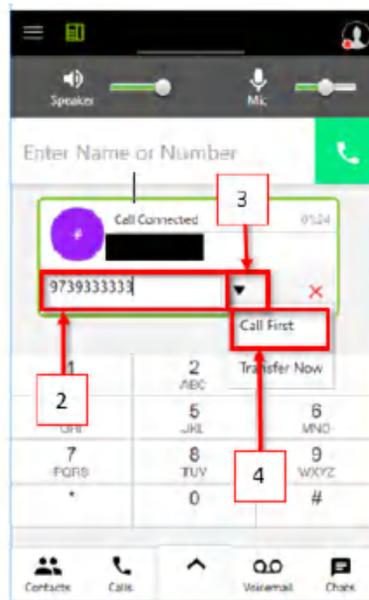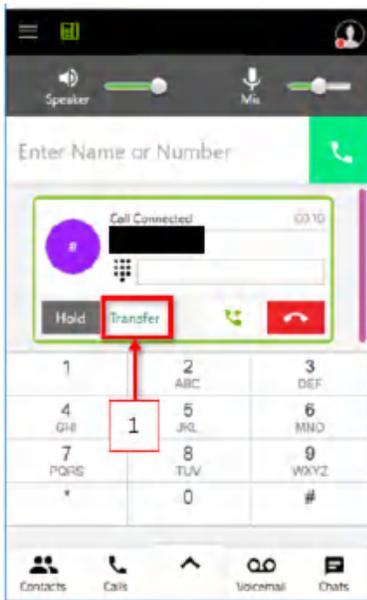1. Start your call with the first party and select the **Transfer** icon.
2. Type the name or number you want to transfer to in the **Enter Name or Number** textbox.
3. Select the drop down arrow.
4. Select the **Call First** button.
5. The second call will begin, placing the first call on hold. Select the **Transfer** button to complete the call.
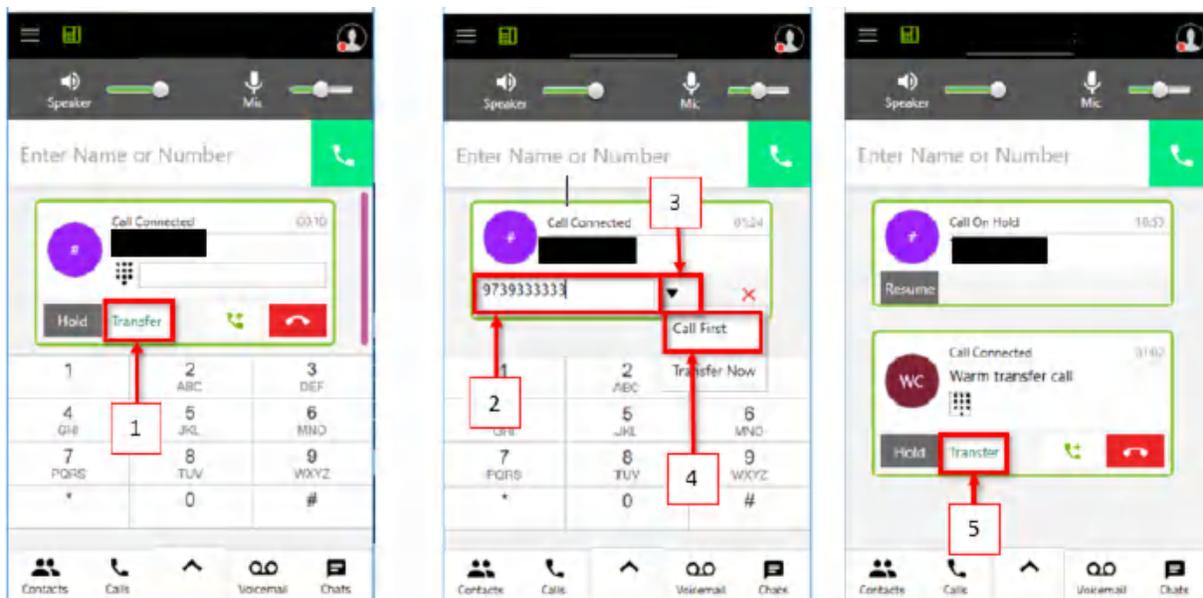
### How to Check your Voicemail

1. On the Hosted Services homepage, select the Voicemail tab.
2. Select the voicemail you want to listen to. You will have the following options for your Voicemail.
   1. Play the voicemail
   2. Call back the number that left the voicemail
   3. Message back the user. This icon will only be available if the number can accept messages.
   4. Delete the voicemail
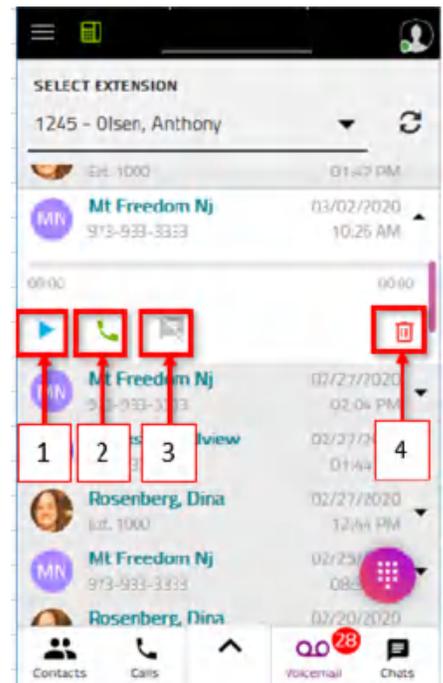
**Office 365 integration with the Hosted Services app -** Provides a way for customers to sync their Office 365 personal contacts so that they can accessed directly from the app.

- **Call or SMS (when available) Office 365 contacts –** Quickly and easily call your external contacts from the Hosted Services Desktop App.
- **Sync contacts between Office 365 and Hosted Services** - Avoid inaccurate data between two contact solutions. All contacts are housed within the Office 365 database, so they can never be out of sync.
- **Create a new Office 365 contact directly from within the Hosted Services app** –Create a contact within the Desktop app and to appear in both the HS Desktop app and Office 365. Create contacts from the Contacts, Calls, Chats and Voicemail tabs.
- **Shortcut directly to editing or deleting a contact from Hosted Services to Office 365** – Due to security reasons, we do not allow editing or deleting contacts from within the Hosted Services app, but users can access their Office 365 account directly from the Hosted Services Desktop app.

A customer must have the following:

- A Hosted Services account
- A Microsoft Office business or school account. You cannot use a personal Outlook account to login at this time.

**How does Office 365 contact integration work?**

Customers can sync their personal contacts using the following steps:

1. Sign into the WE Connect App and go to the **Contacts**



2. Select the **Personal** tab across the top of the app**.** Select the **"Link your Microsoft Office 365 Account"**



3. Once selected, you may be prompted to sign into the Hosted Services Portal. Once signed in, you will receive a pop up in Chrome confirming you have linked your account successfully. You can close out the confirmation screen within Chrome.
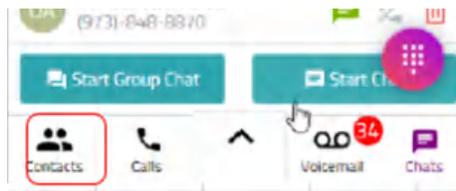
To call a contact, simply select the contact and choose the phone icon for the phone number you want to call.