



## Sangoma Softphone Guide

Overview	3
Downloading Sangoma Softphone Client	4
Logging into Sangoma Softphone Client	4
Setting E911 Location	4
Sangoma Softphone Client Control Panel	5
Binding	5
Binding a device	5
Answering and Placing a Call	6
Answering a Call	6
Placing a Call	6
Placing an Internal Call or Call an Existing Contact	6
Hold, Transfer and Park	7
Placing a Call on Hold	7
Transfer a Call	7
Blind Transfer	7
Transferring a Call to Voicemail	8
Parking a Call	8
Picking up a parked call	8
Merging two calls	9
Voicemail	10
Initial Voicemail Setup	10
Retrieve Voicemail	10
My Favorites	11
To locate a contact within My Favorites	11
To add a contact to My Favorites	11
Chat	12
Direct Message	12
Chat Room	13
Status	13
Additional Features	14



# Sangoma Softphone Guide

Call Log	14
Mute	14
Settings	14
General	14
Audio Settings	14
Chat Settings	14
Idle Settings	14
Call Pop up Settings	14
Queues	15
Profile	15



# Sangoma Softphone Guide

## Overview

The purpose of this document is to help walk you through the features and functions of the Sangoma Softphone Client.

We're here to help! If you have any questions about this or any other process please reach out to us at [support@datacommplus.com](mailto:support@datacommplus.com).

## Sangoma Softphone Guide

### Downloading Sangoma Softphone Client

The first step will be to download the client to your desktop.

- Navigate to <https://github.com/sangoma/desktop-softphone/releases/latest>
- Select the appropriate download based on your computer's specifications

### Logging into Sangoma Softphone Client

- Open the client by selecting the icon on your desktop or start menu
- Fill in the following fields with the credentials provided in the User Details document
  - Host
  - Username
  - Password
- Select Login

### Setting E911 Location

This is very important that you set the proper E911 Location in the system right away

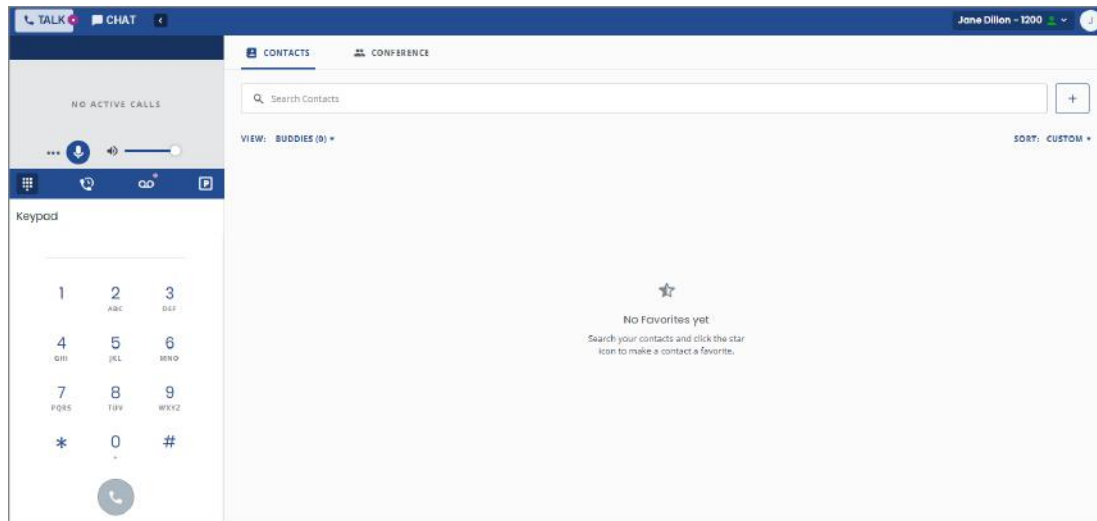
1. Navigate to Settings by clicking on your name in the upper right corner
2. From the drop down menu select Settings
3. You will see Emergency Location under General Settings. From the drop down menu select the location you are at.

4. You can then select ESC or the X at the top of the window.

**\*\*MAKE SURE TO CHANGE YOUR LOCATION IF YOU MOVE TO ANOTHER SITE\*\***

## Sangoma Softphone Guide

### Sangoma Softphone Client Control Panel

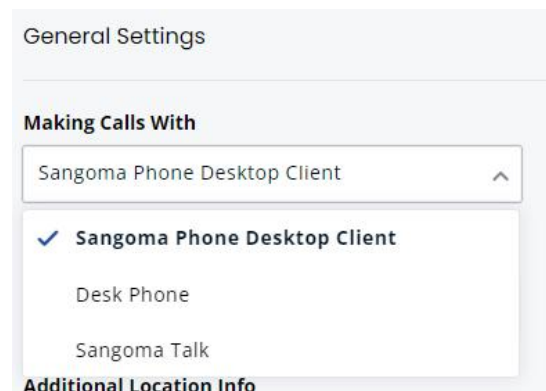


### Binding

Binding is the ability to assign a variety of audio devices that can work with Sangoma Phone Desktop Client.

#### Binding a device

1. Navigate to Settings by clicking on your name in the upper right corner
2. From the drop down menu select Settings
3. Under General Settings select Making Calls with, a drop down menu will appear. Select the device option you want to bind
  - Sangoma Phone Desktop Client
  - Desk Phone
  - Sangoma Talk - through your mobile device

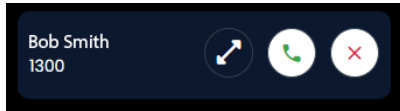




## Sangoma Softphone Guide

### Answering and Placing a Call



#### Answering a Call

When a call comes in, there will be a pop-up with an Answer and Decline option.



- Answer: Select 
- Decline: Select 
- To open the control panel: Select 

#### Placing a Call

- Select the *Dialpad* icon  within the toolbar
- Dial the external number (including the area code) of the party you wish to call and press the send button 

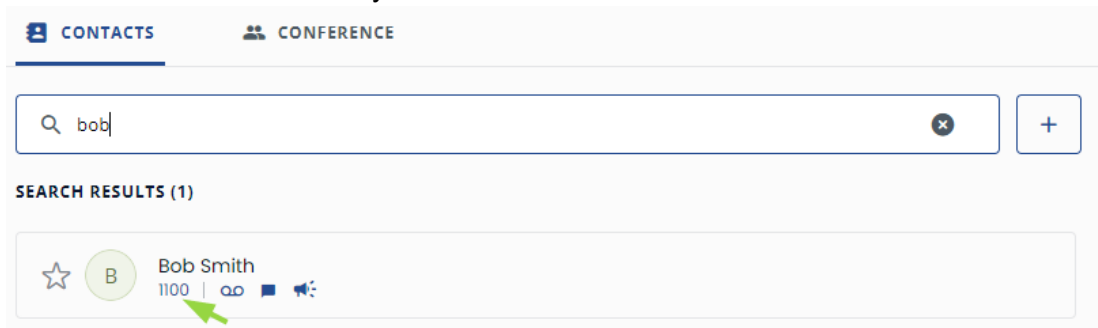
*No prefix is required when placing an outbound call*

#### Placing an Internal Call or Call an Existing Contact

- Select the Contacts tab at the top of the window



- Type in the extension or name of the contact you want to reach in the Search Contacts field
- From the results select the extension or phone number of the person you want to call. The call will dial automatically





## Sangoma Softphone Guide

### Hold, Transfer and Park

Hold, transfer and park functions will appear once you are on a live call.

#### Placing a Call on Hold



It is best practice to put a call on hold if you are the only user retrieving the call, otherwise follow the steps below for either parking a call or transferring a call.

- While on a call, press the *Hold* icon 
- The *Hold* icon will change to *Resume* and illuminate white while active.
- To resume the call select the *Resume* icon. 

#### Transfer a Call

##### Blind Transfer

To transfer a call directly

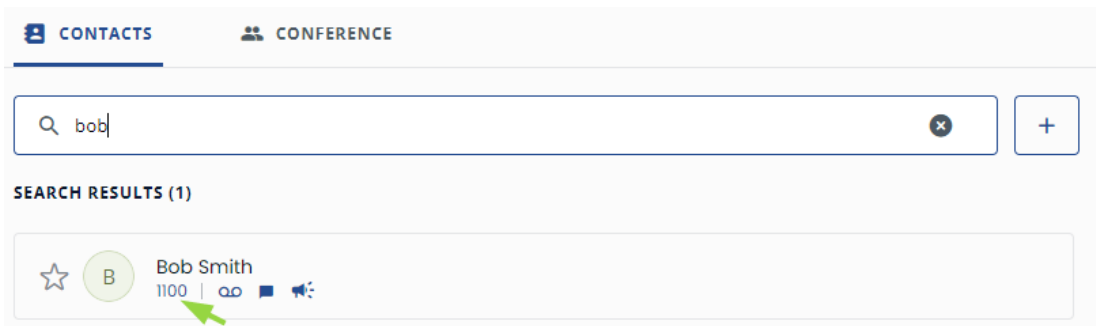
- When on a call, select the *Transfer* icon . The caller will hear music
- You will be presented with a keypad where you can dial the extension\* of the person who you wish to transfer to.
- Select the *Transfer* icon within the dial pad once you have dialed the extension. 
- The call will be transferred.

\* If you do not know the extension

- Select the Contacts tab at the top of the window




- Type in the extension or name of the contact you want to reach in the Search Contacts field
- From the results select the extension or phone number of the person you want to call. The call will be transferred.



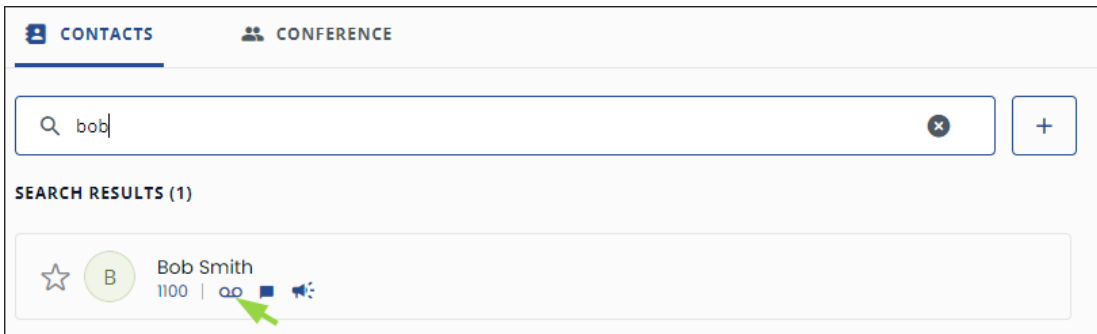
## Sangoma Softphone Guide

### Transferring a Call to Voicemail

- When on a call, select the *Transfer* icon . The caller will hear music
- Select the Contacts tab at the top of the window




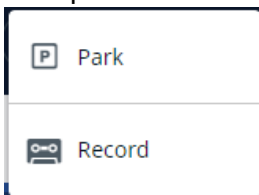
- Type in the extension or name of the contact you want to reach in the Search Contacts field
- From the results select the voicemail icon of the person you want to call. The call will be transferred to their voicemail.




### Parking a Call

Call Parking is a type of Call Holding. When you park a call, that call can be picked up from ANY phone on the system. If a call is put on hold, you can only pick the call up from that phone.

- While on a live call, select the *More* icon 
- A drop down menu will appear, select the *Park* option



- The call is now parked and a dot will appear on the *Park* icon  within the toolbar of the web client
- Communicate that a call has been parked to whom you would like to answer the call

### Picking up a parked call

To pick up a parked call

- Select the *Park* icon  within the toolbar of the web client
- Locate the call within the panel



## Sangoma Softphone Guide




- Select the parking spot number the call was parked in

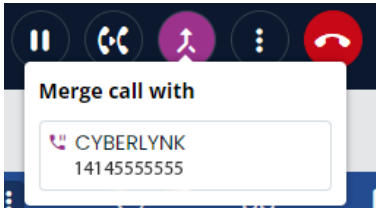


- You are now connected to the caller

### Merging two calls

When on a call you can merge another call in so you are now on a conference call.

- While on a call, press the *Hold* icon 
- The *Hold* icon will change to *Resume* and illuminate white while active.
- Select the *Dialpad* icon  and dial the extension or phone number of the person you would like to add to the call.
- Once the call has been answered the *Merge* icon will be available. Select the *Merge* icon .
- A drop down option will then appear with the call on hold. Select that call to merge the phone calls together.



- The calls are now merged
- Select the Conference tab to control the call





- Mute the callers
- Remove the callers from the conversation
- End the conference call

## Sangoma Softphone Guide

### Voicemail


View personal and group voicemails by selecting from the dropdown menu. You may also forward the voicemail to another user, save it, delete, and mark it as read or unread

### Initial Voicemail Setup

1. Select the *Dialpad* icon 
2. Dial \*97 and the *Send* button 
3. Enter your PIN (upon initial login, your voicemail PIN should be your extension number)
4. Setup the following:
  - o Recorded Name
  - o All Greeting(s)
    - i. Unavailable Greeting: Default greeting, used if you don't answer the phone.
    - ii. Busy Greeting: Used when you are on the phone or DND (do not disturb) is enabled.
  - o New PIN number (Do not use your extension number as a new PIN)

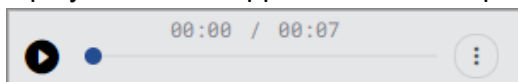
### Retrieve Voicemail


A dot will appear on the *Voicemail* icon  within the toolbar to let you know a voicemail is waiting for you.

1. Select the *Voicemail* icon  within the toolbar
2. A panel will appear showing names and voicemail messages
3. A new voicemail message will have a dot next to it



- o If there is a + next to the name you can click on the + to add them to your Contacts
4. To hear the message click on the name, not the phone number. If you click on the phone number you will be calling the person back.
5. A play button will appear. Select the play button to hear the message.



6. Select the *More* icon  to either delete the email or mark it as unread

## Sangoma Softphone Guide

### My Favorites

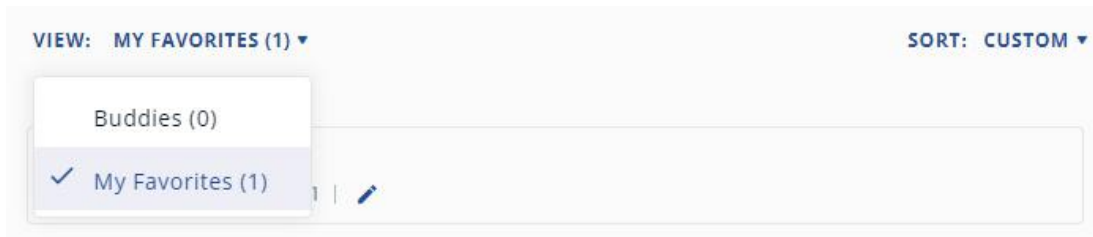
List of contacts you wish to have as favorites.

To locate a contact within My Favorites

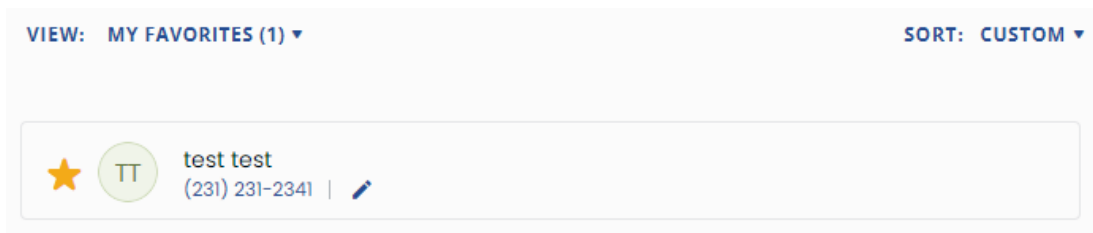
- Select the Contacts tab



- Select the arrow next to VIEW: and select My Favorites from the drop down list



- You will then see your list of Favorites




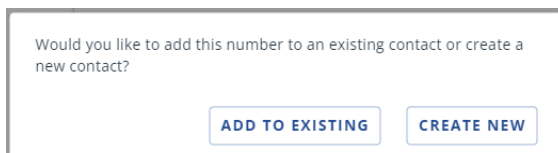
### To add a contact to My Favorites

We will take you through the process of adding a contact and then marking it as a favorite.

- Select the Contacts tab



- Select the *Create Contact* icon 
- A popup window will appear asking if you want to add a phone number to an existing contact or create a new contact, select Create New



- A popup window will appear  
Fill out the following fields
  - First Name
  - Last Name

## Sangoma Softphone Guide

- Label - you can create multiple contacts by selecting the button
  - Business
  - Mobile
  - Home
  - Other
- Select Favorite
- Once you have completed all the contact information select Save

The screenshot shows a 'Create New External Contact' dialog box with the following fields and controls:



- First name:
- Last name:
- Default:
- Label:
- Number:
- Favorite:
- Buttons: BACK, CANCEL, SAVE

- You will then see the contact appear on your My Favorites screen - it will take a moment to process

## Chat

You can send direct messages to a coworker or create a chat room through Chat.

## Direct Message

- Select the Chat button 
- Click on the  button to start a conversation
- Type in the name of the person you would like to send a message to in the search field

The screenshot shows a 'New Chat' dialog box with a search field containing the text 'Find or start a chat'.



- Select the name from the results

The screenshot shows the 'New Chat' dialog box with the search field containing 'Jane Dillon' and a green 'Go' button.

- Click on the Go button
- You can now start your conversation

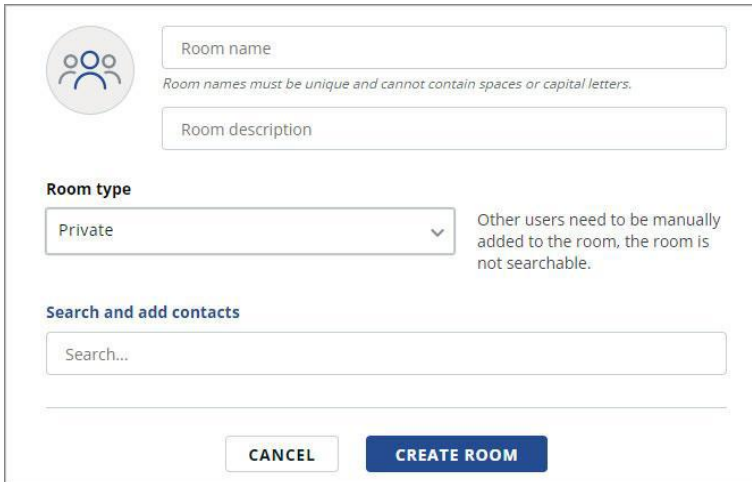
## Sangoma Softphone Guide

### Chat Room

- Select the Chat button 
- Click on the  button to start a conversation
- Select Create a Room button



- Fill in the fields on the New Room window

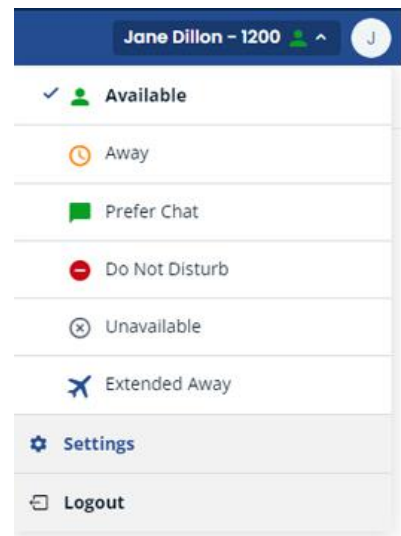
A screenshot of the "New Room" window. It features a circular icon with three people, a "Room name" input field with a note "Room names must be unique and cannot contain spaces or capital letters.", a "Room description" input field, a "Room type" dropdown menu set to "Private" with a note "Other users need to be manually added to the room, the room is not searchable.", a "Search and add contacts" section with a "Search..." input field, and "CANCEL" and "CREATE ROOM" buttons at the bottom.

- Private - Room cannot be found in searches
- Public - Room can be found in searches
- Select Create Room button
- You can now start your conversation

### Status

You can set your status up so others can see if you are available.

- Select your name in the top right corner.
- A drop down list will appear
- Select the Status you would like to set yourself at
  - Available
  - Away
  - Prefer Chat
  - Do Not Disturb
  - Unavailable
  - Extended Away
- The icon next to your name will update to that status



### Additional Features



#### Call Log

Shows call history and internal user chat history



#### Mute

Select to mute and unmute yourself

### Settings

You can customize several other areas through the Settings window.

#### General

- Making Calls With
- Emergency Location
- Additional Location Info - not active as of yet

#### Audio Settings

- Microphone
- Speaker
- Ringer
- Ringer Volume

#### Chat Settings

- Chat Order
- Chat Notifications
- Include Chat Messages
- Mobile Notifications

#### Idle Settings

- Change Status When Idle
- Idle time in Minutes
- Change Status to option

#### Call Pop up Settings

- Currently not active

# Sangoma Softphone Guide

## Queues

- Audio Alerts for Threshold Triggers

## Profile

- Logout from Current Session

If you need further assistance, please reach out to us at [support@datacommplus.com](mailto:support@datacommplus.com). Once we receive your request one of our representatives will get back to you as soon as possible to help you with any of your phone system needs.