CLIENT COMPANION APP END USER GUIDE

INTRODUCTION

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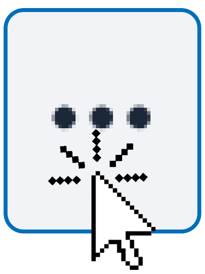
WELCOME TO THE APP USER GUIDE.

The product is designed to be intuitive and user-friendly, however, this guide covers all the major features for ease of reference



- Unless otherwise stated, click and click on means a single left-click or tap.
- Items in **bold text** indicate an interactive feature or user action.
- The term **three dots icon** is used to describe the expanded menu button:

GETTING STARTED

LOGIN AND LANDING PAGE

DESKTOP VERSION ONLY

Pinning the app to your Teams client

The setup process automatically applies the app to your Teams client.
You can select the app from your Teams app gallery and pin it to the Teams app area.

The gallery is accessed from the *three dots menu* button in the Teams client Apps gallery under the **... More** added apps section.

Select the app and click **Open**. You will then see the app icon added to the Teams bar.

Tip: Right-click on the app icon to permanently pin it to the Teams apps bar.

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GETTING STARTED

To use the app, simply launch your Teams client and go to the **added applications tab.**

Click on the **app icon** in the sidebar.

*You may need to click **Sign in with Microsoft** and use your credentials - If you don't have an active license assigned to your account, contact your administrator.*

By default, the app landing page is displayed:

- On the left is the **Contacts/Call History pane** - use this to find contacts.
  - At the bottom of this is your **User ID** which shows your **name** and **contact number**
- To the right is the **Dial pad** - use this for making calls. See **Making and Taking Calls** for more information.

MAKING AND TAKING CALLS

THE BASICS

Making calls using the dial pad

Use the dial pad to enter the number to call, or enter the number using your keyboard.

Click the **call button** to initiate the call.

Making calls from your Contacts

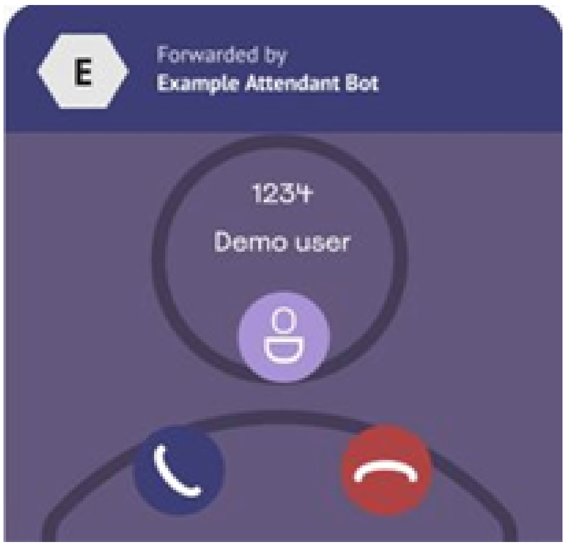
Search for a contact from your **Contacts/Call History pane**.

Click the **call button** next to their name to initiate the call.

MAKING AND TAKING CALLS

The app initiates the call for you.

Click the **answer call button** on the **Call Forward pop-up** when it appears:



The call will launch in a standard Teams call window.

Note: When a call is in progress it will show in your **active calls** list on the **Contacts/Call History pane**.

Click the **hang-up** icon to end the call when done.

TAKING AND REJECTING CALLS

REJECT A CALL

Do this as you would any other Teams call - click the **Reject call** icon on the incoming call popup.

CALLS ON HOLD

Use the standard Teams call hold function to place a call on hold.

ADVANCED CALLING FEATURES

As well as the standard Teams call transfer methods, the app offers the ability to transfer calls outside Teams:

Consult a Teams user then Transfer

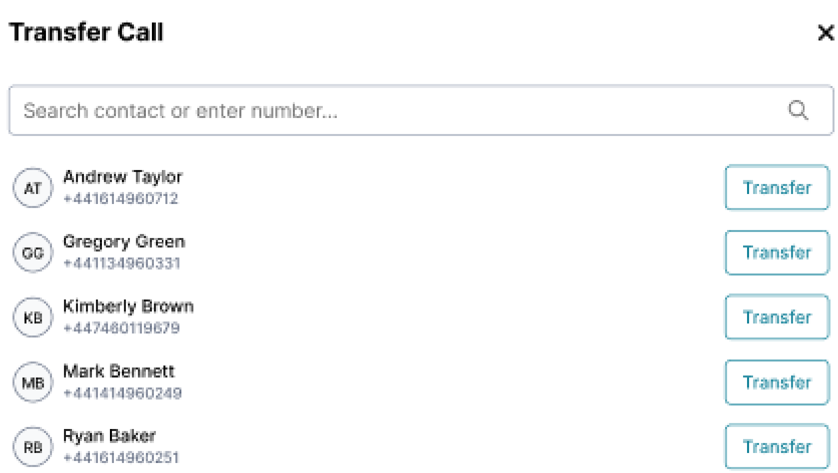
Use this when you want to speak to a Teams user before transferring a call to them.

1. Place or receive a call
2. Initiate another call using the app
3. In the *Teams call window*, Click **Merge calls**
4. Choose the call to merge from the *Teams call window.*

The calls will merge and you can hang up, leaving you free to make other calls.

JUST TRANSFER

Use this when you just want to transfer a call to your contacts in Teams or the company phone system.



1. Place or receive a call
2. From the **active call list** in the app, click the **three dots** icon next to the initial call
3. Click **Transfer call**; the **Transfer call popup** appears:
4. .Search for a contact or enter a number into the **call transfer field** on the **Transfer call popup**
5. .Click **Transfer** next to their entry in the list. This will end the call for you and leave you free to make other calls.

Turning a call into a meeting

Use this when you want to bring in members of your Teams group to the call.

Just add your Teams members to an existing call using the **Teams call interface**. This will turn the call into a meeting.

CALL HISTORY

The **Call History** tab displays a list of your recent interactions, grouped by day, with the most recent at the top.

Calls in the history tab can be filtered by clicking on one of the types:

- **All**
- **Missed** - shows calls that you didn't answer
- **Incoming** - shows calls received
- **Outgoing** - shows outbound calls

Click the **call button icon** to the right of any entry to call that person.

Click the **three dots icon** then click **Remove from history** to remove an entry from your call history log.

CONTACTS MANAGEMENT

The **Contacts/Call History pane** automatically groups your contacts:

- **My Contacts** - shows contacts from your Outlook address book and those you have added manually.
- **My Organization** - shows contacts from your organization’s directory.

Pinning Contacts

Search for a contact from your **Contacts/Call History pane**.

Click the **three dots icon** next to the contact.

Click **Pin**.

The contact will be pinned to your **Contacts/Call History pane**.

Unpinning Contacts

Select a pinned contact from your **Contacts/Call History pane**.

Click the t**hree dots icon** next to the contact.

Click **Unpin**.

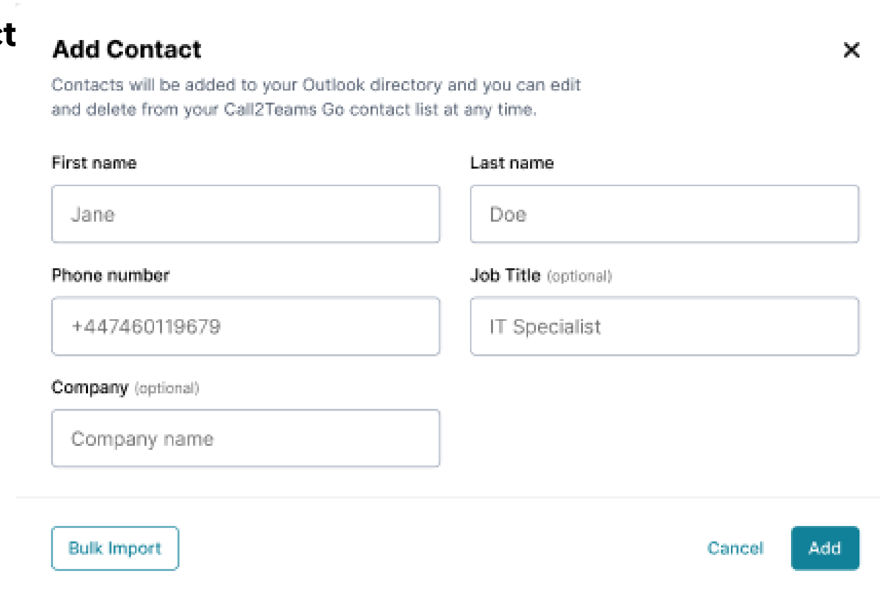
The contact will be removed from your **Contacts/Call History pane**.

CONTACTS MANAGEMENT

Contact Creation

Click the **+ Add Contact button** at the bottom of the Contacts/Call History pane. The contact creation modal appears.

Adding an individual contact



Enter the details in the contact creation form - the new contact will be added to your Outlook contact directory as well as the app contact list:

Enter the following:

- **First name**
- **Last name**
- **Phone number**
- **Job Title** - this field is optional
- **Company name** - this field is optional

Click **Add** to store the new contact, or **Cancel** to abandon the action and return to the main screen.

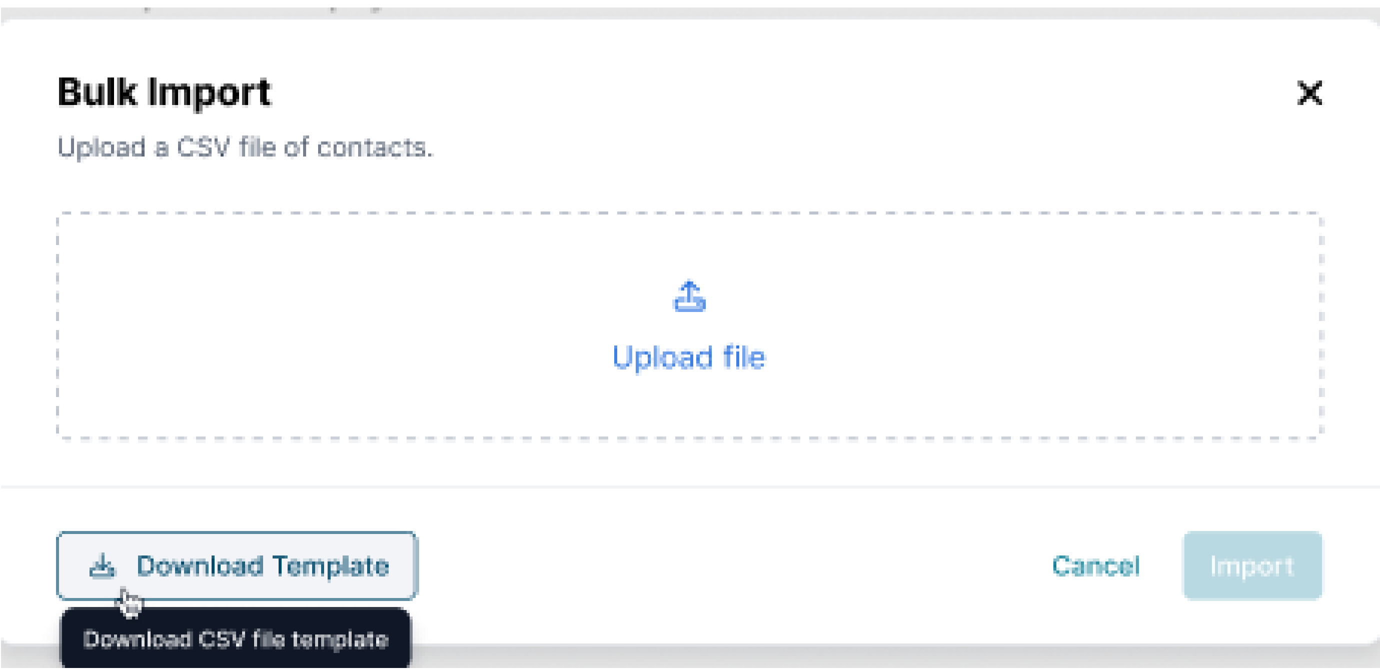
Any contacts added here will appear under **My Contacts** in the contacts list.

DESKTOP VERSION ONLY

Importing contacts in bulk

Click the + Add Contact button at the bottom of the **Contacts/Call History pane**.

The contact creation modal appears. Click the **Bulk Import** button.



You can download a comma-separated values file to use as a template from the **Download Template** button.

Note: Do not overwrite the column titles in the *.csv template*, the import function needs these!

CONTACTS MANAGEMENT

Use this to format your contact list data, then click **Upload** file to find and add your contacts file.

You can add multiple files for upload.

When ready, click **Import** to run the contact import, or click **Cancel** to abandon the action.

The app will notify you when the import is successful, or prompt you to click **Try again** if the upload fails for any reason.

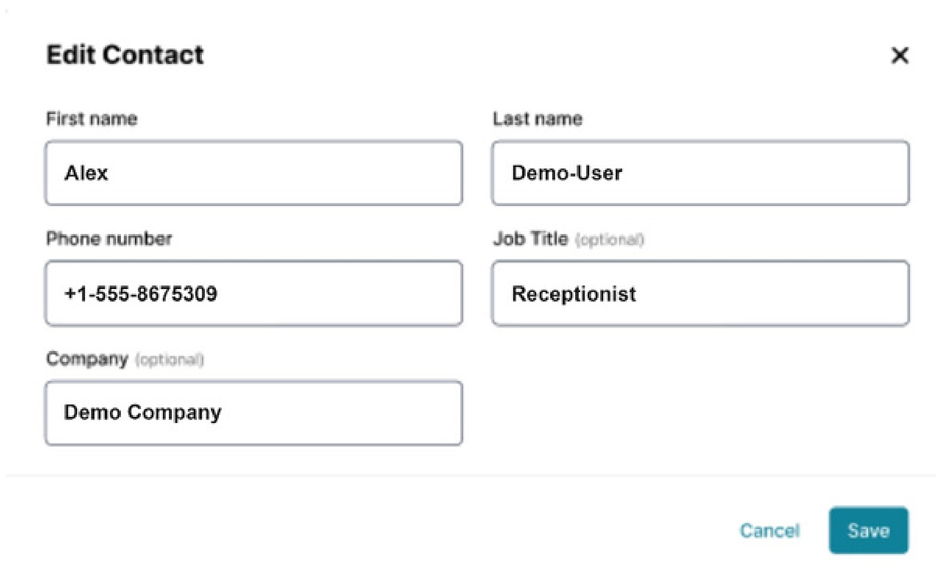
Editing Contacts

Search for a contact from your contact list from the Contacts/Call History pane.

Click the **three dots icon** next to their name.

Click **edit contact**.

The **edit contact modal** appears:



From this you can edit the details of the contact. These changes will be made to your address book.

When ready, click **Save** to store the changes, or **Cancel** to abandon them and return to the home screen.

CONTACTS MANAGEMENT

Deleting a contact

Search for a contact from your contact list on the **Contacts/Call History pane.**

Click the **three dots** icon next to their name.

Click **Delete Contact**.

A warning box will appear. You must click the **Delete Contact confirmation** button to proceed.

Warning: This will **permanently** delete the contact from your address book.

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