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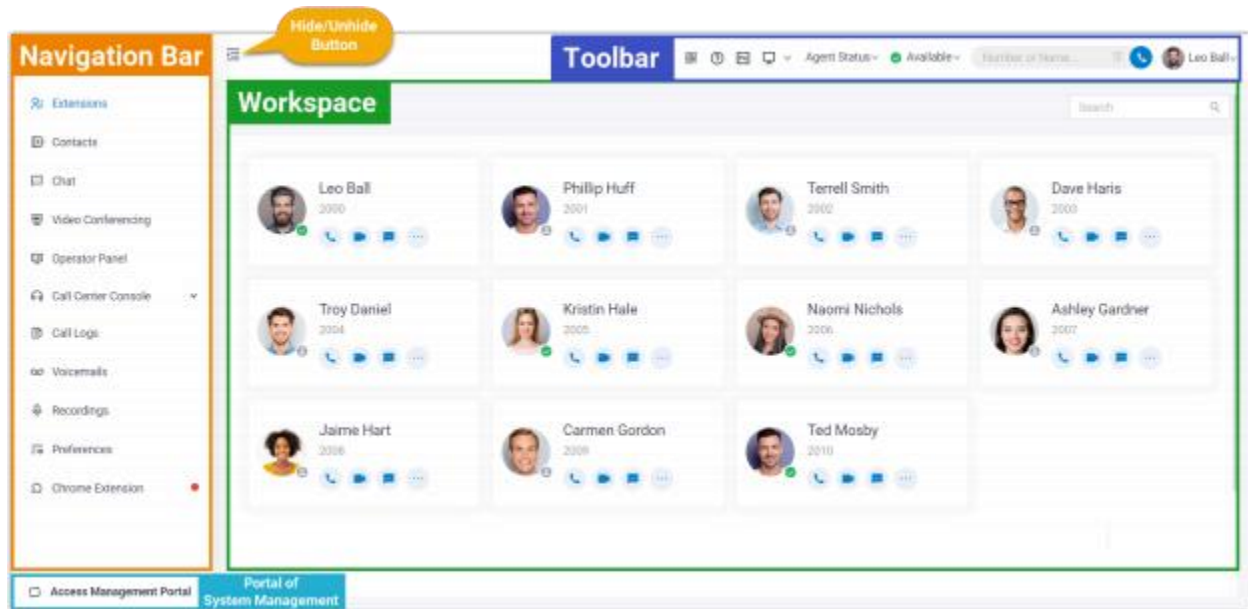
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# Simu Connect Web Client Overview

Simu Connect Web Client is a web-based client that can be launched from mainstream web browser (Google Chrome, Microsoft Edge, and Opera). It combines all the features that you need to communicate, collaborate, and connect with colleagues. This topic provides Simu Connect Web Client layout and describes how it benefits your work.

## Simu Connect Web Client layout



## Benefits

- Live talk with colleagues or external contacts via audio call or video call.
- Collaborate with colleagues efficiently through personal chat, group chat, and integrated file sharing.
- Centralized management for company-shared contacts and personal contacts.
- Face-to-face meetings from web browser within a single click, and enjoy instant, secure, and engaging team communications.
- Visualized console to quickly handle incoming calls based on real-time availability of users.
- Streamlined operations to improve agent efficiency and responsiveness, and offer ultimate customer satisfaction.

# Getting Started

## Log in to Simu Connect Web Client

This topic describes how to log in to Simu Connect Web Client via a link in Simu Connect welcome email.

### Prerequisites

Make sure you have received a welcome email.



#### Note:

The login link is valid for 24 hours and can only be used once. If the link expires, contact system administrator to resend an email.

### Procedure

1. Access your mailbox and find the welcome email.
2. Click the login link for Simu Connect Web Client.

You are directed to Simu Connect Web Client without entering any credentials.

3. Allow notifications from Simu Connect Web Client, so that you can receive notifications when there are incoming calls.
  - a. In the pop-up dialog box, click **Allow**.
4. Read and agree the Privacy Policy Agreement.
  - a. Select the checkbox of **I have read and agree to the above agreement**.
  - b. Click **Confirm**.
5. In the pop-up window, change user password as needed.
  - a. In the **New Password** field, enter a new password.
  - b. In the **Confirm New Password** field, enter the new password again.

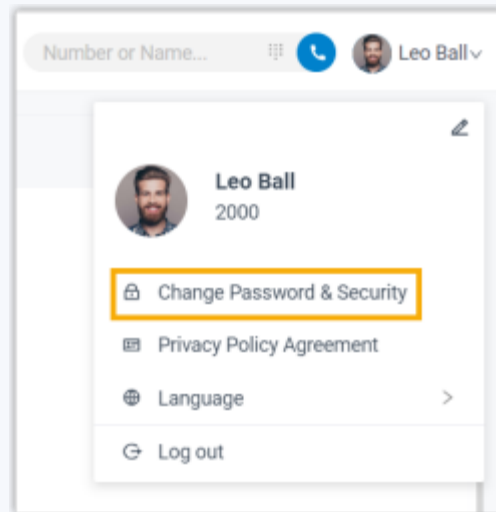


c. Click **Save**.



**Note:**

Next time you want to change user password, you can click your account at the top right corner, go to **Change Password & Security > Change Password** to change password as needed.

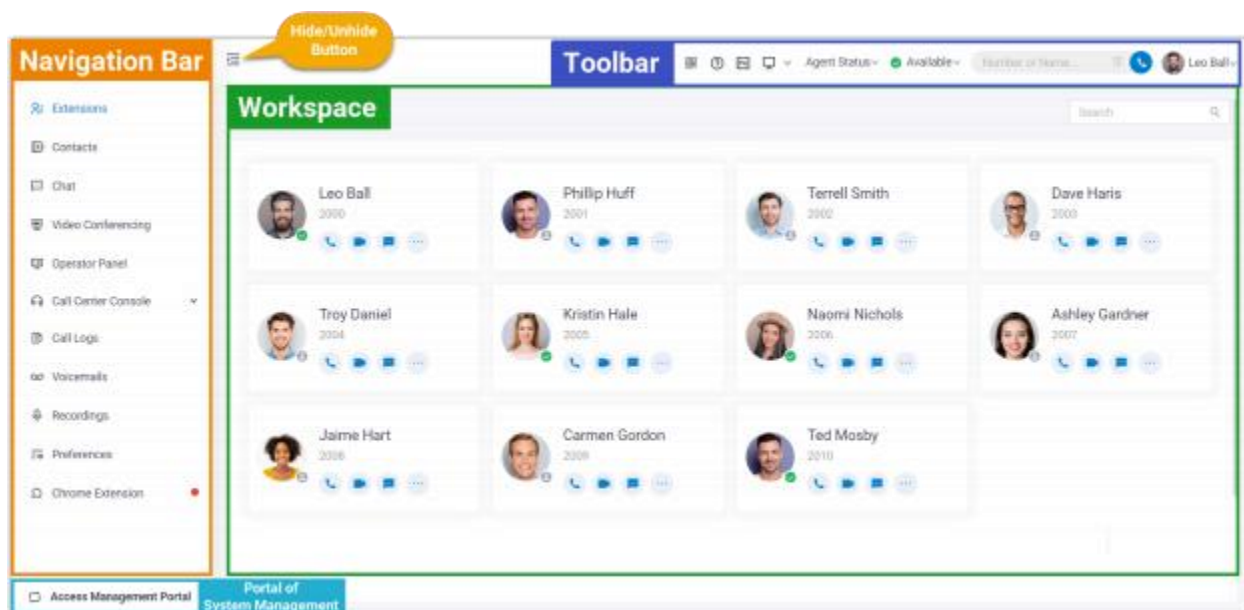


## What to do next

- Use your username (email address) and new password to log in to Simu Connect Web Client again.
- Note down the domain of Simu Connect Web Client, which is displayed in the address bar. Enter the domain on web browser next time you want to access Simu Connect Web Client.

# Simu Connect Web Client Layout

This topic provides an overview of Simu Connect Web Client.



## Navigation bar

Navigation bar provides quick access to the following features:

- **Extensions:** View colleague information, place audio/video calls or leave voicemails for colleagues.
- **Contacts:** Manage external contacts, or place audio calls to external contacts.
- **Chat:** Start a personal chat or a group chat with colleagues.
- **Video Conferencing:** Start an instant meeting or schedule a future meeting to discuss with multiple parties.
- **Operator Panel:** Manage calls of members in a specific group.



### Note:

The feature requires authorization from system administrator.

For more information about operations on Operator Panel, see Operator Panel User Guide.

- **Call Center Console:** Handle queue calls and achieve real-time call monitoring, reporting, and management.

**Note:**

The feature requires support from PBX. Contact system administrator for details.

For more information about operations on Call Center, see Call Center Console User Guide.

- **Call Logs:** View and manage your call logs.
- **Voicemails:** View and manage your voicemails.
- **Recordings:** View and manage your recording files.
- **Preferences:** Configure extension profile, extension presence, voicemail, audio and video, function keys, call-handling rules, email notifications, etc.
- **Chrome Extension:** Provide quick access to 'Cloud One BCS Simu Connect for Google' extension.

**Note:**

The menu only appears when you haven't downloaded or enabled Cloud One Simu Connect for Google' extension.

## Toolbar

Toolbar provides quick access to common actions:

- Download Simu Connect Desktop Client
- Download Simu Connect Mobile Client
- Download 'Cloud One BCS Simu Connect for Google' Extension
- Monitor status of specific objects or quickly perform specific features via function keys
- Switch between CTI mode and Web Client mode
- Change agent status
- Change extension presence
- Place audio calls or video calls
- Change user password
- Change web language

## Workspace

Workspace is an area in which you can view or manage specific features.

## Portal of system management

Access the management portal of PBX server to manage specific system features.



**Note:**

Only when system administrator grants you management permission can you view and access system management portal.

## Reset Your User Password

If you forget the password to log in to Simu Connect clients or the PBX web portal, you can reset your User Password.

### Prerequisites

- If you forget the email address, you cannot reset your password.



**Note:**

In this case, you can contact the system administrator to help you reset your User Password.

## Procedure

1. [Access Simu Connect Web Client](#), click **Forgot Password?**. You are redirected to the **Forgot Password** page.
2. On the **Forgot Password** page, enter the extension number and the email address.
  - **Extension number or username**: Extension number.
  - **Email Address**: The email address that is associated with your extension.
3. Click **Send**.

A password reset email is sent to your email address.
4. Check the password reset email, and click the link provided in the email.

You are directed to the **Reset Password** page.

**Note:**

This link is valid for 30 minutes and can only be used once.

5. On the **Reset Password** page, enter your new password twice, and click **Save**.

## Result

Your User Password is changed. You need to log in to the PBX web portal and Simu Connect clients by the new password next time.

# Set Simu Connect Web Client to Run at Startup on a Computer

To avoid the hassle of opening a web browser and logging in to Simu Connect Web Client every time you want to access it, you can set Simu Connect Web Client to run at startup on a computer. After your computer boots up, your Simu Connect Web Client automatically runs and stays logged in.

## Procedure

- [Step1. Make a web browser run at startup on a computer](#)
- [Step2. Make Simu Connect Web Client run at startup on a web browser](#)

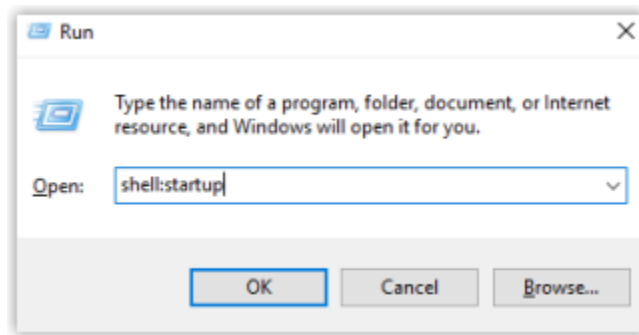
### Step1. Make a web browser run at startup on a computer

Refer to the following instructions based on your operating system to make a web browser run at startup on a computer.

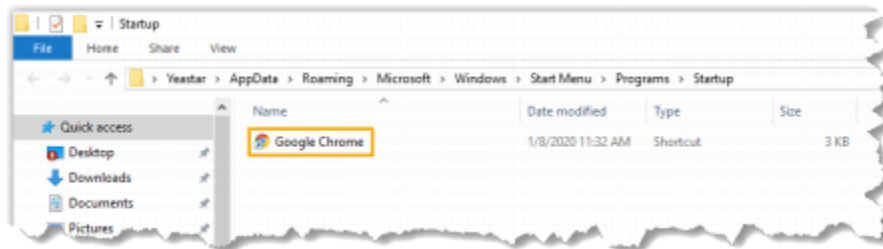
- [Windows](#)
- [macOS](#)

#### Windows

1. On your keyboard, press  + R.
2. In the Run dialog box, enter `shell:startup`, click **OK**.



3. Copy the shortcut of a web browser App.
4. In the Startup folder, paste the shortcut.



The web browser will run at startup on Windows.

## macOS

1. Go to **System Preferences > Users & Groups**, click **Login Items** tab.
2. Click **+** to add a web browser App.
3. In the pop-up window, select a desired web browser App and click **Add**.

Screen shoot

The web browser will run at startup on macOS.

## **Step2. Make Simu Connect Web Client run at startup on a web browser**

1. Log in to Simu Connect Web Client.
2. Right click the Simu Connect Web Client tab.
3. Click **Pin**.

### **Result**

Simu Connect Web Client runs at startup on the computer and stays logged in.



**Important:**

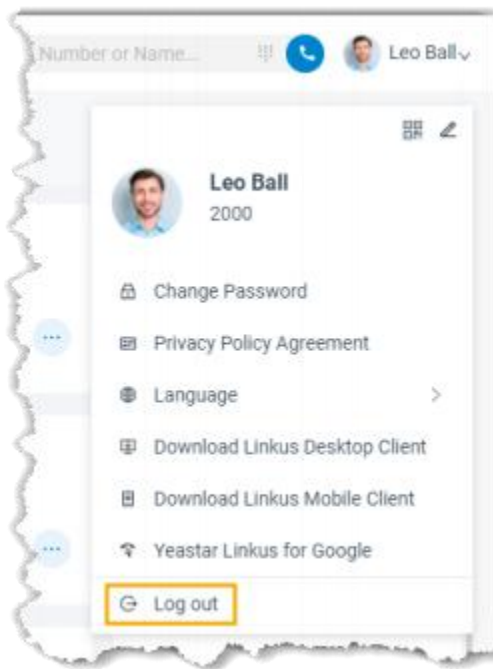
- Do NOT log out of Simu Connect Web Client, or it can not automatically log in next time your web browser opens.
- If you close web browser or Simu Connect Web Client tab, you can NOT receive notifications from Simu Connect Web Client. To avoid this, you can install Chrome extension '[Cloud One Simu Connect for Google](#)', which allows you to make calls or receive notifications even when web browser is closed.

## Log out of Simu Connect Web Client

This topic describes how to log out of Simu Connect Web Client.

### Procedure

1. At the top-right corner of Simu Connect Web Client, click your account.
2. In the drop-down list, click **Log out**.



## **Result**

You log out of Simu Connect Web Client.

# Two-Factor Authentication

## Two-factor Authentication (2FA) Overview

Simu Connect Web Client allows you to configure two-factor authentication (2FA) for your account. With 2FA enabled, both your account password and an additional authentication code are required for Simu Connect login, which adds an extra layer of security to your account. This topic provides an overview of the supported two-factor authentication methods.

### Requirements

System administrator has upgraded the server to 84.10.0.30 or later.

### Two-factor authentication by authenticator application

This method requires you to install an authenticator application on your mobile phone. The supported applications are listed below:

- [Google Authenticator](#)
- [FreeOTP](#)
- [Twilio Authy](#)
- [Microsoft Authenticator](#)

After installing an authenticator application, you need to add your account to the application, via which you can obtain authentication codes for two-factor authentication. When you log in to your account, both account password and the authentication code generated by the authenticator application are required.

For more information about the configuration, see [Configure Two-factor Authentication using Authenticator Application](#).

### Two-factor authentication by Email

This method allows you to receive authentication codes for two-factor authentication via the email address you use to log in. When you log in to your account, both account password and the authentication code sent to your email are required.

For more information about the configuration, see [Configure Two-factor Authentication using Email](#).

# Configure Two-factor Authentication using Authenticator Application

This topic describes how to configure two-factor authentication using an authenticator application on your mobile phone.

**Note:**

The configurations of two-factor authentication is applied to all your Simu Connect clients.

## Prerequisites



You have installed one of the following supported authenticator applications on your mobile phone.

- [Google Authenticator](#)
- [FreeOTP](#)
- [Twilio Authy](#)
- [Microsoft Authenticator](#)

## Procedure

1. At the top-right corner of Simu Connect Web Client, click your account, then go to **Change Password & Security > Security Settings**.
2. Select the checkbox of **Two-Factor Authentication**.
3. In the pop-up **Password** window, enter your account password and click **Confirm** to verify your operation.
4. Select **Authenticated by Authenticator**.
5. Add your account to the authenticator application via either of the following methods.

Method	Instruction
Scan QR Code to quickly add the account	You can quickly add your account to the authenticator application by scanning the QR code provided by Simu Connect Web Client. <ol style="list-style-type: none"><li>a. On your mobile phone, open the authenticator application, and select to scan QR code.</li><li>b. Scan the QR code shown on Simu Connect Web Client.</li></ol>

Method	Instruction
	<div data-bbox="621 254 1312 510"> <p>3.Scan the QR code to get a 6-digit authentication code.</p>  </div> <p>Your account is added to the application automatically, a 6-digit authentication code is shown.</p>
Manually add the account	<p>In case you cannot scan QR code, you can manually add your account and enter the secret key provided by Simu Connect Web Client.</p> <ol style="list-style-type: none"> <li>On Simu Connect Web Client, click <b>Can't scan</b> beside the QR code.</li> </ol> <p>A secret key is displayed under the QR code, note it down for later use.</p> <div data-bbox="621 863 1386 1119"> <p>3.Scan the QR code to get a 6-digit authentication code.</p>  </div> <ol style="list-style-type: none"> <li>On your mobile phone, open the authenticator application, and select to manually add an account.</li> <li>Enter the relevant information and paste the secret key.</li> </ol> <div data-bbox="621 1304 1386 1528"> <p><b>Note:</b></p> <p>If you need to complete more configurations for the secret key, you should set <b>SHA1</b> as the algorithm for <b>TOTP</b> protocol, and set to generate <b>6-digit</b> code with an interval of <b>30</b> seconds.</p> </div> <p>Your account is added to the application, a 6-digit authentication code is shown.</p>

6. On Simu Connect Web Client, enter the 6-digit authentication code in the **Authentication Code** field.

7. Click **Save**.

## Result

- The webpage prompts a message "Edited successfully.", which means that you have successfully set up two-factor authentication.
- Next time you log in to Simu Connect UC clients (Web Client, Desktop Client, and Mobile Client) using the email address and password of your extension account, you need to enter an authentication code additionally.



### Troubleshooting:

#### What if I fail to log in with two-factor authentication?

If you lose access to your two-factor authentication (e.g. you lost your device or could not receive authentication code via email), you can contact system administrator to disable two-factor authentication for your account, so that you can directly log in with your email address and password.

### Related information

[Manage Two-Factor Authentication](#)

## Configure Two-factor Authentication using Email

This topic describes how to configure two-factor authentication using email.



### Note:

The configurations of two-factor authentication is applied to all your Simu Connect clients.

## Procedure

1. At the top-right corner of Simu Connect Web Client, click your account, then go to **Change Password & Security > Security Settings**.
2. Select the checkbox of **Two-Factor Authentication**.
3. In the pop-up **Password** window, enter your account password and click **Confirm** to verify your operation.
4. Select **Authenticated by Email**, and complete the following settings:

## Screen shoot

a. Click **Send**.

An email containing a 6-digit authentication code is sent to the email address that you use to log in.



**Note:**

The code expires 5 minutes after the email is sent.

b. In the **Authentication Code** field, enter the authentication code.

c. Click **Save**.

## Result

- The webpage prompts a message "Edited successfully.", which means that you have successfully set up two-factor authentication.
- Next time you log in to Simu Connect UC clients (Web Client, Desktop Client, and Mobile Client) using the email address and password of your extension account, you need to enter an authentication code additionally.



**Note:**

In later use, if the email address associated with your extension is changed, the two-factor authentication will automatically be disabled.

### Troubleshooting:



#### What if I fail to log in with two-factor authentication?

If you lose access to your two-factor authentication (e.g. you lost your device or could not receive authentication code via email), you can contact system administrator to disable two-factor authentication for your account, so that you can directly log in with your email address and password.

### Related information

[Manage Two-Factor Authentication](#)

## Manage Two-Factor Authentication

This topic describes how to manage the two-factor authentication feature, including removing trusted devices, changing authentication method, and disabling the two-factor authentication feature.

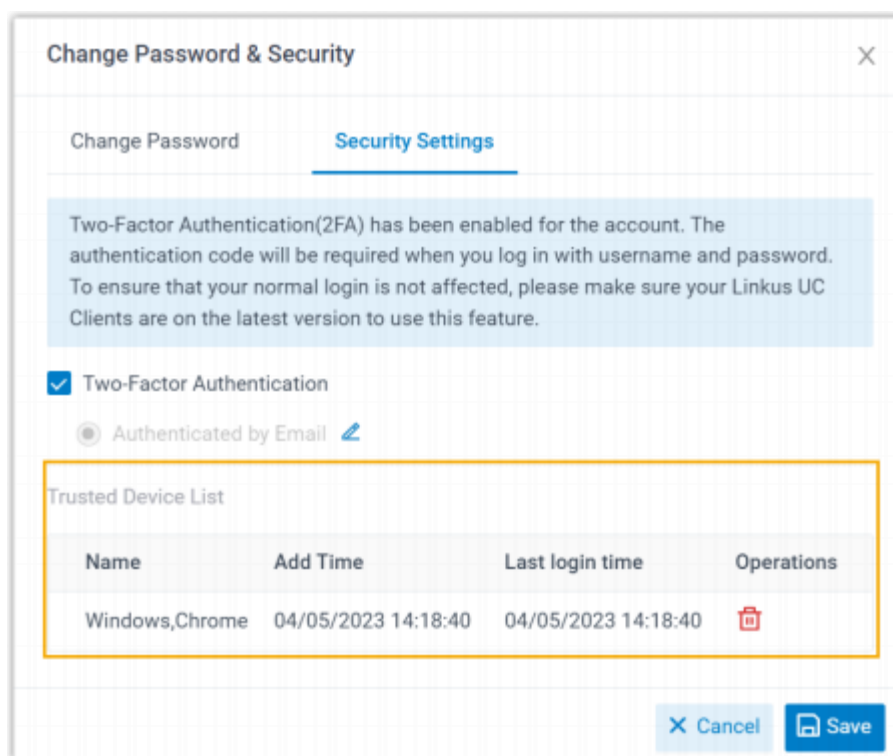
### Remove a trusted device

In case you lost access to a trusted device, you can remove it from the list if necessary.

1. At the top-right corner of Simu Connect Web Clients, click your account, then go to **Change Password & Security > Security Settings**.

The trusted devices are displayed in the **Trusted Device List** section.





2. Click beside the device that you want to remove.
3. In the pop-up window, click **OK**.

## Change two-factor authentication method

1. At the top-right corner of Simu Connect Web Client, click your account, then go to **Change Password & Security > Security Settings**.
2. Click beside the current authentication method.
3. Select the desired method, then complete the follow-up settings accordingly.

## Disable two-factor authentication

1. At the top-right corner of Simu Connect Web Client, click your account, then go to **Change Password & Security > Security Settings**.
2. Unselect the checkbox of **Two-Factor Authentication**.
3. In the pop-up **Password** window, enter your account password and click **Confirm** to verify your operation.
4. In the **Security Settings** tab, click **Save**.

The page prompts a message "Edited successfully.", which means that you have successfully disabled two-factor authentication.

**Related information**

[Configure Two-factor Authentication using Authenticator Application](#)

[Configure Two-factor Authentication using Email](#)

# Extensions

## Configure Extension Display

By default, all the extensions within groups visible to you are displayed on Simu Connect Web Client, whether the extensions are registered or not. You can configure whether to display the unregistered extensions. This topic describes how to configure extension display.

### Procedure

1. Log in to Simu Connect Web Client, go to **Preferences > User > Status View**.
2. To display all the extensions, keep the option **Show Unregistered Extensions** selected.
3. To display only the registered extensions, unselect the checkbox of **Show Unregistered Extensions**.
4. Click **Save**.

### Related information

[View Colleague Extensions](#)

## View Colleague Extensions

This topic describes how to view colleague extensions and quickly reach colleagues.

### Procedure


1. Log in to Simu Connect Web Client.
2. On the left navigation bar, click **Extensions**.
3. **Optional:** Select the group or department to which the desired extension belongs.

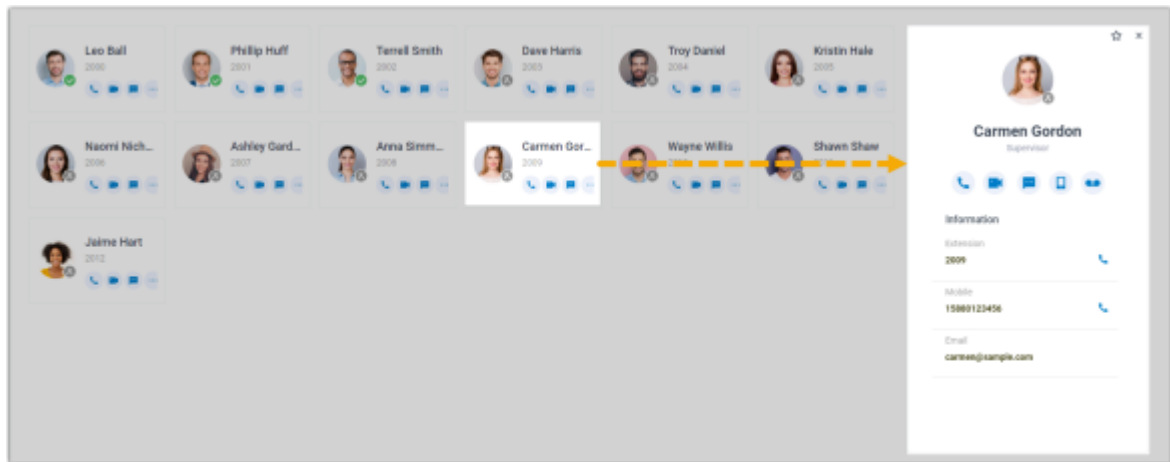


#### Note:

By default, all the extensions within the selected group or department are displayed on Simu Connect Web Client, whether the extensions are registered or not.

You can choose to display only the registered extensions. For more information, see [Configure Extension Display](#).

- To select a group, select one from the drop-down list of  .  
Extensions within the group are displayed.
  - To select a department, select one from the organizational tree.  
Extensions within the department are displayed.
4. To view details about a specific colleague, click the contact card.



5. **Optional:** Click specific icons to manage or reach colleagues.

- ☆: Add to the **Favorites** list.
- 📞: Place an audio call to extension.
- e: Place a video call to extension.
- 💬: Start a personal chat.
- O : Call mobile number.
- as: Leave voicemail.

## View and Manage Colleague Extension's Calls



An authorized user can instantly see which colleague extension's ringing or on a call, view names and IDs of the other party, and manage calls with just a few clicks from Extensions panel. This topic describes how to view and manage colleague extension's calls.

### Requirements

- **PBX Server:** 84.16.0.25 or later
- **Extension:** Your extension has been assigned the **Allow Call Operations in the Extension Page** permission.

### Procedure

1. Log in to Simu Connect Web Client.
2. On the left navigation bar, click **Extensions**.

The colleague extension that initiates a call or is on a call is marked with , and the colleague extension that receives an incoming call is marked with .

3. Manage colleague extension's calls as needed.

- For colleague extension that initiates a call, you can click the call status label, then choose to hang up the call.
- For colleague extension that is on a call, you can click the call status label, then choose to transfer, park, monitor, or hang up the call.

- For colleague extension that receives a call, you can click the call status label, then choose to redirect, pick up, or hang up the call.


# Contacts

## View and Manage Company Contacts

This topic describes how to view, add, edit, or delete company contacts in specific phonebooks on Simu Connect Web Client.

### View a company contact

Before you get started, make sure system administrator has granted **View Phonebooks** permission to your extension.

1. Log in to Simu Connect Web Client, click **Contacts**.
2. At the top-left corner of workspace, select a phonebook from the drop-down list of .
3. To view details about a specific contact, click the contact card.



## Add a company contact

There are several ways for you to add a company contact:

- [Add a company contact in a phonebook](#)
- [Add a company contact from personal contacts list](#)
- [Add a company contact from Call Logs](#)
- [Add a company contact from Voicemails list](#)
- [Add a company contact from Recordings list](#)




### Note:

Before you get started, make sure system administrator has granted **Manage Phonebooks (Add, Edit, Delete)** permission to your extension.

### Add a company contact in a phonebook

Select a phonebook that you are authorized to manage, and then add a company contact.

1. Log in to Simu Connect Web Client, click **Contacts**.
2. At the top-left corner of workspace, select a phonebook from the drop-down list of .

3. Click **Add**, enter contact information, and then click **Save**.




**Note:**

If your organization has a phonebook that contains all the company contacts, the contact will be automatically added to the phonebook.

The contact is added to the relevant phonebooks.

**Add a company contact from personal contacts list**

If you want to share a personal contact within your organization, you can add the contact to a company phonebook. Anyone who is allowed to view or manage the phonebook can see and reach the contact.

1. Log in to Simu Connect Web Client, click **Contacts**.
2. At the top-left corner of workspace, select **Personal Contacts** from the drop-down list of .

3. Find the desired contact, click [...](#) and select **Add to Phonebooks**.
4. In the pop-up window, select the checkbox of a phonebook and click **Confirm**.




**Note:**

Only the phonebooks that you are authorized to manage will be displayed on the page.

The screenshot shows a modal window titled "Add to Phonebooks". It contains a search input field at the top right. Below the search field is a table with two columns, both labeled "Phonebook Name". The first row of the table has a checked checkbox in the first column, the text "Customer\_Asia-Pacific" in the second column, and the number "3" in the third column. Below the table is a pagination bar that says "Total :1", followed by a page number "1" inside a box, and "20 / page". At the bottom right of the modal are two buttons: "Cancel" and "Confirm".

The page prompts "Added successfully", which indicates that the contact is added and phonebook is updated.

#### Add a company contact from Call Logs

1. Log in to Simu Connect Web Client, click **Call Logs**.
2. Right click a record to add a company contact.
3. To add a new contact, do as follows:
  - a. Click **Add New Contact**.
  - b. In the **Add to** drop-down list, select **Company Contacts**; In the **Phonebook List** drop-down list, select a phonebook.
  - c. Enter contact information.
  - d. Click **Save**.
4. To add to an existing contact, do as follows:
  - a. Click **Add to Existing Contact**.
  - b. Select a phonebook from the drop-down list of .




#### Note:

Only the phonebooks that you are authorized to manage will be displayed.

	Email	Business
<input type="checkbox"/> Cecelia Reid	cecelia@sample.com	15556632258
<input type="checkbox"/> Jaime Hart	jaime@sample.com	18854690863
<input type="checkbox"/> Maria Yates	marta@sample.com	18856302145

- c. Select the checkbox of an existing contact.
- d. Click **Confirm** and **Save**.

### Add a company contact from Voicemails list

1. Log in to Simu Connect Web Client, click **Voicemails**.
2. Right click a record to add a company contact.
3. To add a new contact, do as follows:
  - a. Click **Add New Contact**.
  - b. In the **Add to** drop-down list, select **Company Contacts**; In the **Phonebook List** drop-down list, select a phonebook.
  - c. Enter contact information.
  - d. Click **Save**.
4. To add to an existing contact, do as follows:
  - a. Click **Add to Existing Contact**.
  - b. Select a phonebook from the drop-down list of .



#### Note:

Only the phonebooks that you are authorized to manage will be displayed.

**Add to Company Contacts/Phonebooks**

Customer\_Asia-Pacific ▼

All  
Personal Contacts  
Customer\_Asia-Pacific


Search

	Email	Business
<input type="checkbox"/>	cecilia@sample.com	15556632258
<input type="checkbox"/>	cecilia@sample.com	18854690863
<input type="checkbox"/>	jaime@sample.com	18856302145
<input type="checkbox"/>	marta@sample.com	18851254209

Total: 4 < 1 > 10 / page

- c. Select the checkbox of an existing contact.
- d. Click **Confirm** and **Save**.

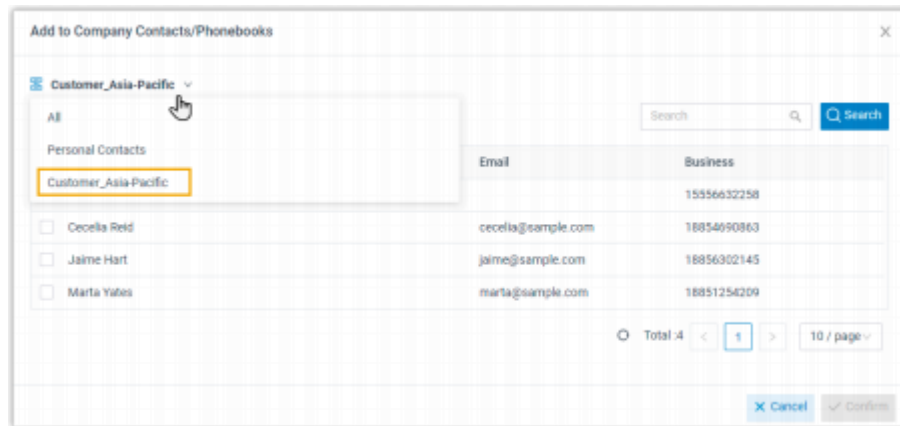
### Add a company contact from Recordings list

1. Log in to Simu Connect Web Client, click **Recordings**.
2. Right click a record to add a company contact.
3. To add a new contact, do as follows:
  - a. Click **Add New Contact**.
  - b. In the **Add to** drop-down list, select **Company Contacts**; In the **Phonebook List** drop-down list, select a phonebook.
  - c. Enter contact information.
  - d. Click **Save**.
4. To add to an existing contact, do as follows:
  - a. Click **Add to Existing Contact**.
  - b. Select a phonebook from the drop-down list of .



#### Note:



Only the phonebooks that you are authorized to manage will be displayed.



- c. Select the checkbox of an existing contact.
- d. Click **Confirm** and **Save**.



## Edit a company contact

Before you get started, make sure system administrator has granted **Manage Phonebooks (Add, Edit, Delete)** permission to your extension.

1. Log in to Simu Connect Web Client, click **Contacts**.
2. At the top-left corner of workspace, select a phonebook from the drop-down list .
3. Find the desired contact, click  to edit the desired contact.
4. After you edit contact information, click **Save**. The contact's information is updated.

## Delete company contacts


Before you get started, make sure system administrator has granted **Manage Phonebooks (Add, Edit, Delete)** permission to your extension.

1. Log in to Simu Connect Web Client, click **Contacts**.
2. At the top-left corner of workspace, select a phonebook from the drop-down list of .
3. Find the desired contact, click , click **Delete** and **OK**. The contact is removed from the PBX system.

## View and Manage Personal Contacts

This topic describes how to view, add, edit, delete, import, and export personal contacts on Simu Connect Web Client.

### View a personal contact

1. Log in to Simu Connect Web Client, click **Contacts**.
2. At the top-left corner of workspace, select **Personal Contacts** from the drop-down list .



3. To view details about a specific contact, click the contact card.


## **Add a personal contact**

There are several ways for you to add a personal contact:

- [Add a personal contact directly](#)
- [Add a personal contact from a phonebook](#)
- [Add a personal contact from Call Logs](#)
- [Add a personal contact from Voicemails list](#)
- [Add a personal contact from Recordings list](#)

### **Add a personal contact directly**



1. Log in to Simu Connect Web Client, click **Contacts**.

2. At the top-left corner of workspace, select **Personal Contacts** from the drop-down list of .
3. Click **Add**, enter contact information, and then click **Save**.

The contact is added and your Personal Contacts is updated.


#### **Add a personal contact from a company phonebook**

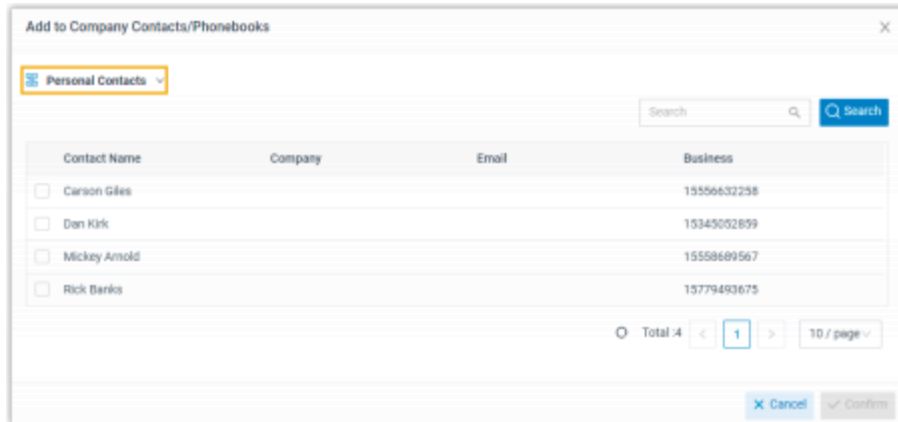
If you are allowed to manage specific phonebooks, you can add company contacts in the phonebooks to your personal contacts list.

1. Log in to Simu Connect Web Client, click **Contacts**.
2. At the top-left corner of workspace, select the phonebook where the contact belongs from the drop-down list of .
3. Find the desired contact, click , select **Add to Personal Contacts**.

The page prompts "Added successfully", which indicates that the contact is added and your Personal Contacts is updated.

### Add a personal contact from Call Logs

1. Log in to Simu Connect Web Client, click **Call Logs**.
2. Right click a record to add a personal contact.
3. To add a new contact, do as follows:
  - a. Click **Add New Contact**.
  - b. In the **Add to** drop-down list, select **Personal Contacts**.
  - c. Enter contact information.
  - d. Click **Save**.
4. To add to an existing contact, do as follows:
  - a. Click **Add to Existing Contact**.
  - b. Select **Personal Contacts** from the drop-down list of .



Contact Name	Company	Email	Business
<input type="checkbox"/> Carson Giles			15556632258
<input type="checkbox"/> Dan Kirk			15345052899
<input type="checkbox"/> Mickey Arnold			15558689567
<input type="checkbox"/> Rick Banks			15779493675


Total: 4    1 / 10 page

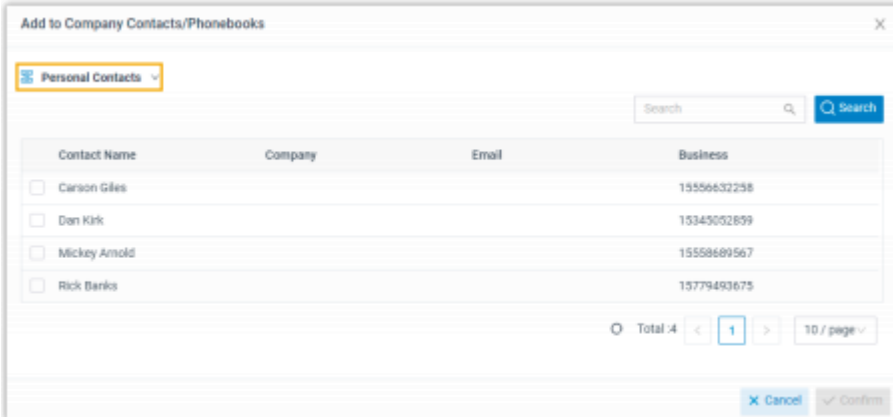
Cancel Confirm

- c. Select the checkbox of an existing contact.
- d. Click **Confirm** and **Save**.

### Add a personal contact from Voicemails list

1. Log in to Simu Connect Web Client, click **Voicemails**.
2. Right click a record to add a personal contact.
3. To add a new contact, do as follows:
  - a. Click **Add New Contact**.
  - b. In the **Add to** drop-down list, select **Personal Contacts**.
  - c. Enter contact information.
  - d. Click **Save**.


4. To add to an existing contact, do as follows:
  - a. Click **Add to Existing Contact**.
  - b. Select **Personal Contacts** from the drop-down list of .

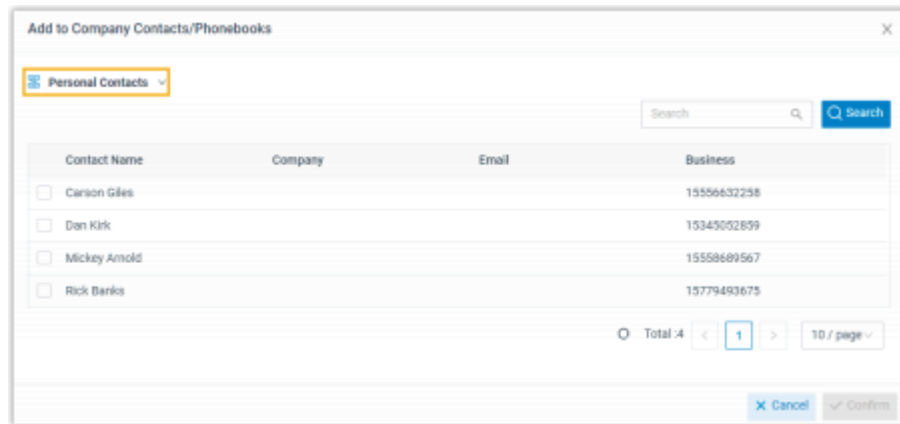


Contact Name	Company	Email	Business
<input type="checkbox"/> Carson Giles			15556632258
<input type="checkbox"/> Dan Kirk			15345002899
<input type="checkbox"/> Mickey Arnold			15558689567
<input type="checkbox"/> Rick Banks			15779493675

- c. Select the checkbox of an existing contact.
- d. Click **Confirm** and **Save**.



#### **Add a personal contact from Recordings list**

1. Log in to Simu Connect Web Client, click **Recordings**.
2. Right click a record to add a personal contact.
3. To add a new contact, do as follows:
  - a. Click **Add New Contact**.
  - b. In the **Add to** drop-down list, select **Personal Contacts**.
  - c. Enter contact information.
  - d. Click **Save**.
4. To add to an existing contact, do as follows:
  - a. Click **Add to Existing Contact**.
  - b. Select **Personal Contacts** from the drop-down list of .



- c. Select the checkbox of an existing contact.
- d. Click **Confirm** and **Save**.



## Edit a personal contact

1. Log in to Simu Connect Web Client, click **Contacts**.
2. At the top-left corner of workspace, select **Personal Contacts** from the drop-down list of .
3. Find the desired contact, click  to edit the desired contact information, and then click **Save**.

The contact's information is updated in your Personal Contacts.


## Delete a personal contact

1. Log in to Simu Connect Web Client, click **Contacts**.

2. At the top-left corner of workspace, select **Personal Contacts** from the drop-down list of .
3. Find the desired contact, click , click **Delete** and **OK**. The contact is removed from your Personal Contacts.

## Export personal contacts

You can export all personal contacts to a CSV file, and then make additions, removals, and changes to the file.

1. Log in to Simu Connect Web Client, click **Contacts**.
2. At the top-left corner of workspace, select **Personal Contacts** from the drop-down list of .
3. Click **Export**.

A CSV file is saved to your computer.

## Import personal contacts


We recommend that you export personal contacts data to a CSV file first, and use the file as a template to start with. In this way, you can save time and effort.

### Prerequisites

Requirements of an imported file:

- **Format:** UTF-8 .CSV
- **Size:** Less than 300 MB
- **File name:** Less than 127 characters
- **Import parameters:** Ensure that the import parameters meet requirements. For more information, see [Administrator Guide - Contacts Parameters](#).

### Procedure

1. Log in to Simu Connect Web Client, click **Contacts**.
2. At the top-left corner of workspace, select **Personal Contacts** from the drop-down list of .

Screen shoot

3. Click **Import**.
4. In the pop-up window, click **Browse**, and select your CSV file.
5. Click **Import**.

The personal contacts in the CSV file will be displayed in the **Personal Contacts** list.

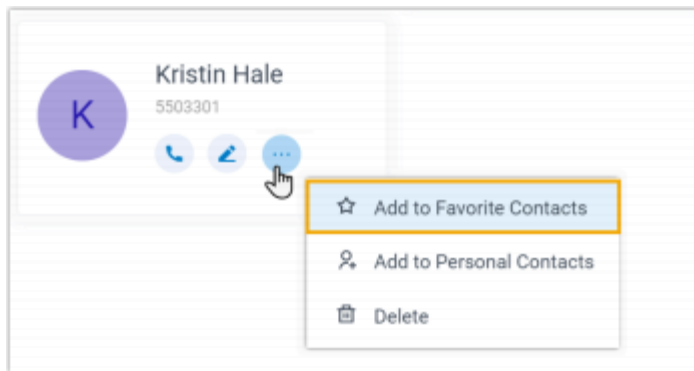
## Mark or Remove Favorite Contacts

This topic describes how to mark or remove favorite contacts on Simu Connect Web Client.

### Mark a favorite contact


You can mark the desired contacts as favorites for quick location and retrieval.

1. Log in to Simu Connect Web Client, click **Contacts**.
2. Find the desired contact, click. **...** and select **Add to Favorite Contacts**.



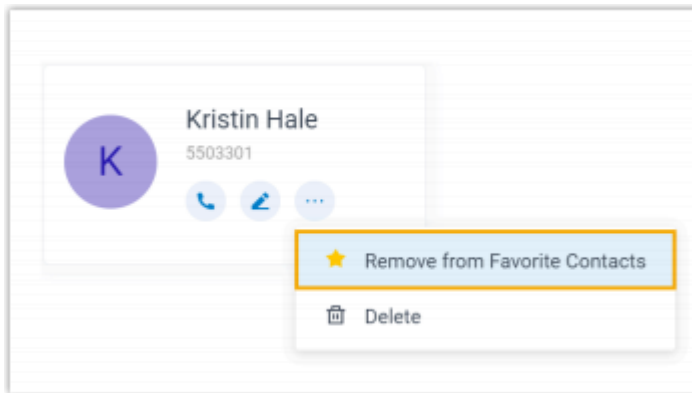
This contact is marked as favorites, which can be found in the **Favorite Contacts** list.

### Remove a favorite contact

1. Log in to Simu Connect Web Client, click **Contacts**.
2. At the top-left corner of workspace, select **Favorite Contacts** from the drop-down list of .



3. Find the desired contact, click. . . and select **Remove from Favorite Contacts**.



This contact is removed from your **Favorite Contacts** list.

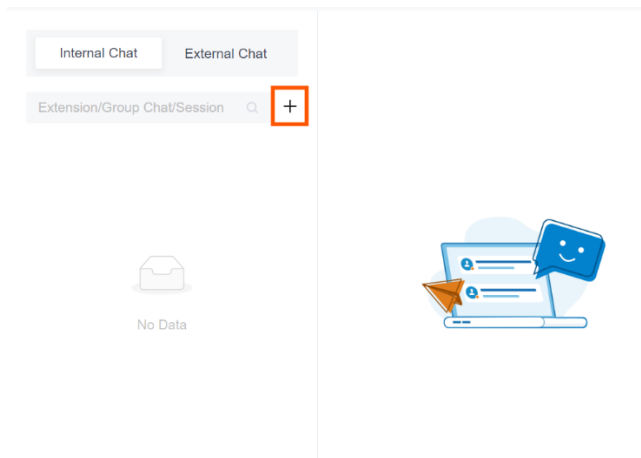
# Chat

## Internal Chat

### Simu Connect Web Client Internal Chat Overview

Simu Connect Internal Chat (Instant Messaging, IM) feature allows you to start a conversation (either 1:1 or group chat) with colleague, and liven up the conversation with emoji, pictures, and file sharing.

#### Preview of Simu Connect Web Client internal chat



#### Restrictions

- **Members per group chat:** Max. 200 people
- **Group chat created (per user):** Max. 100 group chats
- **File Sharing:** Max. 100 MB
- **Chat history:** Max. 1 year

## Highlights

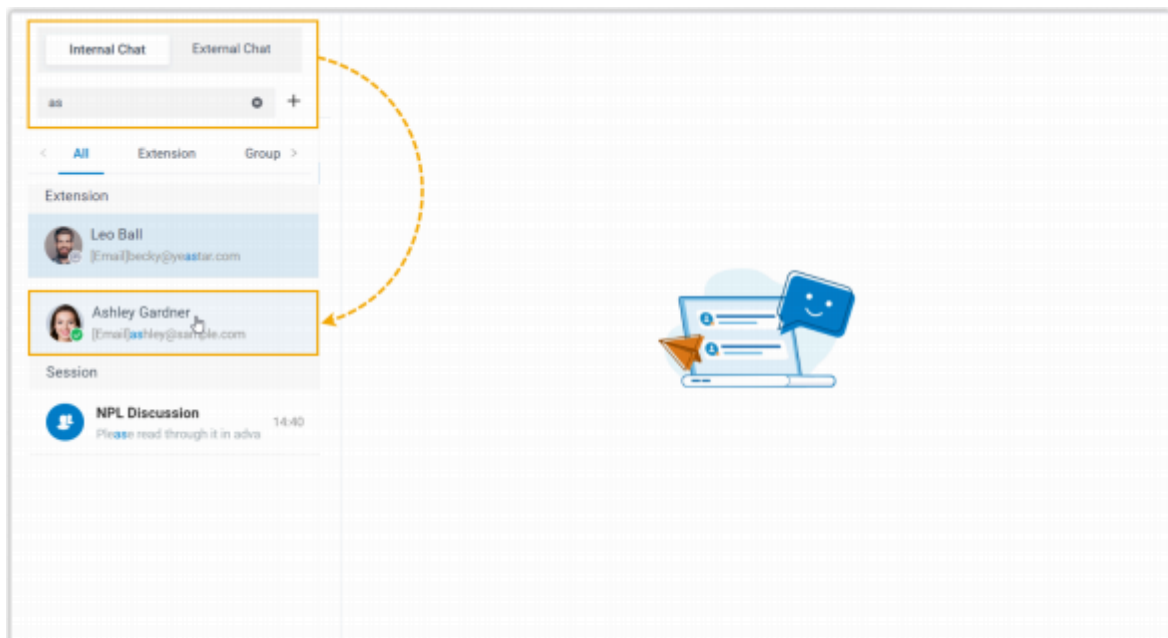
- **Private 1:1 or Group Chat:** Collaborate with your colleagues efficiently through a per-sonal chat or a group chat.
- **Customizable Notification Settings:** Enable or disable notifications (pop-up and sound) for new messages.
- **Chat History:** Chat histories are auto-synced across Simu Connect UC Clients, which means that you can access the same messages and files from Simu Connect Web Client and Simu Connect Mobile Client.
- **Flexible Message Type:** Send text messages and emojis; Share files and photos; Make an audio or video call within a click.

## Start a Chat Session with Your Colleagues

For cases that do not require immediate attention, you can send instant messages right from Simu Connect Web Client to your colleagues without disturbing their work. This topic describes how to start a one-on-one chat and a group chat.

### Procedure

1. Log in to Simu Connect Web Client.
2. On the left navigation bar, click **Chat**, then click the **Internal Chat** tab.
3. To start a chat with a colleague, do as follows:



- a. In the search bar, enter a desired value to find the desired colleague.



**Note:**

You can enter a name, a number, an email address, or a chat history.

- b. Click the matched colleague.
4. To start a group chat with multiple colleagues, do as follows:

- a. Click **+** right beside the search bar.

Internal Chat
External Chat

+



No Data



- b. In the pop-up window, select desired colleagues, then click **Create**.



**Note:**

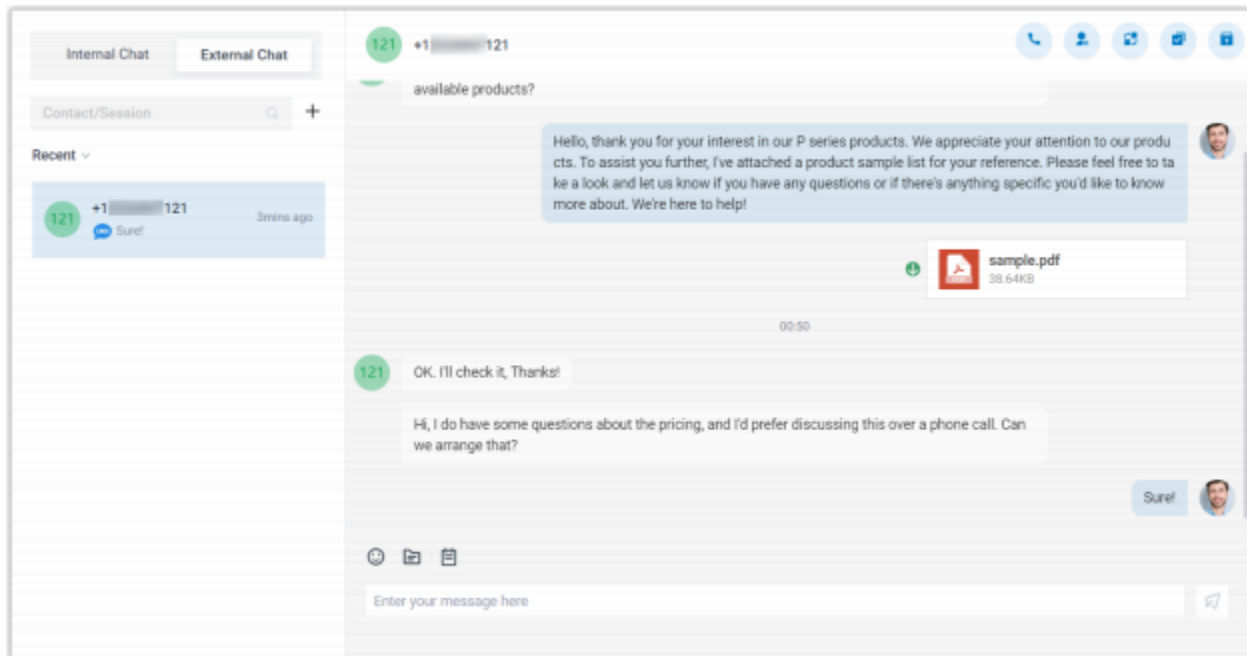
Up to 200 members can be in a group chat.

## External Chat

### Simu Connect Web Client External Chat Overview

Simu Connect External Chat feature allows you to centrally deal with customer queries (from different messaging channels, such as SMS or social media) on Simu Connect Web Client.

## Preview of Simu Connect Web Client external chat







## Requirements

Contact system administrator to check if PBX server meets the following requirements:

- **Version:** 84.12.0.32 or later.
- **Plan:** **Enterprise Plan** or **Ultimate Plan**
- **Messaging:** At least one messaging channel is set up on PBX.

## Channel types

The external chats are marked with specific icons to indicate the type of the source channel, as listed below:

- : The message is sent from SMS channel.
- : The message is sent from WhatsApp channel.
- : The message is sent from Facebook channel.
- : The message is sent from Live Chat channel.

## Restrictions

Learn about the restrictions of different messaging channels.

	SMS channel	WhatsApp channel	Facebook channel	Live Chat channel
Chat type	Only support 1:1 conversation			
Session auto closure	Depends on system administrator's configurations.	Automatically close a messaging session when the session has been inactive for 24 hours.	Depends on system administrator's configurations.	
Messaging mechanism	You can receive and reply to customers' inbound messages, and initiate a messaging session.	You can only receive and reply to customers' inbound messages, but can NOT initiate a messaging session.		
File sharing	Max. 100 MB		Max. 25 MB	Max. 10 MB
File retention period	72 hours			

## Highlights

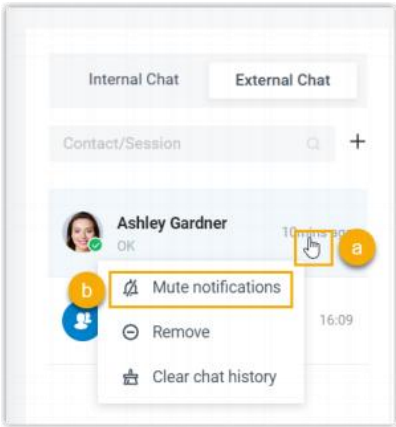

- **All-in-one message inbox:** Receive and manage all customers' queries across multiple messaging channels centrally in one place.
- **Customer contact using business number:** Contact customers using a business phone number, while keeping your personal number private.
- **Seamless collaboration across colleagues:** Transfer a messaging session to another colleague, the colleague can review the whole chat history and take over the messaging session without hassle.
- **Flexible session management:** Supports management operations including elevating a messaging session to a call, archiving or unarchiving messaging sessions, and more.
- **Customizable Notification Settings:** Enable or disable notifications (pop-up and sound) for new messages.

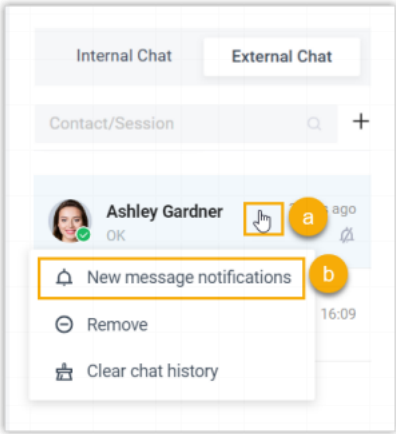
# Change Chat Notification Settings

This topic describes how to mute or unmute notifications for a specific chat, and how to configure new message notifications (pop-up and sound) for all Simu Connect chats.

## Mute or unmute notifications for a chat

1. On Simu Connect Web Client, click **chat**, then click the **Internal Chat** or **External Chat** tab.
2. Mute or unmute notifications for the desired chat as needed.

Operation	Instruction
<p>Figure 1. <b>Mute notifications for a chat</b></p>  A screenshot of the Simu Connect Web Client chat interface. At the top, there are two tabs: 'Internal Chat' and 'External Chat'. Below them is a search bar labeled 'Contact/Session' with a magnifying glass icon and a plus sign. A list of chat sessions is shown below. The first session is with 'Ashley Gardner', who has a green status indicator and a message 'OK'. To the right of the name is a yellow circle with the number '10'. A context menu is open over this chat session, showing three options: 'Mute notifications' (with a bell icon), 'Remove' (with a trash can icon), and 'Clear chat history' (with a document icon). A yellow box highlights the 'Mute notifications' option. A yellow circle with the letter 'a' is next to the '10' in the chat list, and a yellow circle with the letter 'b' is next to the 'Mute notifications' option in the menu.	<p>a. Right click on the chat. b. Click <b>Mute notifications</b>.</p> <p>The chat is muted and marked with ; You can still receive messages in the muted chat but will NOT be notified upon receiving new messages. If there are new messages, the chat will be marked with a red dot instead of the number of unread messages.</p>

Operation	Instruction
<p>Figure 2. <b>Unmute notifications for a chat</b></p> 	<p>a. Right click on the chat.</p> <p>b. Click <b>New message notifications</b>.</p> <p>When there are new messages, you will receive new message notifications.</p>

## Enable or Disable Notification Sound for Simu Connect Chat

By default, Simu Connect Web Client plays a sound to notify you when a new message arrives. You can decide whether to enable the notification sound or not.

### Procedure

1. Log in to Simu Connect Web Client, go to **Preferences > Features**.
2. In the **Notifications** section, select or unselect the checkbox of **Play sound for new messages** to enable or disable the notification sound.
3. Click **Save**.

## Enable or Disable Pop-up Notification for Simu Connect Chat

### Enable pop-up notification for Simu Connect chat

When a new message arrives your extension, a pop-up notification can be displayed on Simu Connect Web Client and on your desktop to notify you. You can decide where to display a pop-up notification for new messages:



- [Enable pop-up notification on Simu Connect Web Client](#)
- [Enable pop-up notification on a web browser](#)

### Enable pop-up notification on Simu Connect Web Client

To receive pop-up notifications for new messages while you are working on Simu Connect Web Client, follow the steps below.

1. Log in to Simu Connect Web Client, go to **Preferences > Features**.
2. In the **Notifications** section, select the checkbox of **New message notifications**.
3. Click **Save**.

A pop-up notification and a notification icon for new messages will be displayed while you are working on Simu Connect Web Client.



#### Note:

If you are working on **Chat** interface, a pop-up notification will NOT be displayed.

### Enable pop-up notification on a web browser

To receive pop-up notifications when you are NOT active on Simu Connect Web Client page, make sure all the followings are ready:

**Table 1.**

Platform	Requirements
Simu Connect Web Client	<ul style="list-style-type: none"> <li>• Stay logged in</li> <li>• <b>New message notifications</b> is enabled.</li> </ul>
Web browser	<ul style="list-style-type: none"> <li>• Stay open</li> <li>• Allow notifications from web browser               <ul style="list-style-type: none"> <li>◦ Google Chrome</li> <li>◦ Microsoft Edge</li> <li>◦ Opera</li> </ul> </li> </ul>

Upon receiving a new message, you will see a pop-up notification as the following figure displayed at the bottom-right corner of your desktop.

## **Disable pop-up notification for Simu Connect chat**

To avoid constant distraction by pop-up notifications, you can disable the notifications.

1. Log in to Simu Connect Web Client, go to **Preferences > Features**.
2. In the **Notifications** section, unselect the checkbox of **New message notifications**.
3. Click **Save**.

Upon receiving a new message, you will NOT receive pop-up notifications from Simu Connect Web Client or web browser.

# CTI

## Simu Connect Web Client CTI Overview

Simu Connect Web Client can be used in softphone mode or CTI mode. This topic describes what is softphone mode and CTI mode and what call operations you can perform in each mode.

### **Softphone mode**

A softphone is a software-based phone that is equivalent to a traditional desk phone, which allows you to make and receive calls over the Internet via a computer. A softphone not only has all the features of a deskphone, but also has additional features typical for online messaging, such as chat, video call, extension presence, etc.

If you don't have a desk phone in the office, you can set Simu Connect Web Client to softphone mode. In this way, you can perform the following operations to manage phone calls on your computer:

- Make/End a call
- Make a second call
- Answer/Reject a call
- Mute/Unmute a call
- Transfer a call (attended transfer and blind transfer)
- Record a call
- Hold/Resume a call
- Swap hold
- Add participant
- Merge calls
- Call flip
- And more

### **CTI mode**

Computer Telephony Integration (CTI) connects a computer with a telephone system, which allows you to manage phone calls right on a computer.

If you prefer a desk phone or Simu Connect Desktop Client for communication, you can set Simu Connect Web Client to CTI mode. In this way, Simu Connect Web Client acts as a visual control panel on which you can perform the supported call operations, whereas calls are made and received from the connected desk phone / Simu Connect Desktop Client.

You can control IP phones and Simu Connect Desktop Client via Simu Connect Web Client CTI. Supported operations to manage calls via CTI vary from the connected endpoint. Refer to the following table for details.


**Note:**

- For CTI-compatible phones, see [Compatible Yealink IP phones](#), [Compatible Fanvil IP phones](#), [Compatible Snom IP phones](#), and [Compatible Grandstream IP phones](#).
- Video call and function key are not supported under CTI mode.

**Table 2. Supported call operations**

Operations	Compatible Yealink / Fanvil / Snom / Grandstream IP phones	Other IP phones	Simu Connect Desktop Client
Make/End a call	√	√	√
Make a second call	√	×	√
Answer a call	√	×	√
Reject a call	√	√	√
Hold/Resume a call	√	√	√
Mute/Unmute a call	×	×	×
Blind transfer a call	√	√	√
Attended transfer a call	√	×	√
Record a call	√	√	√
Swap hold	√	×	√
Add participant	×	×	√
Merge calls	×	×	√
Flip a call	√	×	√

**Table 3. Compatible Yealink IP phones**

Phone Model	Firmware Version
SIP-T21P_E2	52.84.0.125 or later
SIP-T21_E2	52.84.0.125 or later

**Table 3. Compatible Yealink IP phones (continued)**

Phone Model	Firmware Version
SIP-T23P	44.84.0.125 or later
SIP-T23G	44.84.0.125 or later
SIP-T27G	69.85.0.5 or later
SIP-T29G	46.83.0.120 or later
SIP-T30P	124.85.0.15 or later
SIP-T31	124.85.0.15 or later
SIP-T31P	124.85.0.15 or later
SIP-T31G	124.85.0.15 or later
SIP-T33P	124.85.0.15 or later
SIP-T33G	124.85.0.15 or later
SIP-T31W	124.86.0.75 or later
SIP-T34W	124.86.0.75 or later
SIP-T40P	54.84.0.125 or later
SIP-T40G	76.84.0.125 or later
SIP-T41P	36.83.0.120 or later
SIP-T42G	29.83.0.120 or later
SIP-T46G	28.83.0.120 or later
SIP-T48G	35.83.0.120 or later
SIP-T41S	66.85.0.5 or later
SIP-T42S	66.85.0.5 or later
SIP-T46S	66.85.0.5 or later
SIP-T48S	66.85.0.5 or later
SIP-T41U	108.85.0.39 or later
SIP-T42U	108.85.0.39 or later
SIP-T43U	108.85.0.39 or later
SIP-T46U	108.85.0.39 or later
SIP-T48U	108.85.0.39 or later
SIP-T44U	108.86.0.90 or later
SIP-T44W	108.86.0.90 or later
SIP-T52S	70.84.0.70 or later

**Table 3. Compatible Yealink IP phones (continued)**

Phone Model	Firmware Version
SIP-T54S	70.84.0.70 or later
SIP-T53	96.85.0.5 or later
SIP-T53W	96.85.0.5 or later
SIP-T54W	96.85.0.5 or later
SIP-T57W	96.85.0.5 or later
T64LTE	132.86.0.25 or later
T67LTE	132.86.0.35 or later
SIP-T56A	58.83.0.15 or later
SIP-T58	58.85.0.5 or later
SIP-T58W	150.86.0.5 or later
VP59	91.85.0.5 or later
AX83H	180.86.0.5 or later
AX86R	180.86.0.5 or later

**Table 4. Compatible Fanvil IP phones**

Phone Model	Firmware Version
X1S/X1SP	2.2.12 or later
X1SG	2.2.12 or later
X3SG	2.2.12 or later
X3U	2.2.12 or later
X2/X2P	2.14.0.7386 or later
X2C/X2CP	2.14.0.7386 or later
X3S/X3SP/X3G	2.14.0.7386 or later
X4/X4G	2.14.0.7386 or later
X4U	2.2.11 or later
X4U-V2	2.12.1 or later
X5U	2.2.11 or later
X5U-V2	2.12.1 or later
X5S	2.2.1 or later
X6	2.2.1 or later

**Table 4. Compatible Fanvil IP phones (continued)**

Phone Model	Firmware Version
X6U	2.2.11 or later
X6U-V2	2.12.1 or later
X7	2.2.11 or later
X7C	2.2.11 or later
X7A	2.2.0.229 or later
i56A	2.8.13 or later
A32	2.6.0.408 or later
A32i	2.6.0.408 or later
X210	2.2.11 or later
X210i	2.2.11 or later
X7-V2	2.12.1.3 or later
X7C-V2	2.12.1.3 or later
X210-V2	2.12.1.3 or later
X210i-V2	2.12.1.3 or later
V65	2.12.2.4 or later
X3S/X3SP Lite	2.4.5 or later
X3S/X3SP Pro	2.4.5 or later
X3SW	2.4.5 or later
X3SG Lite	2.4.5 or later
X3SG Pro	2.4.5 or later
X3U Pro	2.4.5 or later
V62	2.4.10 or later
V63	2.12.16.19 or later
V64	2.4.10 or later
A320	2.6.0.1402 or later
A320i	2.6.0.1402 or later
V67	2.6.0 or later
X301	2.12.2 or later
X301G	2.12.2 or later
X301W	2.12.2 or later

**Table 4. Compatible Fanvil IP phones (continued)**

Phone Model	Firmware Version
X303	2.12.2 or later
X303G	2.12.2 or later
X303W	2.12.2 or later
X305	2.12.1.6 or later
X303-2 WIRE	1.0.3 or later
W610W	2.12.0 or later
W611W	2.12.4.8 or later
V61G	2.12.18.8 or later
V61W	2.12.18.8 or later
V62G	2.12.18.8 or later
V62W	2.12.18.8 or later
V66 Pro	2.12.18.4 or later
V66	2.12.18.4 or later
V62 Pro	2.12.18.2 or later
W710D	1.16.2 or later
A308i	2.6.10.1177 or later
H603W	2.14.0.11 or later
V50P	2.12.20.4 or later
V60P	2.12.20.3 or later
V60W	2.12.20.3 or later

**Table 5. Compatible Snom IP phones**

Phone Model	Firmware Version
D120	10.1.54.13 or later
D140	10.1.148.1 or later
D150	10.1.148.1 or later
D315	10.1.73.16 or later
D335	10.1.73.16 or later
D385	10.1.73.16 or later
D710	8.9.3.80 or later



**Table 5. Compatible Snom IP phones (continued)**

Phone Model	Firmware Version
D712	8.9.3.61 or later
D713	10.1.73.16 or later
D715	10.1.33.33 or later
D717	10.1.73.16 or later
D720	8.9.3.80 or later
D725	10.1.175.16 or later
D735	10.1.73.16 or later
D785	10.1.73.16 or later
D812	10.1.184.14 or later
D815	10.1.184.14 or later
D862	10.1.137.15 or later
D865	10.1.137.15 or later
SP800	10.1.169.15 or later

**Table 6. Compatible Grandstream IP phones**

Phone Model	Firmware Version
GHP610W	1.0.1.71 or later
GHP611W	1.0.1.71 or later
GHP620W	1.0.1.71 or later
GHP621W	1.0.1.71 or later
GHP630W	1.0.1.71 or later
GHP631W	1.0.1.71 or later
WP825	1.0.11.67 or later

## Control a Yealink IP Phone by Simu Connect Web Client

By enabling CTI mode on Simu Connect Web Client, a Yealink IP phone with your extension registered can be connected to your Simu Connect Web Client. In this way, Simu Connect Web Client acts as a visual control panel where you can do operations to manage phone calls from Simu Connect Web Client, while calls are made and received using the Yealink IP phone.

## Applications

This topic is applied to [the Yealink IP phones that are compatible with Simu Connect Web Client CTI](#).

**Tip:**

For incompatible IP phones, refer to [Control an Incompatible IP phone by Simu Connect Web Client](#) for instructions on phone control.

## Requirements

**PBX server**

The **uaCSTA** feature is enabled (**PBX Settings > SIP Settings > Advanced > Other Options > Enable uaCSTA Connection**).

**IP phone**

The extension registered on the IP phone is the same as that of Simu Connect Web Client.

**Note:**

Register only one account on the IP phone, or CTI feature may not work.

## Step 1. Set the IP phone to be controllable

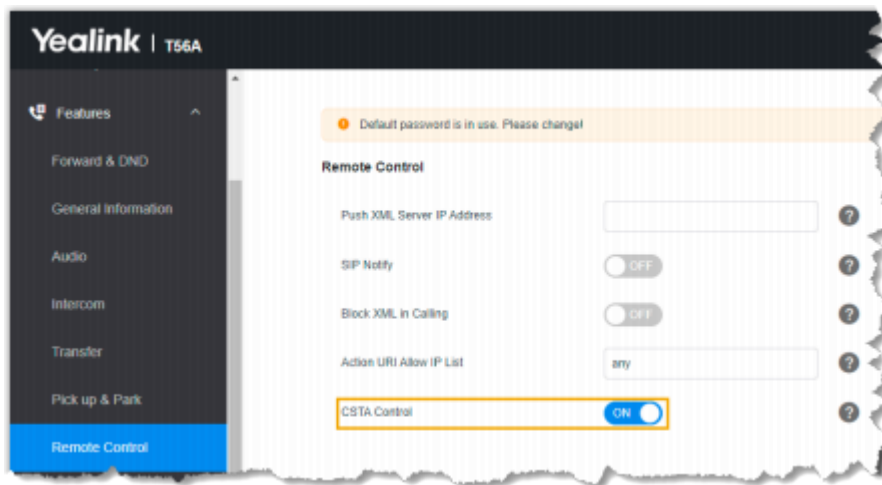
**Note:**

If system administrator has assigned your extension to the IP phone via Auto Provisioning, your IP phone is ready for being controlled. In this case, you can directly [enable CTI mode on Simu Connect Web Client](#).

If system administrator registers your extension to the IP phone manually, do as follows to set the IP phone to be controllable.

The following instructions take Yealink T56A as an example to show how to enable CSTA control function.


1. Log in to the phone web interface.
2. Go to **Features > Remote Control**.
3. On the **Remote Control** page, turn on the option **CSTA Control**.

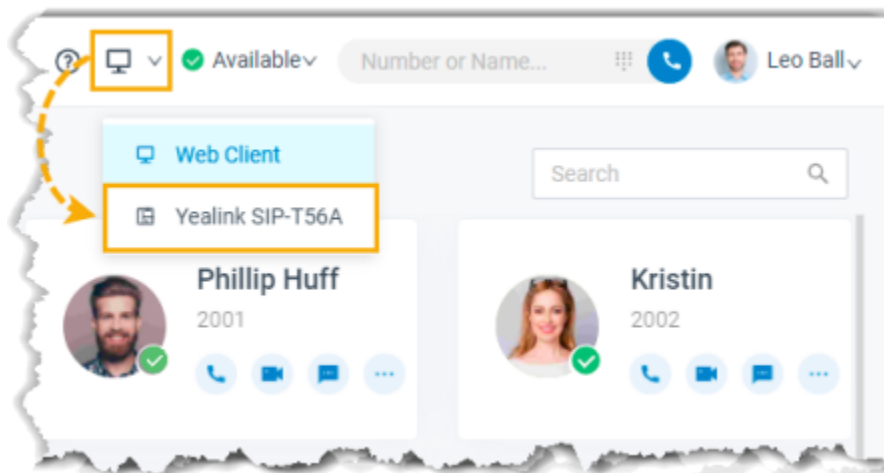


4. Click **Confirm**.
5. In the pop-up dialog box, click **OK** to reboot the phone.

## Step 2. Enable CTI mode on Simu Connect Web Client

Change Simu Connect Web Client to CTI mode, so that you can use Simu Connect Web Client to manage phone calls on your IP phone.

1. Log in to Simu Connect Web Client.
2. At the top-right corner, click , then select the connected Yealink IP phone from the drop-down list.



## Result

You can do the following operations on the connected Yealink IP phone from Simu Connect Web Client:

- Make/End a call
- Make a second call
- Answer/Reject a call
- Record a call
- Transfer a call (attended transfer and blind transfer)
- Hold/Resume a call
- Swap hold
- Flip a call

## Control a Fanvil IP Phone by Simu Connect Web Client

By enabling CTI mode on Simu Connect Web Client, a Fanvil IP phone with your extension registered can be connected to your Simu Connect Web Client. In this way, Simu Connect Web Client acts as a visual control panel where you can do operations to manage phone calls from Simu Connect Web Client, while calls are made and received using the Fanvil IP phone.

### Applications

This topic is applied to [the Fanvil IP phones that are compatible with Simu Connect Web Client CTI](#).

**Tip:**

For incompatible IP phones, refer to [Control an Incompatible IP phone by Simu Connect Web Client](#) for instructions on phone control.

### Requirements

**PBX server**

The **uaCSTA** feature is enabled (**PBX Settings > SIP Settings > Advanced > Other Options > Enable uaCSTA Connection**).

**IP phone**

The extension registered on the IP phone is the same as that of Simu Connect Web Client.

**Note:**

Register only one account on the IP phone, or CTI feature may not work.

## Step 1. Set the IP phone to be controllable

**Note:**

If system administrator has assigned your extension to the IP phone via Auto Provisioning, your IP phone is ready for being controlled. In this case, you can directly [enable CTI mode on Simu Connect Web Client](#).


If system administrator registers your extension to the IP phone manually, do as follows to set the IP phone to be controllable.

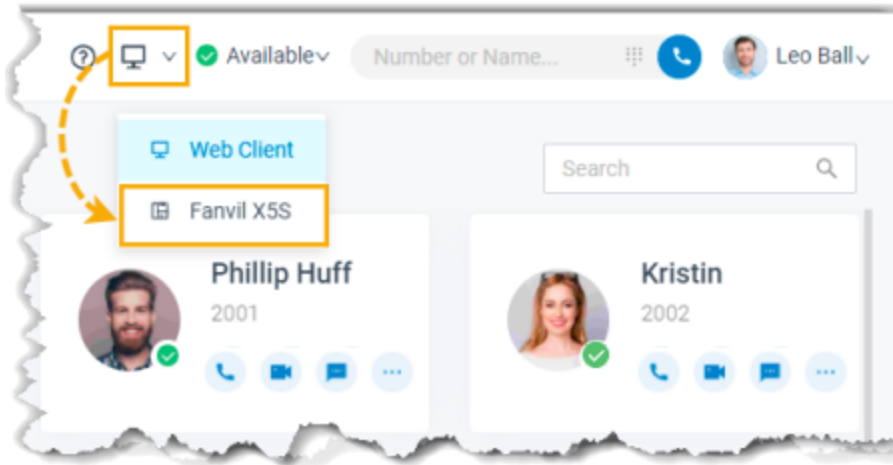
The following instructions take Fanvil X5S as an example to show how to enable uaCSTA feature and configure a uaCSTA number.

1. Log in to the phone web interface, go to **Line > SIP**.
2. In the **Line** drop-down list, select your extension.
3. Expand the **Advanced Settings** menu, enter your extension number in the **uaCSTA Number** field.
4. Expand the **SIP Global Settings** menu, select the checkbox of **Enable uaCSTA**.
5. Click **Apply**.

## Step 2. Enable CTI mode on Simu Connect Web Client

Change Simu Connect Web Client to CTI mode, so that you can use Simu Connect Web Client to manage phone calls on your IP phone.

1. Log in to Simu Connect Web Client.
2. At the top-right corner, click , then select the connected Fanvil IP phone from the drop-down list.



## Result

You can do the following operations on the connected Fanvil IP phone from Simu Connect Web Client:

- Make/End a call
- Make a second call
- Answer/Reject a call
- Record a call
- Transfer a call (attended transfer and blind transfer)
- Hold/Resume a call
- Swap hold
- Flip a call

## Control a Snom IP Phone by Simu Connect Web Client

By enabling CTI mode on Simu Connect Web Client, a Snom IP phone with your extension registered can be connected to your Simu Connect Web Client. In this way, Simu Connect Web Client acts as a visual control panel where you can do operations to manage phone calls from Simu Connect Web Client, while calls are made and received using the Snom IP phone.

## Applications

This topic is applied to the [Snom IP phones that are compatible with Simu Connect Web Client CTI](#).

**Tip:**

For incompatible IP phones, refer to [Control an Incompatible IP phone by Simu Connect Web Client](#) for instructions on phone control.

**Requirements****PBX server**

Contact system administrator to make sure the following requirements are met on the PBX server:

- The version of PBX server is 84.13.0.25 or later.
- The **uaCSTA** feature is enabled (**PBX Settings > SIP Settings > Advanced > Other Options > Enable uaCSTA Connection**).

**IP phone**

The extension registered on the IP phone is the same as that of Simu Connect Web Client.

**Note:**

Register only one account on the IP phone, or CTI feature may not work.

**Step 1. Set the IP phone to be controllable****Note:**

If system administrator has assigned your extension to the IP phone via Auto Provisioning, your IP phone is ready for being controlled. In this case, you can directly [enable CTI mode on Simu Connect Web Client](#).

If system administrator registers your extension to the IP phone manually, do as follows to set the IP phone to be controllable.

The following instructions take Snom D735 as an example to show how to enable CSTA control function.


1. Log in to the phone web interface, go to **Setup > Advanced > QoS/Security**.
2. In the **Security** section, enable the **Allow CSTA Control**.

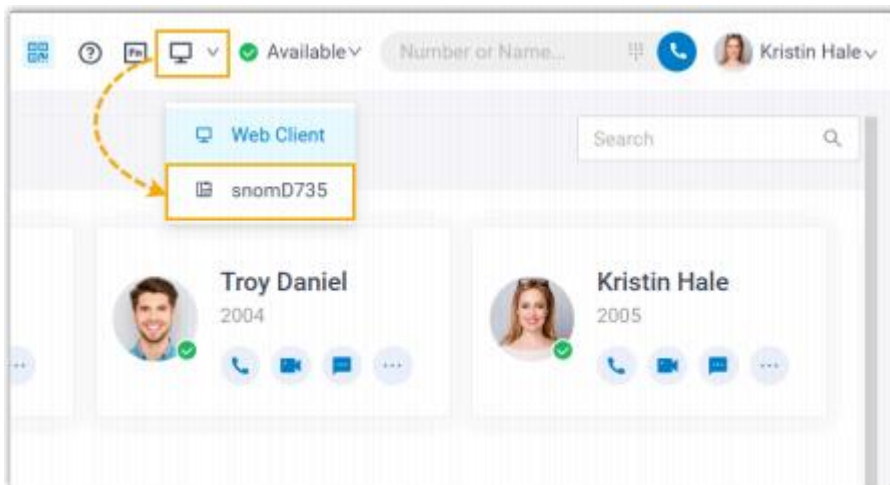
The screenshot shows the configuration interface for the Simu Connect Web Client. The left sidebar contains a navigation menu with sections like 'Operation' (Home, Directory), 'Setup' (Preferences, Speed Dial, Function Keys, Identities 1-12, Action URL Settings, Advanced, Certificates, Software Update), and 'Security'. The main content area has tabs for 'Network', 'Behavior', 'Audio', 'SIP/RTP', 'QoS/Security', and 'Update'. The 'QoS/Security' tab is active, showing settings for Quality of Service (RTP and SIP Type of Service), VLAN (VLAN Id and Priority), PC Port (VLAN Id and Priority), IEEE 802.1X Authentication (User and Password), and Security (Ignore Security Advises, Use Hidden Tags, Restrict URI Queries, Allow CSTA Control, and Empty Client Cert). The 'Allow CSTA Control' option is highlighted with a yellow box, showing it is currently set to 'on'.

3. At the bottom of the page, click **Apply**.

## Step 2. Enable CTI mode on Simu Connect Web Client

Change Simu Connect Web Client to CTI mode, so that you can use Simu Connect Web Client to manage phone calls on your IP phone.

1. Log in to Simu Connect Web Client.
2. At the top-right corner, click , then select the connected Snom IP phone from the drop-down list.





## Result

You can do the following operations on the connected Snom IP phone from Simu Connect Web Client:

- Make/End a call
- Make a second call
- Answer/Reject a call
- Record a call
- Transfer a call (attended transfer and blind transfer)
- Hold/Resume a call
- Swap hold
- Flip a call


## Control an Incompatible IP phone by Simu Connect Web Client

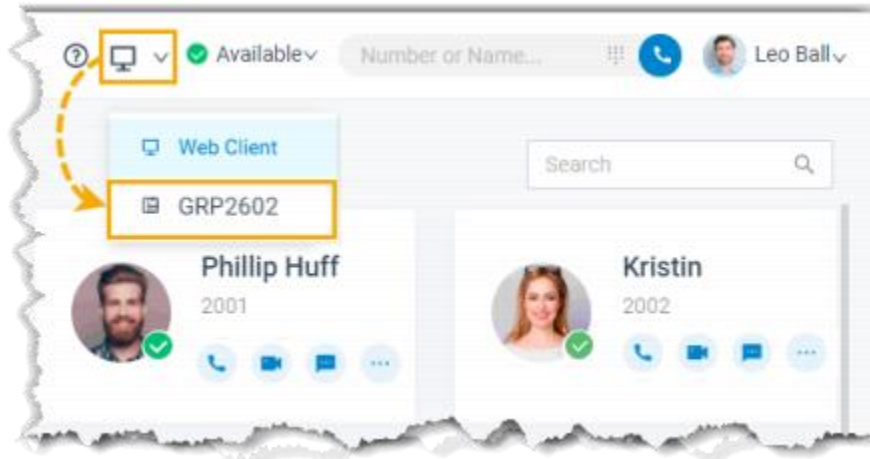
By enabling CTI mode on Simu Connect Web Client, an IP phone with your extension registered can be connected to your Simu Connect Web Client. In this way, Simu Connect Web Client acts as a visual control panel whereas calls are made and received using the IP phone.

## Applications

This topic is applied to the IP phones that fall out of the range of CTI-compatible devices. For CTI-compatible devices, see [Compatible Yealink IP Phones](#), [Compatible Fanvil IP Phones](#), [Compatible Snom IP Phones](#), and [Compatible Grandstream IP Phones](#).

## Procedure

1. Check if the extension registered on the IP phone is the same as that of Simu Connect Web Client.
2. Change Simu Connect Web Client to CTI mode.
  - a. Log in to Simu Connect Web Client.
  - b. At the top-right corner, click , then select a desired IP phone from the drop-down list.



## Result

You can do the following operations on the connected IP phone from Simu Connect Web Client:

- Make/End a call
- Reject a call
- Hold/Resume a call
- Blind transfer a call
- Record a call

## Control Simu Connect Desktop Client by Simu Connect Web Client

By enabling CTI mode on Simu Connect Web Client, Simu Connect Desktop Client with your extension logged in can be connected to Simu Connect Web Client. In this way, Simu Connect Web Client acts as a visual control panel where you can manage phone calls, while calls are made and received using Simu Connect Desktop Client.

### Scenario

Imagine that you use a CRM system to manage customer relationships and contact customers with click-to-dial via Simu Connect Web Client, but the CRM system has limited internet access. When you access your work computer from home and click to dial in the CRM system, you may experience audio quality issues due to poor network conditions.


In this case, you can install and log in to Simu Connect Desktop Client with your extension on your home computer, then access your work computer to set Simu Connect Web Client to remotely control Simu Connect Desktop Client via CTI. In doing so, audio streams will be routed through Simu Connect Desktop Client, thus ensuring better audio quality.

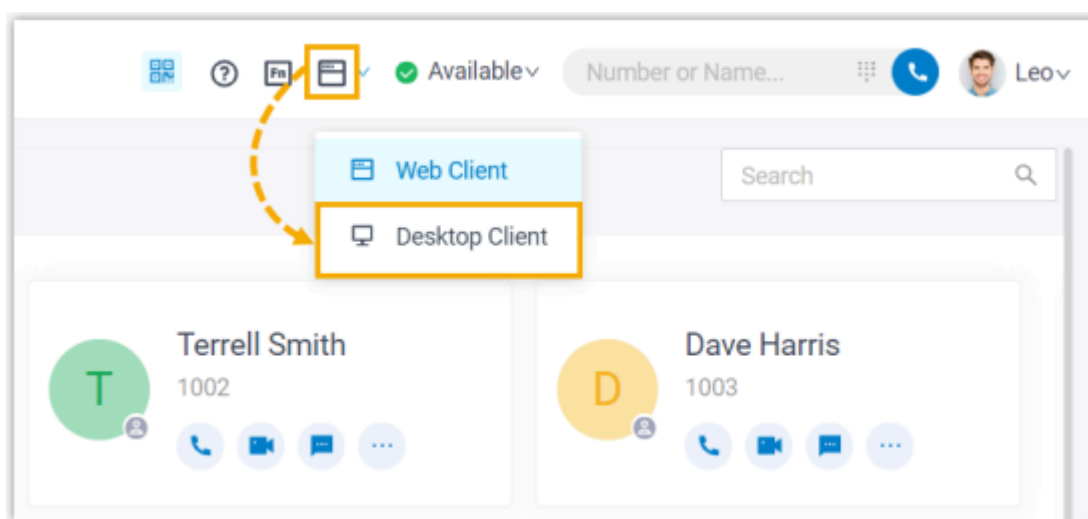
## Requirements

Make sure that PBX server and your Simu Connect clients meet the following requirements:

Item	Requirement
PBX Server	<ul style="list-style-type: none"> <li>The firmware version is 84.15.0.74 or later.</li> <li>The <b>uaCSTA</b> feature is enabled (Path: <b>PBX Settings</b> &gt; <b>SIP Settings</b> &gt; <b>Advanced</b> &gt; <b>Other Options</b> &gt; <b>Enable uaCSTA Connection</b>).</li> </ul>
Simu Connect Desktop Client	<ul style="list-style-type: none"> <li>The version is 1.5.4 or later.</li> <li>The extension logged in to Simu Connect Desktop Client is the same as that of Simu Connect Web Client.</li> </ul>

## Procedure

1. Log in to Simu Connect Web Client.
2. At the top-right corner, click , then select **Desktop Client** from the drop-down list.



## Result

You can do the following operations on Simu Connect Desktop Client from Simu Connect Web Client:

- Make/End a call
- Make a second call
- Answer/Reject a call
- Transfer a call (attended transfer and blind transfer)

- Record a call
- Hold/Resume a call
- Swap hold
- Add participant
- Merge calls
- Flip a call

# Calls

## Web Call Overview

Simu Connect Web Client allows you to have audio calls or video calls with colleagues and external contacts anywhere anytime. This topic describes requirements of Simu Connect web calls.

### Requirements

#### PBX Server

To use audio service, contact system administrator to check if PBX server meets the following requirements:

- **Web Server Protocol:** HTTPS
- **Codec:** Any one of **u-law**, **a-law**, or **G722** is enabled on PBX server.

To use video service, besides the above requirements, make sure the followings are ready on PBX server.

- **PBX Plan:** Ultimate Plan
- **Codec:** Either **VP8** or **H264** is enabled on PBX server.



#### Note:

- Codec **VP8** is preferred.
- If **VP8** and **H264** are both enabled, make sure **VP8** has the top priority.

#### Web Browser

Use one of the following web browsers with compatible version to access Simu Connect Web Client:

- Google Chrome (64-bit): Version 87 or later.
- Microsoft Edge (64-bit): Version 87 or later.
- Opera: Version 72 or later.

# Make an Audio Call

There are multiple ways for you to make an audio call to a colleague or an external contact.

This topic describes how to make an audio call on Simu Connect Web Client.

## Prerequisites

- Make sure the [requirements](#) for web call are met.
- [Audio is ready.](#)

## Make an audio call from Dialpad

**Enter a number to dial out from Dialpad**


1. Use one of the following ways to enter a number:
  - In the top search bar, enter a number.



### Tip:

If you make an audio call to a colleague or an external contact whose information is stored in your **Contacts**, you can also enter a name, an email address, or a company name.

- Click , enter a number.


2. Press **Enter** key or click  to call out.



### Tip:

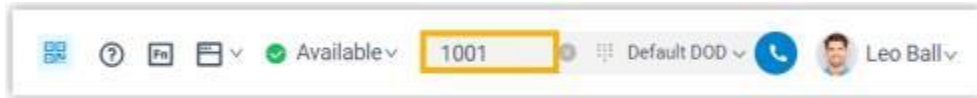
If you make an audio call to a colleague or an external contact whose information is stored in your **Contacts**, you can also click the matched contact card to call out.

**Redial the last number dialed from Dialpad**

1. When the search bar is empty, click .





The search bar automatically populates with the last number dialed, as shown below.



2. Click  again to call out.



## Make an audio call from Extensions list

1. On the left navigation bar, click **Extensions**.
2. Find a desired colleague:
  - a. In the drop-down list of , select the group to which the colleague belongs.
  - b. In the search bar, enter a name, a number, or an email address.
3. Place a call to the desired colleague.
  - To call the colleague's extension number, click  to call out.
  - To call the colleague's mobile number, click **...** and select **Call Mobile**.





### Tip:

You can also right click the contact card, and click **Call** or **Call Mobile** to call out.

## Make an audio call from Contacts list

1. On the left navigation bar, click **Contacts**.
2. Find a desired contact:



- a. In the drop-down list of , select the directory to which the contact belongs.
  - b. In the search bar, enter a name, a number, an email address, or a company name.
3. Click  to call out.



**Tip:**

You can also right click the contact card, and click **Call** to call out.

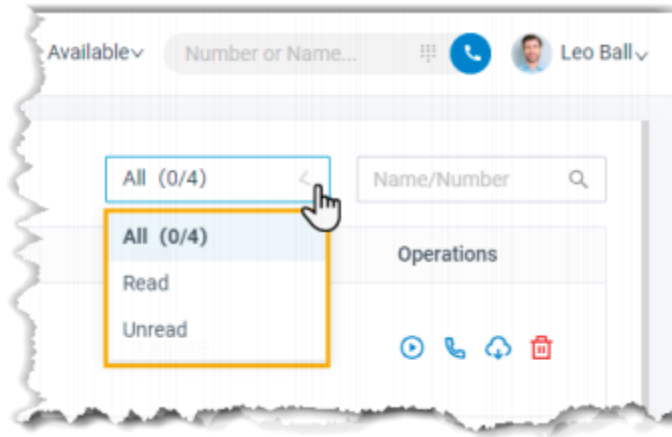
## Make an audio call from Call Logs


1. On the left navigation bar, click **Call Logs**.
2. **Optional:** To filter call logs, select a communication type from the drop-down list of .
3. Double click the record or click  to call out.




## Make an audio call from Voicemails

1. On the left navigation bar, click **Voicemails**.
2. **Optional:** To filter voicemails, you can do as follows:
  - a. Select which status of voicemail messages you want to check.



- b. In the search bar, enter the caller's name or number.
3. Double click the record or click  to call out.

## Make an audio call from Recordings

1. On the left navigation bar, click **Recordings**.
2. **Optional:** To filter recording files, enter a name or a number in the top-right search bar.
3. In the search bar, enter a name or a number.
4. Double click the record or click  to call out.

## Make a Video Call

You can make a video call to a colleague or a contact whose information is stored in your **Contacts**. This topic describes how to make a video call.

### Prerequisites

- Make sure the [requirements](#) for web call are met.
- [Audio and video are ready.](#)

## Make a video call from Dialpad

### Procedure


1. Use one of the following ways to enter a number:


- In the top search bar, enter a number.



**Tip:**

You can also enter a name, an email address, or a company name.

- Click  , enter a number.

2. Click  to place the call out.

### Result

Camera is automatically turned on. After the video call is answered, you can see each other.



**Note:**


If video call is not supported or allowed on the callee's side, an audio call will be established when the call is answered.

## Make a video call from Extensions list

### Procedure

1. On the left navigation bar, click **Extensions**.

2. Find a desired colleague:

- a. In the drop-down list of , select the group to which the colleague belongs.
- b. In the search bar, enter a name, a number, or an email address.

3. Click  to call out.



**Tip:**

You can also right click the contact card, and click **Video Call** to call out.

**Result**

Camera is automatically turned on. After the video call is answered, you can see each other.



**Note:**

If video call is not supported or allowed on the callee's side, an audio call will be established when the call is answered.

## Answer or Reject a Call

This topic describes how to answer or reject a call on Simu Connect Web Client.

### Prerequisites

- You have logged in to Simu Connect Web Client.
- The following settings are ready on Simu Connect Web Client.
  - [Audio and video](#) are ready.



**Note:**

Video settings require support from your organization's PBX server.

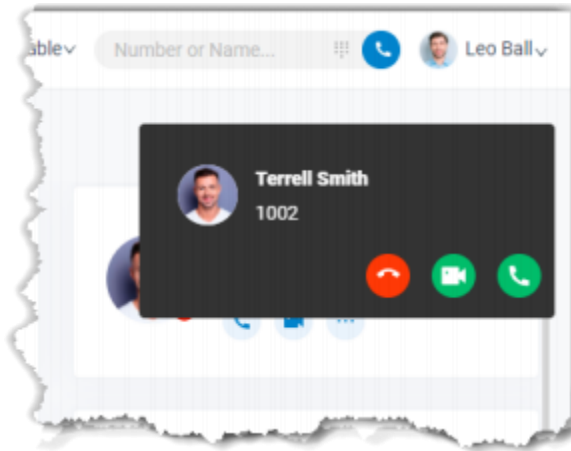
- **Call Waiting** feature is enabled.
- **Simu Connect Web Client** is enabled in [Ring Strategy](#).
- The following settings are ready, or you may not receive calls timely.
  - Notification from web browser is allowed.
  - [Set Simu Connect Web Client to Run at Startup on a Computer](#)



### Answer a call


When there is an incoming call reaching your extension, you can answer a call as needed.

**Answer a call while you are on the Simu Connect Web Client webpage**

If an incoming call reaches your extension while you are on the Simu Connect Web Client webpage, you can answer the call as follows:



- Click  to answer an audio call.
- Click  to answer a video call.

Only when an incoming video call is received can you see .



**Note:**

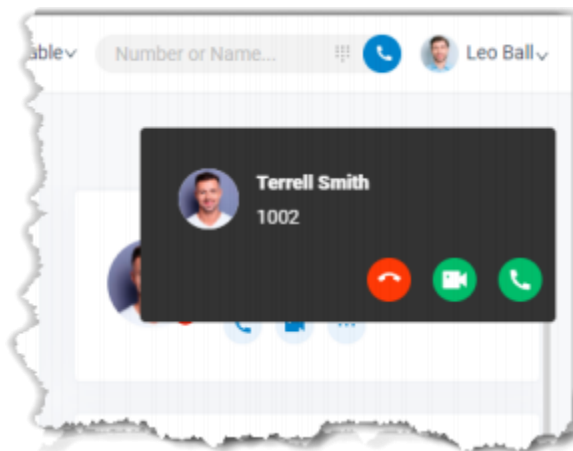
If you have been on a call before answering the new call, the previous call will be automatically held when you answer the new call.



**Answer a call while you are NOT currently on the Simu Connect Web Client webpage**


If an incoming call reaches your extension while you are NOT currently on the Simu Connect Web Client webpage, you will receive a pop-up notification from web browser, answer the call as follows.

1. Click the push notification.

You will be redirected to Simu Connect Web Client.  
2. Answer the call.



- Click  to answer an audio call.
- Click  to answer a video call.

Only when an incoming video call is received can you see .




**Note:**

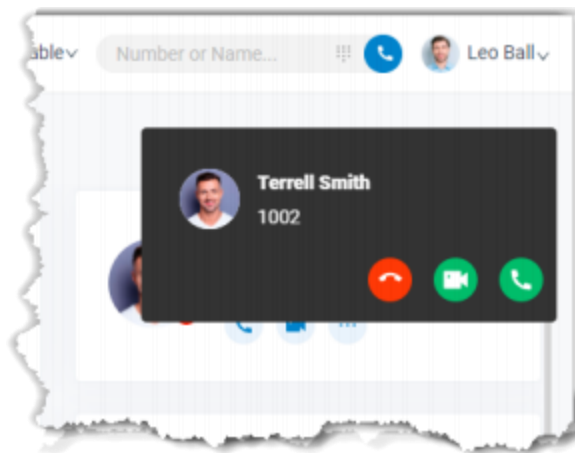
If you have been on a call before answering the new call, the previous call will be automatically held when you answer the new call.

## Reject a call

When there is an incoming call reaching your extension, you can reject a call as needed.

### Procedure


1. If you are on the Simu Connect Web Client webpage, you can click  to reject a call.

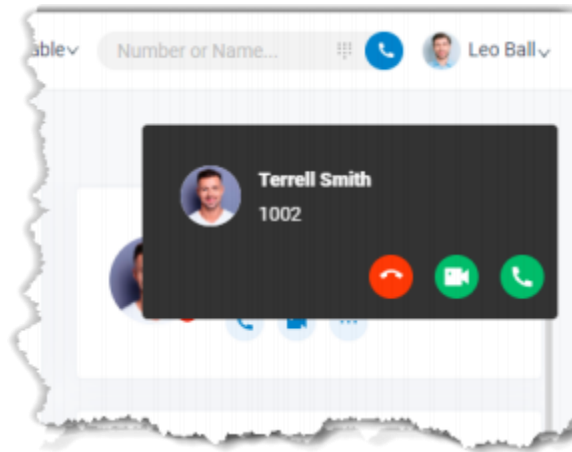


2. If you are NOT currently on the Simu Connect Web Client webpage, you can reject a call as follows:

a. Click the push notification.

You will be redirected to Simu Connect Web Client.

b. Click  to reject a call.



### Result

The caller will be routed to the destination of **No Answer**.

## Web Call Operations

This topic describes various operations that you can do for an ongoing call.



## Preview of an ongoing call



### Status bar

Display the name and number of the other party, and recording status of the call.

### Shortcuts for common actions

-  Get call window zoomed out.
-  Full screen mode.

### Toolbar

#### New Call

Place another call while you are on a call.



**Note:**



If you have been on a call before answering the new call, the previous call will be automatically held when you answer the new call.

**Add Participant**

Add participants to join an audio conference call.

**Video**

Switch between a voice call and a video call.



**Note:**

The feature requires support from your organization's PBX server. For more information, see [Video Service](#).

**Mute**

Mute or unmute yourself.

**Hold/Resume**

Hold or resume a call.



**Note:**

Allow to hold up to 6 active calls at the same time.

**Dialpad**

Press a key to send DTMF signal.

**Record**

Pause or unpause recording for a call.



**Note:**

The feature requires authentication from system administrator.

**Transfer**

- **Attended Transfer:** Transfer the call after the third party answers your call.



**Note:**

**Note:**



If you attended transfer a video call, an audio call will be established between the two parties.

- **Blind Transfer:** Transfer the call directly to the third party.

**Call Flip**

Flip an active call to a specific device where your extension is registered.

**End Call**

End a call.

## Flip an Active Call between Devices

Call Flip feature allows you to effortlessly and seamlessly flip an active call from current device to another (with your extension registered), without any interruption to the conversation.

### Scenario

Assume that you are in a call with a customer, but have to get out of the office. In this case, you can flip the call to your mobile phone, keeping talking without customer knowing the switchover.



### Requirements

- **PBX Server:** 84.8.0.25 or later

- **Extension:** Your extension has been registered on more than one device.

## Procedure

1. During an active call, click **Call Flip**.

All the other devices where your extension is registered are displayed.

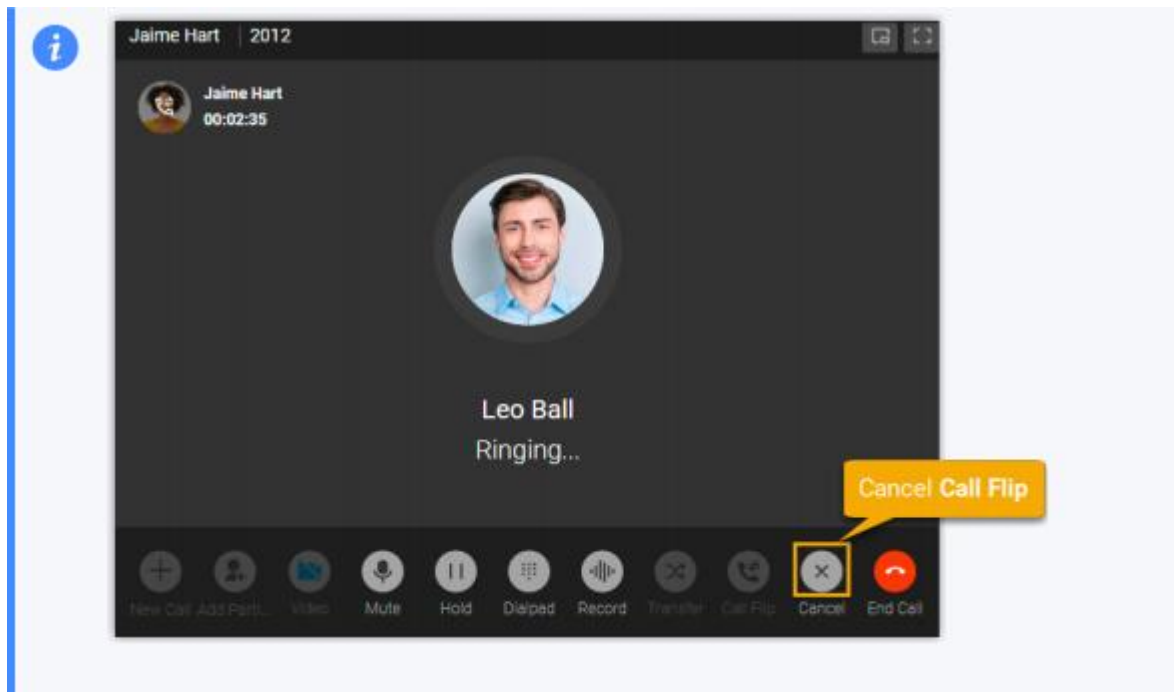
2. Click the desired device.

Simu Connect will make a call to your extension on the device.



### **Tip:**

In case you want to cancel call flip, click **Cancel** at the bottom-right corner of the call screen.



3. Answer the call on the selected device.

The call is flipped from Simu Connect Web Client to the selected device.

### Related information

[Continue an Active Call on Simu Connect Web Client](#)

## Continue an Active Call on Simu Connect Web Client

Call Switch feature allows you to retrieve an active call from the original device (with your registered extension), and continue it on Simu Connect Web Client, without any interruption to the conversation.

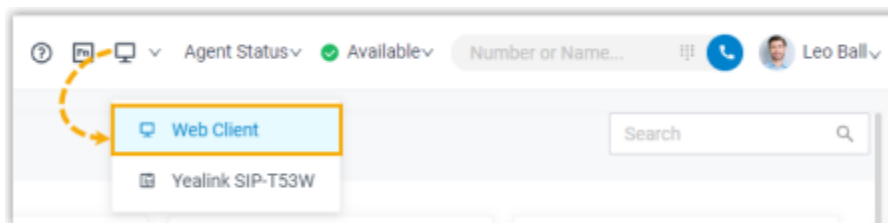
### Scenario

Assume that you answer a call from a customer while on the road, you want to be hands-free when returning to the office. In this case, you can retrieve the active call from mobile phone to Simu Connect Web Client, keeping talking without customer knowing the switchover.



## Requirements

- **PBX Server:** 84.8.0.25 or later
- **Simu Connect Web Client:** In **Web Client** mode

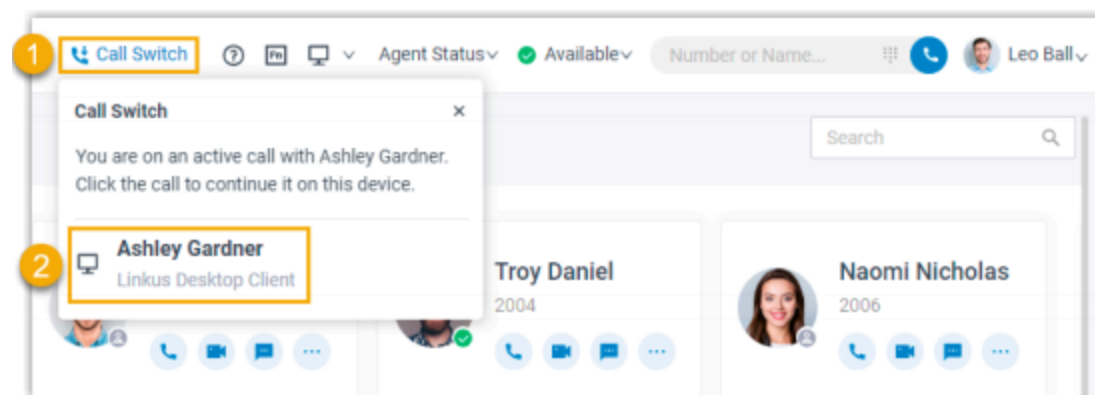


- **Extension:** Your extension has been registered on more than one device.

## Prerequisites

You have an active call on another device.

## Procedure



1. On the top of Simu Connect Web Client, click **Call Switch**.

The active call on another device is displayed.

2. Click the call.

## Result

The call is retrieved from the original device to Simu Connect Web Client.

## Related information

[Flip an Active Call between Devices](#)

# Merge Calls into an Audio Conference Call

When there are two active calls or more on Simu Connect Web Client, you can merge them into a 3-way audio conference call, and host and manage it as the conference host.

## Requirements and restrictions

### Requirements

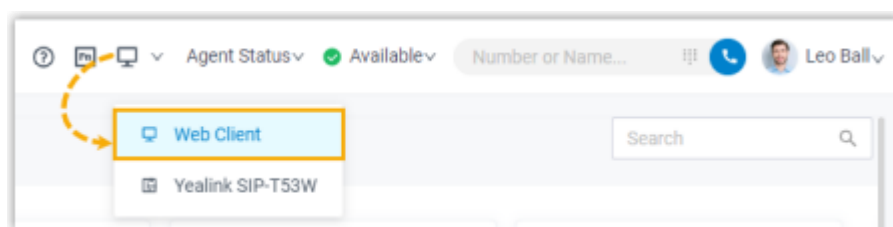
The version of PBX Server is 84.12.0.32 or later.

### Restrictions

Only calls of the same type (either both voice calls or both video calls) can be merged into an audio conference call.

## Prerequisites

- Make sure that **Simu Connect Web Client** is in **Web Client** mode.



- You have two active calls or more of the same type on Simu Connect Web Client.

## Procedure

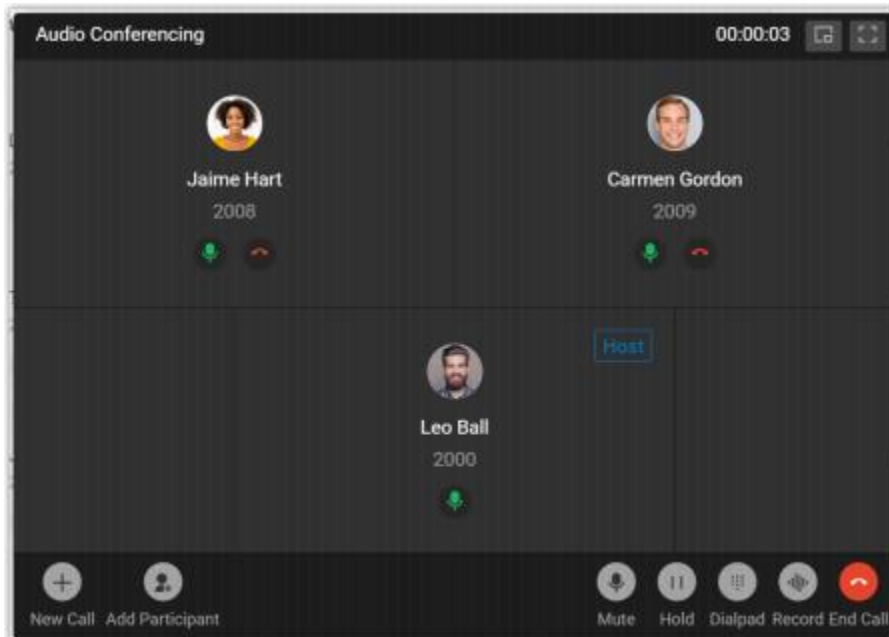
1. At the bottom of the call panel, click **Merge Calls**.

2. Perform the following operation to merge calls.

- If there are two active calls, click **Confirm** in the pop-up window.
- If there are more than two active calls, select the call that you want to merge, then click **Confirm**.

## Result

The calls are merged into a 3-way audio conference call, and you are the host.



## Related information

[Audio Conference Call Operations](#)



## Select Outbound Caller ID (DOD) to Call

Before making outbound calls from Simu Connect, you can select which outbound caller ID (DOD) to display. You can use the same DOD number for all outbound calls or select a specific DOD for each call.

### Requirements

- **PBX Server:** Version 84.16.0.25 or later
- **Extension:** Your extension has been assigned the permission to select outbound caller IDs.

### Customize DOD display

You can add a short description or adjust the order of the DODs assigned to your extension, which determines how the DODs will be displayed on your Simu Connect UC Clients.

1. Log in to Simu Connect Web Client, go to **Preferences > User > Outbound Caller ID (DOD)**.

All the selectable DODs are displayed on the list.

2. Customize DOD display as needed.

**Outbound Caller ID (DOD)**

Emergency Outbound Caller ID

☒ Allow Selecting Outbound Caller ID

**Outbound Caller IDs**

Outbound Caller ID	Outbound Caller ID Name	Trunk	Label	Move
2345068		with-41	New York Office	⬅ ⬆ ⬇ ⬇ ⬆ ⬅
2001000		with-41	London Branch	⬅ ⬆ ⬇ ⬇ ⬆ ⬅

- **Label:** Enter a short description, which is used to label the DOD number.

For example, if you enter `New York Office` for DOD **2345068**, the DOD will appear as 2345068 (New York Office) on your Simu Connect UC Clients.

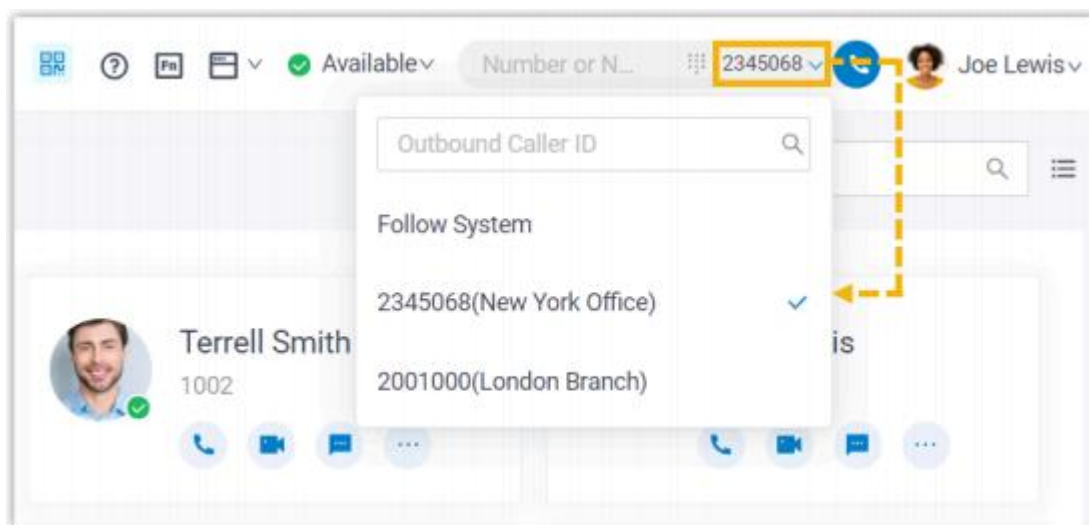
- **Move:** Click ⬅ ⬆ ⬇ ⬇ ⬆ ⬅ to adjust the order in which the DODs are displayed on your Simu Connect UC Clients.

3. Click **Save**.

## Methods of selecting DOD to call

By default, the DOD number configured by system administrator is used when you make outbound calls. You can choose to use the same DOD number for all outbound calls or select a specific DOD for each call.

- **Use the same DOD for all outbound calls:** At the top-right corner, select a desired DOD number from the drop-down list beside Dial pad.



Every time you make an outbound call using Dial pad, the DOD number will be used.

- **Select a specific DOD for each call:** Select a desired DOD number before you make an outbound call.

You can select a specific DOD number from the drop-down list beside Diapad, or from the **Contacts**, **Call Logs**, **Voicemails**, or **Recordings** page, as shown below.

Page	Instruction
Figure 3. <b>Contacts</b>	<ol style="list-style-type: none"> <li>1. Go to <b>Contacts</b> and find the desired contact.</li> <li>2. Click <b>...</b> &gt; <b>Select DOD to Call</b>, then select a specific DOD number.</li> </ol>

Page	Instruction
Figure 4. <b>Call Logs</b> , <b>Voicemails</b> , or <b>Recordings</b>	<ol style="list-style-type: none"><li>1. Go to <b>Call Logs / Voicemails / Recordings</b>.</li><li>2. Right click a desired record.</li><li>3. Click <b>Select DOD to Call</b>, then select a specific DOD number.</li></ol>

## Add Notes to a Call

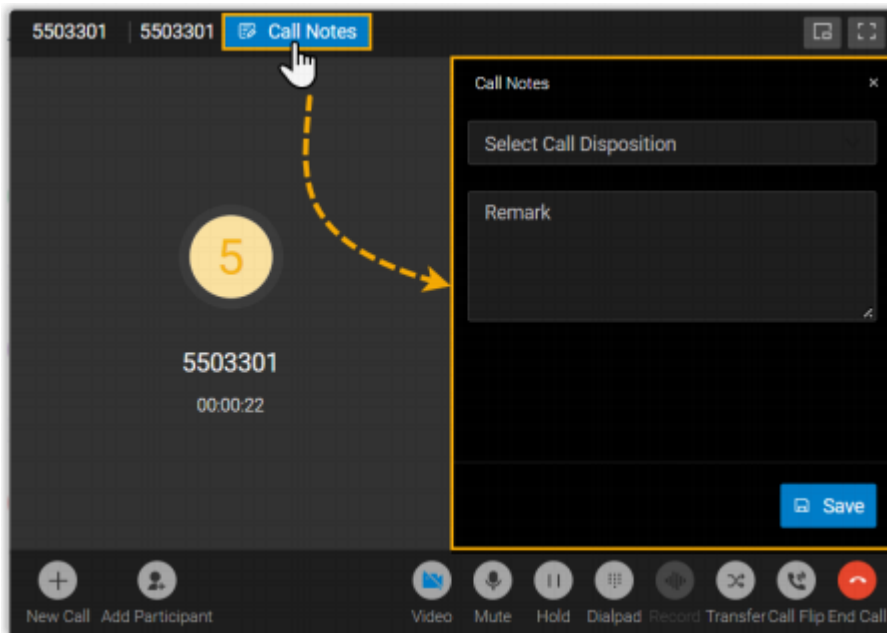
Call Note feature allows you to take notes directly during calls, and to review or edit notes in call logs after calls, helping you to capture important details for future reference.

### Requirements

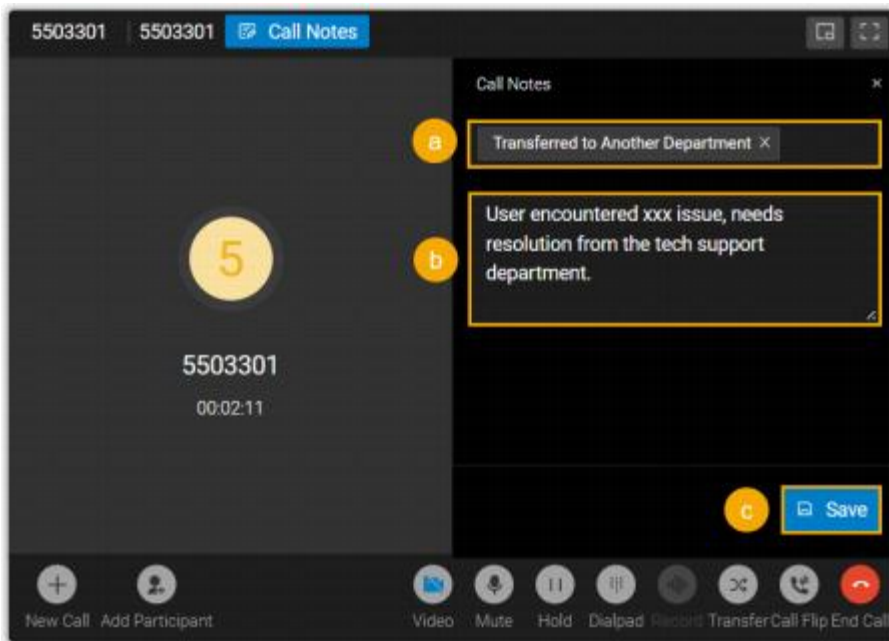
- The firmware of the PBX server is version 84.18.0.102 or later
- System administrator has configured call disposition codes on server, and granted you the permission to use call note feature.

### Procedure

1. During an active call, click **Call Notes** to open the call note panel.



2. In the side panel, add tags and remarks for the call according to your needs.



- a. In the **Select Call Disposition** drop-down list, select a disposition code.
- b. In the **Remark** field, enter short descriptions to note down essential information for the call.
- c. Click **Save**.

## Result

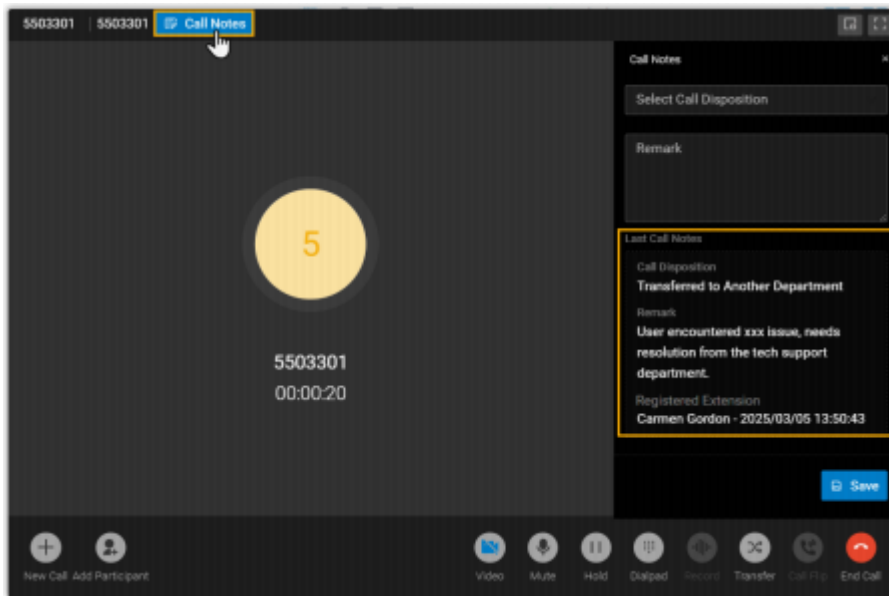
- An "Edited Successfully" prompt pops up, indicating that call note is saved successfully.



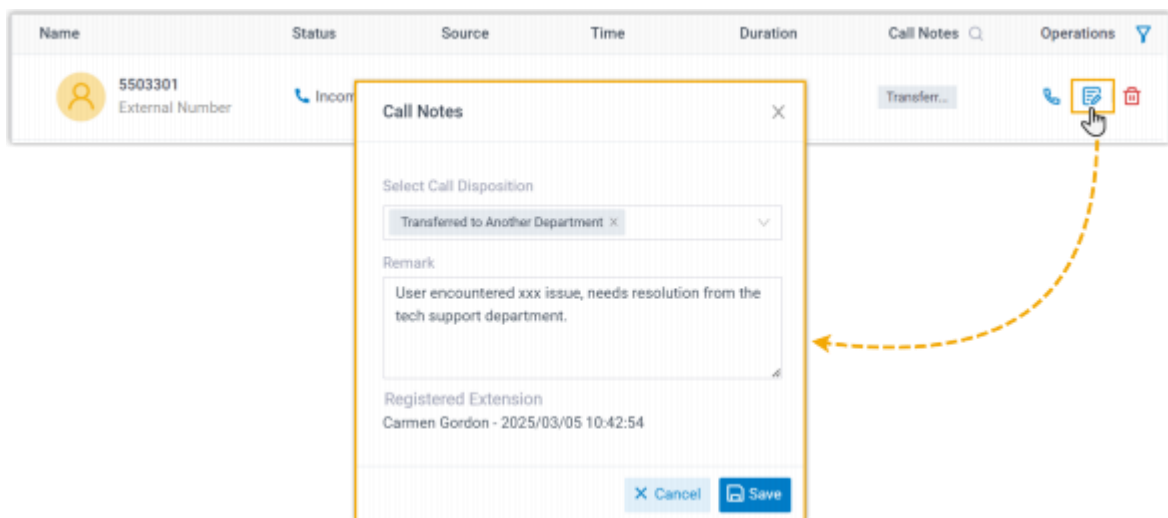
### Note:

You can modify and save the notes multiple times before the call ends.

- If the call is transferred, the next user with access to the call note feature can view the last call note after answering the call.



- After calls, you can review or edit the call notes you added in the corresponding call log (Path: **Call Logs**).



# Audio Conferencing

## Audio Conferencing Overview

Audio Conferencing is a feature that aims for instant meeting while on a call. If third party involvement is needed during a call, you can invite them to an audio conference by directly dialing their phone numbers.

### Requirements and restrictions

Before you begin, read through the requirements and restrictions for using Audio Conferencing feature.


#### Requirements

**PBX Server:** Version 84.8.0.25 or

#### later Restrictions

Up to 9 members can be on an audio conference call.

### Highlights

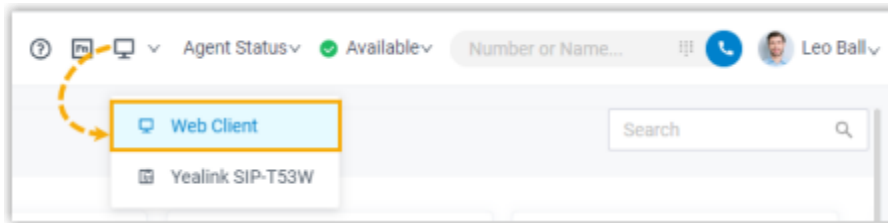
	<p><b>Instant conference calls</b></p> <p>Initiate an instant audio conference during a call, without the need for leaving the current conversation or being back in the office.</p> <p><b>Flexibly invite members</b></p> <p>Invite any members you want to the audio conference, this can be colleagues or external business partners.</p> <p><b>Easily control meeting</b></p> <p>Meeting control is at your fingertips. Operations such as mute/unmute, members add/delete, and recording enable/disable are only one-click away.</p>
---	---

# Invite Participants to an Audio Conference Call

If third party involvement is needed while on a call, you can send the invitation by directly dialing them. As soon as the invitation is sent out, the call would turn into an audio conference call.

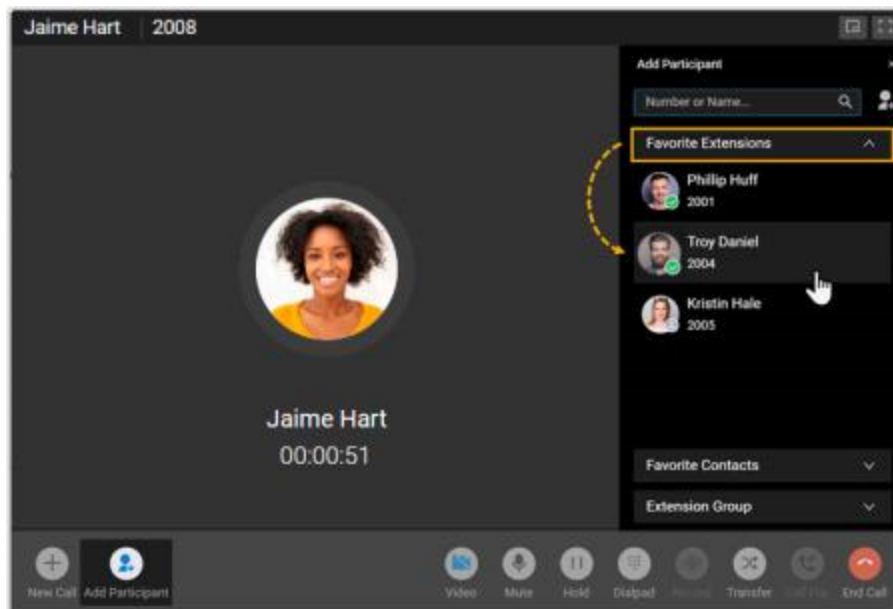
## Prerequisites

Make sure Simu Connect Web Client is in **Web Client** mode, or you can NOT invite participants to an audio conference call.

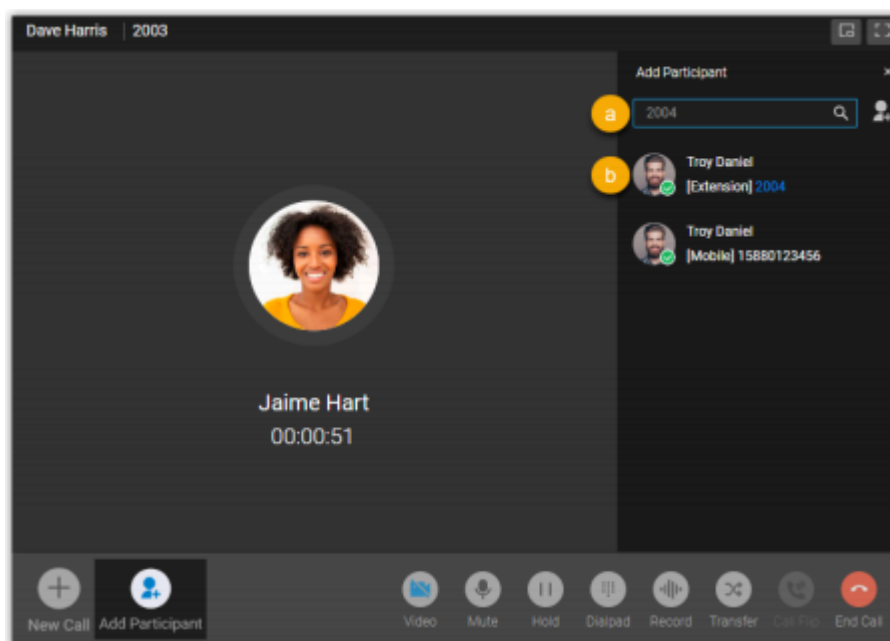


## Procedure

1. During an active call, click **Add Participant** at the bottom-left corner of the call screen.
2. On the right panel, invite participants using either of the following methods.
  - Select a list and click on the desired extension user or contact.



- To directly search specific individuals, do as follow:



- a. In the search bar, search extension users or native contacts by the supported filters, or directly invite external users by entering a phone number.

Invitee	Supported Filters
Extension Users	<ul style="list-style-type: none"> <li>Extension Name</li> <li>Extension Number</li> <li>Email Address</li> <li>Mobile Number</li> </ul>
Native Contacts	<ul style="list-style-type: none"> <li>Contact Name</li> <li>Company Name</li> <li>Email Address</li> <li>Mobile Number</li> </ul>
External Users	<ul style="list-style-type: none"> <li>External Number</li> </ul>

- b. Click on the desired individual in the search results.

## Result



- The phone call turns into an audio conference call, where you can see a call is sending to the invitee without interrupting the current conversation.

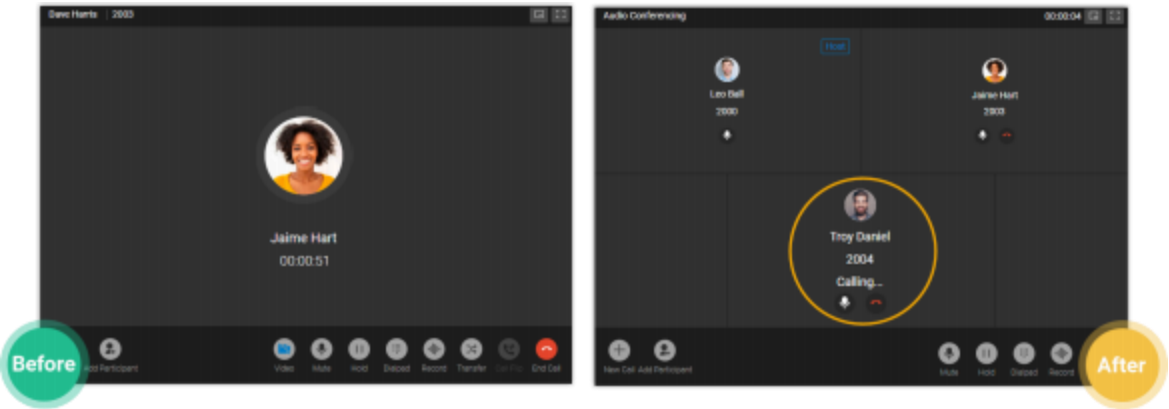


### Note:

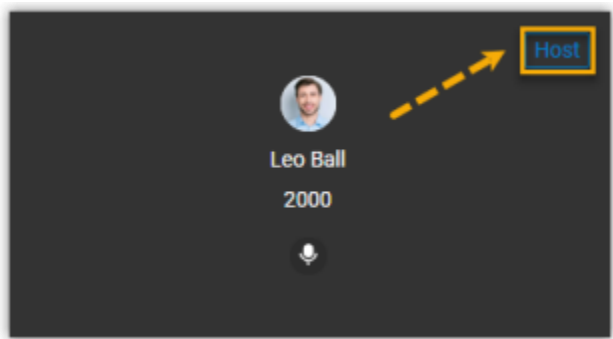
- If the invitee is an extension user that has set up call forwarding rules, Simu Connect will still keep ringing the user until timeout.



 In case you want to cancel invitation, click  under the desired invitee.



- The one who sends the call invitation first will be the conference "Host". The Host can manage the audio conference. For more information, see [Control an In-progress Audio Conference](#).



## Audio Conference Call Operations

This topic describes what operations a host and a participant can do in an audio conference call.

### Operations

Refer to the following table to check the available operations for a host and a participant in an audio conference call.

**Table 7.**

Operation	Host	Participant
Turn on/Turn off one's own audio	√	√

**Table 7. (continued)**

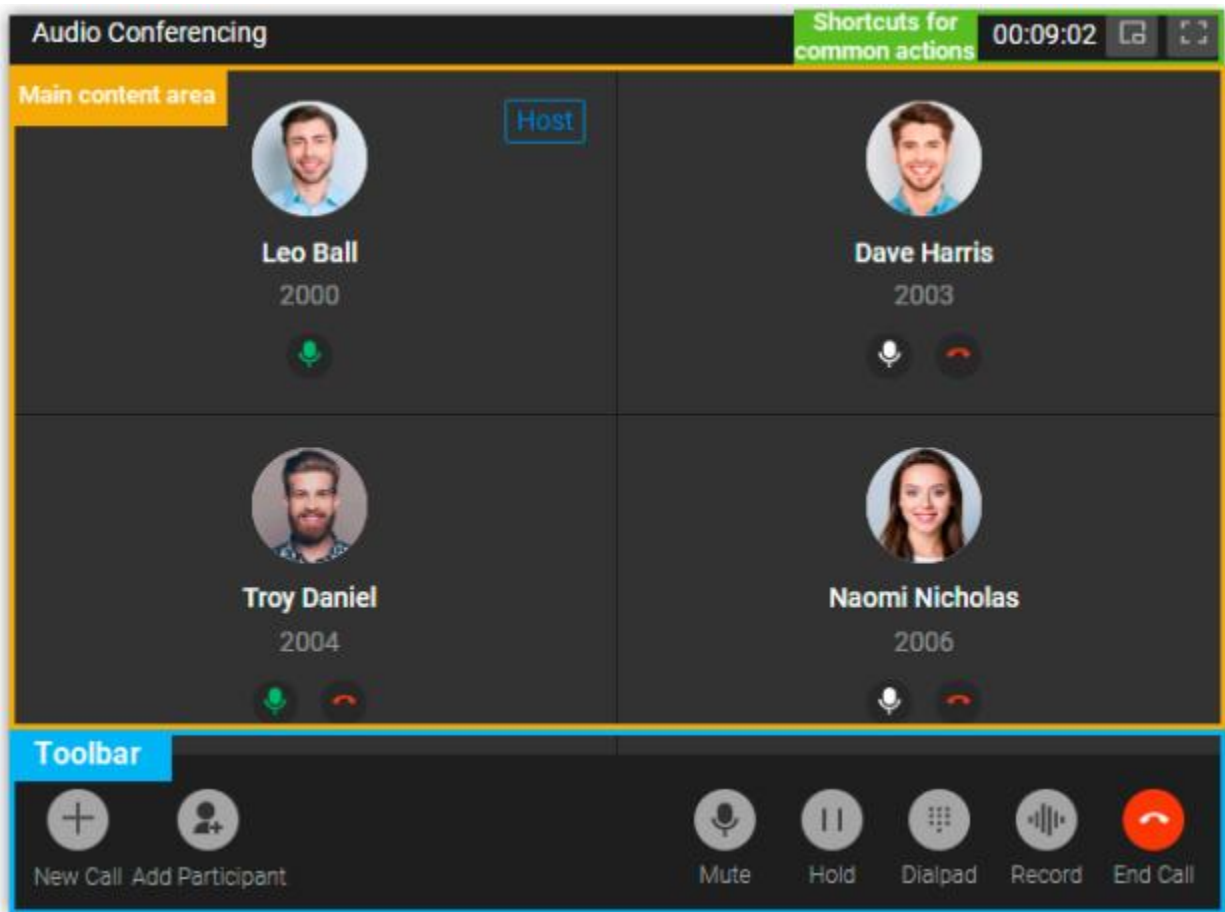
Operation	Host	Participant
Turn on/Turn off participants'audio	√	×
Record a conference	√	×
End a conference	√	×
Leave a conference	√	√
*View participants list	√	√
*Invite participants	√	√
Remove participants	√	×

**Note:**



Operations marked with \* only work for **Simu Connect Desktop Client users, Simu Connect Web Client users** and 'Cloud One BCS Simu Connect for Google' users.

## Control an In-progress Audio Conference

### Preview of an in-progress audio conference



### Shortcuts for common actions

-  Get call window zoomed out.
-  Full screen mode.

### Main content area

Display audio feed of all the participants.

If you are the host, you can manage participants as follows:


- Click  to mute or unmute a specific participant.



**Tip:**

The microphone status can be synchronized on the call screen of the following:

- **Simu Connect Mobile Client**
- **Simu Connect Desktop Client**
- **Simu Connect Web Client**
- **Cloud One BCS Simu Connect for Google**

- Click  to remove an existing participant from the audio conference, or to cancel inviting a new participant.

## Toolbar

### New Call

Place another call while you are on the audio conference call.



**Note:**

You can be on two calls at most. If you make or receive another call, the audio conference call will be automatically held.

### Add Participant

Add participants to the audio conference call.

### Mute

Mute or unmute yourself.

### Hold/Resume

Hold or resume yourself.

### Dialpad

Press a key to send DTMF signal.

### Record

Control recording for the conference call.

**Note:**

- Only the authorized conference host can control the recording during the conference call, as well as view and manage the recording file generated after the conference call ended.
- If conference host exits an audio conference call that is being recorded, the recording would stop.

**End Call**

End or leave the conference call.

**Note:**

Only the conference host can end the conference call.

## Exit or End an Audio Conference

This topic describes how to exit or end an audio conference.

### Exit an audio conference

You can exit the audio conference if you need to leave early due to unforeseen circumstances.

**Procedure**

1. If you are the host, you can exit the audio conference as follows:
  - a. On the bottom toolbar, click **End Call**.
  - b. Select **Leave Conference** and click **Confirm**.  
You exit the conference call; The audio conference is still in progress without a host, and none of the participants can invite others to join the conference.

**Note:**

If you have enabled recording for the audio conference, the recording stops as soon as you leave the conference.

2. If you are NOT the host, you can directly hang up the conference call.

## **End an audio conference**

Only the conference host can end the audio conference.

### **Procedure**

1. On the bottom toolbar, click **End Call**.
2. Select **End Conference** and click **Confirm**.

### **Result**

The conference is ended from all the participants' sides and your side.

# Video Conferencing

## Video Conferencing Overview

Cloud One BCS Video Conferencing feature allows you to have face-to-face meetings with colleagues or external contacts worldwide, which helps increase your work efficiency.

### Meeting types

There are two types of meetings: Instant Meeting and Scheduled Meeting.

#### **Instant Meeting**

Instant Meeting is a kind of meeting that starts without any prior reservation. If a task arises on short notice, you can start a meeting instantly and invite participants to join the meeting.

For more information, see [Start an Instant Meeting](#).

#### **Scheduled Meeting**

Scheduled Meeting is a kind of meeting that is created ahead of time. You can schedule a future one-time meeting and invite participants ahead of time.

For more information, see [Create a Meeting Link](#) and [Invite Participants to Join a Scheduled Meeting](#).

### Requirements

#### **PBX Server**

Contact system administrator to check if PBX server meets the following requirements:

- **PBX Plan:** Ultimate Plan
- **Web Server Protocol:** HTTPS
- **Email Server:** Either Cloud One BCS SMTP Server or a custom email server is set up on the PBX server.

#### **Web Browser**

To use Cloud One BCS Video Conferencing feature, use one of the following web browsers with compatible version to access Simu Connect Web Client:

- Google Chrome (64-bit): Version 86 or later.
- Microsoft Edge (64-bit): Version 87 or later.
- Opera: Version 72 or later.

## Restrictions

- **Participants per meeting:** Max. 5
- **Concurrent meetings in PBX server:** Max. 4
- **Meeting duration per meeting:** Max.120 min.

## Data protection and encryption

To guarantee data confidentiality during transmission, Cloud One BCS uses a transmission encryption mechanism that covers the entire data link and is based on industry-standard encryption algorithms, such as Transport Layer Security (TLS) and Secure Sockets Layer (SSL).

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The instructions on Cloud One BCS Video Conferencing feature are subject to change without notice.

Cloud One BCS makes no warranty of any kind with regard to the instructions on Cloud One BCS Video Conferencing feature, including, but not limited to, the implied warranties of merchantability and fitness for a particular purpose. Cloud One BCS shall not be liable for errors contained herein nor for incidental or consequential damages in connection with the furnishing, performance or use of the instructions on Cloud One BCS Video Conferencing feature.



# Manage Meeting Links

## Create a Meeting Link

Cloud One BCS Video Conferencing feature allows you to create a link for a future one-time meeting, and send invitation emails or invitation information to desired participants ahead of time. This topic describes how to create a meeting link.

### Procedure

1. Log in to Simu Connect Web Client, go to **Video Conferencing**.
2. Click **Create Meeting Link** and customize the following meeting details:

- **Meeting Name:** Enter a name for the meeting.
- **Meeting Time:** Set a time for the meeting.

The meeting link is valid for 48 hours from the meeting time onwards.


- **Meeting Password:** Optional. Enter a password for the meeting.

**Note:**

Password can NOT be changed once set.

All the participants are required to enter the password before they successfully join the meeting.

- **Host Password:** Retain default password or change it as needed.

By default, a 6-digit password is randomly generated. You can click  to view the password. To change the password, enter a value that contains number, upper-case, and lower-case.

**Tip:**

In case you are unavailable when it approaches meeting time, you can inform another participant of the password, so that the participant can help you host the meeting.

- **Memo:** Optional. Add a note to the meeting.

3. Click **Save**.

## Result

The meeting is displayed on **Upcoming Meetings** list and a link is generated automatically for the meeting.



### Note:

If the meeting is not started within 48 hours of the scheduled meeting time, the meeting link will be removed from the list after you refresh the page.

## What to do next


Invite participants to join the meeting.

For more information, see [Invite Participants to Join a Scheduled Meeting](#).

## Update a Scheduled Meeting

After you create a link for a future meeting, you can update the meeting information. This topic describes how to update a scheduled meeting.

## Procedure

1. Log in to Simu Connect Web Client, go to **Video Conferencing**.
2. On **Upcoming Meetings** list, click  beside the desired meeting.
3. In the pop-up window, update meeting information as needed.

- **Meeting Name:** Edit the name of the meeting.
- **Meeting Time:** Change a time for the meeting.

The meeting link is valid for 48 hours from the meeting time onwards.

- **Meeting Password:** Unchangeable.
- **Host Password:** Edit the host password.



### Note:

Enter a value that contains number, upper-case, and lower-case.

- **Memo:** Change meeting note.

4. Click **Save**.

## Result

The meeting details are updated, but the meeting link remains the same.

## What to do next

Inform participants of the change via invitation emails or invitation information.


## Delete a Scheduled Meeting

If there are changes of your work schedule, and you want to cancel a scheduled meeting, you can delete the meeting. This topic describes how to delete a scheduled meeting.

### Procedure

1. Log in to Simu Connect Web Client, go to **Video Conferencing**.

All the scheduled meetings are displayed on the page.

2. To delete a meeting, select the desired meeting, click  and **OK**.

### Result

The meeting is removed and meeting link is invalid.

## What to do next

If you have invited participants to the meeting, inform them of the change, or the participants will be prompted "The Meeting doesn't exist" when they access the meeting link.

## Start a Meeting

### Start an Instant Meeting

If a task arises on short notice, you can start an instant meeting from Simu Connect Web Client to save time without scheduling. The meeting starts instantly and you can invite participants to join the meeting. This topic describes how to start an instant meeting.

### Prerequisites



- Meet [requirements](#) for using Cloud One BCS Video Conferencing feature.
- Allow web browser to access microphone and camera in computer.

## Procedure

1. Log in to Simu Connect Web Client, go to **Video Conferencing**.
2. Click **Create Instant Meeting**.  
A window pops up, which asks permission for Simu Connect Web Client to use microphone.



### Note:

If no window pops up, you can click  or  in the address bar to check whether permissions of microphone and camera are granted to Simu Connect Web Client.

3. In the pop-up dialog box, allow Simu Connect Web Client to use microphone and camera.
  - a. Click **Allow** to allow Simu Connect Web Client to use microphone.  
The microphone is turned on.
  - b. Click **Allow** to allow Simu Connect Web Client to use camera.

The camera is turned on, you can see a preview video of yourself.






**Note:**

If you are prompted "Failed to access the camera", it indicates that the camera may be in use. Refresh the page and try again after the camera is available.

4. On **Preparation** page, set up the meeting.

a. Click a specific icon to configure audio and video on your side.

-  : Mute or unmute yourself.
-  : Enable or disable your camera.
-  : Change camera, microphone, or speaker.

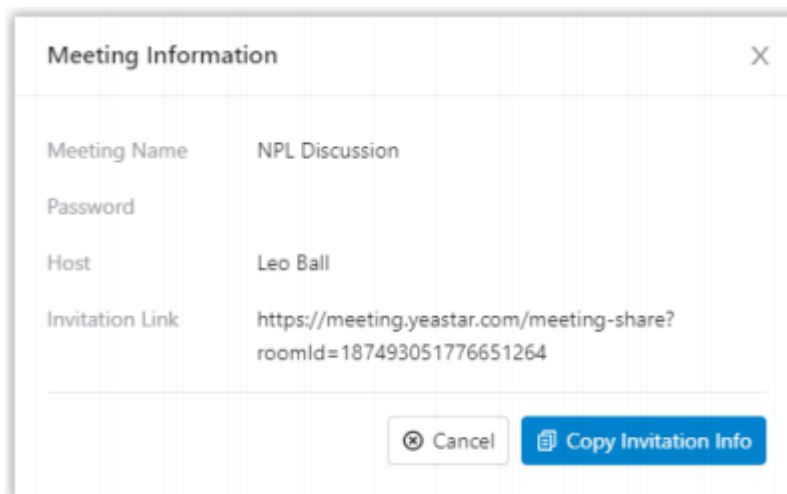
b. Configure basic information for the meeting.

- **Meeting Name:** Set a name for the meeting.
- **Password:** Optional. Enter a password for the meeting.

All the participants are required to enter the password before they successfully join the meeting.

c. Click **Join**.

The meeting is created. You can preview meeting information in the pop-up window.



A screenshot of a 'Meeting Information' pop-up window. The window has a title bar with 'Meeting Information' and a close button (X). It contains a table with the following data:

Meeting Name	NPL Discussion
Password	
Host	Leo Ball
Invitation Link	https://meeting.yeastar.com/meeting-share?roomId=187493051776651264

At the bottom right of the window, there are two buttons: 'Cancel' (with a close icon) and 'Copy Invitation Info' (with a copy icon).

5. Invite participants to join the meeting.
  - a. In the pop-up window, click **Copy Invitation Info**.
  - b. Send the invitation information to desired participants.

## Start a Scheduled Meeting as the Host

When it approaches the scheduled meeting time, either meeting creator or a participant who has host password can start the meeting. This topic describes how to start a scheduled meeting as the host.


### Start a scheduled meeting on Simu Connect Web Client

By default, meeting host is the one who creates the meeting link. If you have created a meeting link, you can start the meeting on Simu Connect Web Client.

#### Prerequisites



[Allow web browser to access microphone and camera in computer.](#)

#### Procedure

1. Log in to Simu Connect Web Client, go to **Video Conferencing**.
2. On **Upcoming Meetings** list, click  beside the desired meeting.  
A window pops up, which asks permission for Simu Connect Web Client to use microphone.



**Note:**

If no window pops up, you can click  or  in the address bar to check whether permissions of microphone and camera are granted to Simu Connect Web Client.

3. In the pop-up window, allow Simu Connect Web Client to use microphone and camera.
  - a. Click **Allow** to allow Simu Connect Web Client to use microphone.

The microphone is turned on.
  - b. Click **Allow** to allow Simu Connect Web Client to use camera.




## Screen shoot

The camera is turned on, you can see a preview video of yourself.



### Note:

If you are prompted "Failed to access the camera", it indicates that the camera may be in use. Refresh the page and try again after the camera is available.

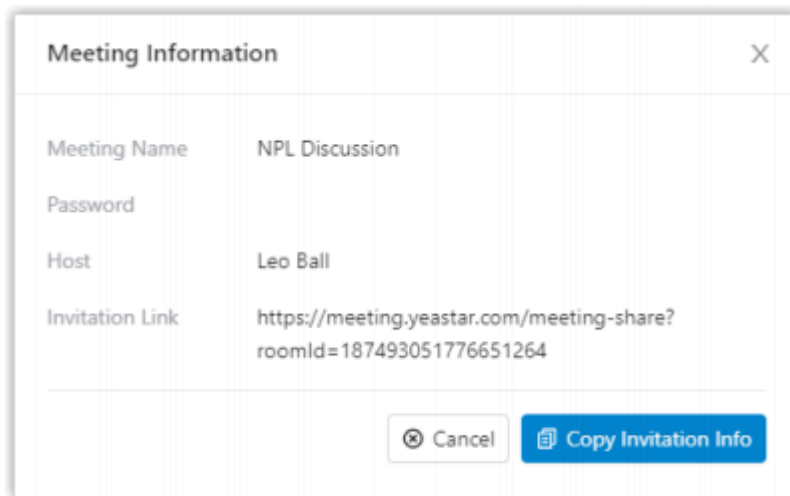
4. In the **Preparation** page, set up initial configurations and check basic information for the meeting.
  - a. Click a specific icon to configure audio and video on your side.
    -  : Mute or unmute yourself.
    -  : Enable or disable your camera.
    -  : Change camera, microphone, or speaker.
  - b. Check basic information for the meeting.
    - **Meeting Name**
    - **Host Password**
    - **Memo**

5. Click **Start**.

## Result

You have joined the meeting and you can preview or copy meeting information in the pop-up window.





A dialog box titled "Meeting Information" with a close button (X) in the top right corner. It contains the following fields:

Meeting Name	NPL Discussion
Password	
Host	Leo Ball
Invitation Link	<a href="https://meeting.yeastar.com/meeting-share?roomId=187493051776651264">https://meeting.yeastar.com/meeting-share?roomId=187493051776651264</a>

At the bottom right, there are two buttons: "Cancel" and "Copy Invitation Info".

## Start a scheduled meeting via an invitation link

If a meeting creator has provided you with an invitation link and a host password, you can access the invitation link, and use the host password as a credential to join the meeting. You will be the host of the meeting.


### Procedure

1. Click the invitation link to access the meeting.

You are redirected to the landing page of the meeting. A window pops up, which asks permission for `meeting.cloud one.com` to use your microphone.



#### Note:

If no window pops up, you can click  in the address bar to check whether permissions of microphone and camera are granted to `meeting.cloud one.com`.

2. In the pop-up window, allow `meeting.cloud one.com` to use your microphone and camera.

a. Click **Allow** to allow `meeting.cloud one.com` to use your microphone.

The microphone is turned on.

b. Click **Allow** to allow `meeting.cloud one.com` to use your camera.

The camera is turned on, you can see a preview video of yourself on left side of the page.

3. On right side of the page, click **Host** tab, configure basic information, audio, and video as needed.

a. Configure basic information.

- **Meeting Name:** Retain the meeting name or change it as needed.

- **Your Name:** Enter your name.

All the participants can see the name.

- **Host Password:** Enter the host password provided by the meeting creator.

- **Memo:** Retain the meeting note or change it as needed.

b. Configure audio and video on your side.

- **Camera:** Retain the default camera, or change it as needed.

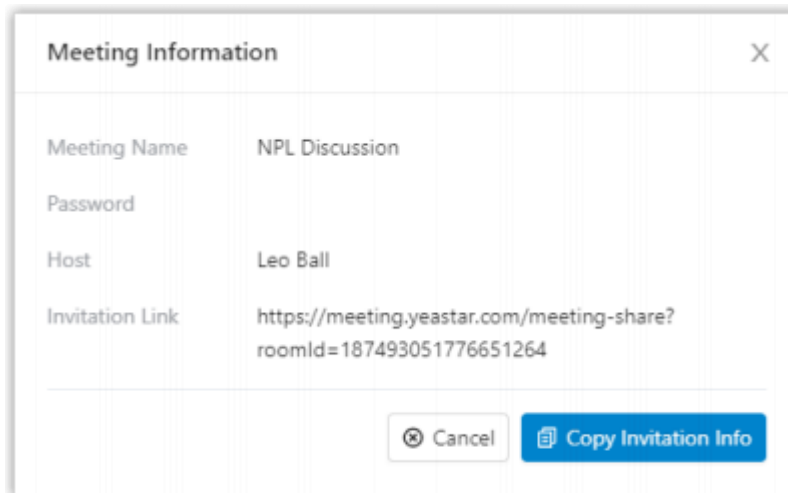
- **Microphone:** Retain the default microphone, or change it as needed.

- **Speaker:** Retain the default speaker, or change it as needed.

4. Click **Join**.

## Result

You have joined the meeting and you can preview or copy meeting information in the pop-up window.



A screenshot of a 'Meeting Information' pop-up window. The window has a title bar with 'Meeting Information' and a close button (X). The main content area is a table with the following information:

Meeting Name	NPL Discussion
Password	
Host	Leo Ball
Invitation Link	<a href="https://meeting.yeasar.com/meeting-share?roomId=187493051776651264">https://meeting.yeasar.com/meeting-share?roomId=187493051776651264</a>

At the bottom right of the window, there are two buttons: 'Cancel' and 'Copy Invitation Info'.

## Invite Participants to Join a Scheduled Meeting


This topic describes how to invite participants to join a scheduled meeting.

### Invite participants to join a scheduled meeting via system invitation emails

#### Prerequisites

- [You have created a meeting link.](#)
- An email address is associated with the participant to be invited.

#### Procedure

1. Log in to Simu Connect Web Client, go to **Video Conferencing**.
2. On **Upcoming Meetings** list, click  beside the desired meeting.  
All your colleagues and contacts are displayed on the list.
3. Invite participants to join the meeting.



#### Note:

Up to 4 participants can be in the meeting with you. We recommend that you select participants with caution.

- To invite colleagues or existing contacts to join the meeting, do as follows:
    - a. In the search bar, enter a name, a number, or an email address to find the desired colleague or contact.  
The page displays the matched colleague or contact.
    - b. Select the checkboxes of the desired colleague or contact.
  - To invite external contacts who are NOT stored in your **Contacts**, do as follows:
    - a. In the search bar, enter the email address of the contact who you want to invite.
    - b. Click any blank space to confirm.
4. Click **Invite**.

#### Result

Invitation emails are sent out to the selected participants' email addresses via your organization's email server.



**Note:**

- If all the invitation emails are failed to be sent, contact system administrator to check if email server is set up correctly.
- If part of invitation emails are failed to be sent, click **Email Sent Logs** to check details. If you don't have the permission to view **Email Sent Logs**, contact system administrator.

**What to do next**

To start the meeting, see [Start a Scheduled Meeting as the Host](#).


## Invite participants to join a scheduled meeting via invitation information

In case you want to invite specific participants when it approaches the meeting time, you can copy the invitation information, and paste the information anywhere you would like it to send out.

**Prerequisites**

[You have created a meeting link.](#)

**Procedure**

1. Log in to Simu Connect Web Client, go to **Video Conferencing**.
2. On **Upcoming Meetings** list, click  beside the desired meeting. Invitation information for the meeting is copied.
3. Send the invitation information to the desired participants.

**What to do next**

To start the meeting, see [Start a Scheduled Meeting as the Host](#).

## Join a Meeting as a Participant


If you have received an invitation email or invitation information, you can join a meeting. This topic describes how to join a meeting as a participant.

## Procedure

1. Click the invitation link to access the meeting.  
You are redirected to the landing page of the meeting. A window pops up, which asks permission for `meeting.cloud one.com` to use your microphone.



### Note:

If no window pops up, you can click  in the address bar to check whether permissions of microphone and camera are granted to `meeting.cloud one.com`.

2. In the pop-up window, allow `meeting.cloud one.com` to use your microphone and camera.
  - a. Click **Allow** to allow `meeting.cloud one.com` to use your microphone.  
The microphone is turned on.

- b. Click **Allow** to allow `meeting.cloud one.com` to use your camera.

The camera is turned on, you can see a preview video of yourself on left side of the page.

3. On right side of the page, configure the following settings:

- a. If it is a scheduled meeting, click **Participant** tab.

You will join the meeting as a participant.

- b. Enter your credentials.

- **Your Name:** Enter your name.

All the participants can see the name.

- **Meeting Password:** Optional. If a meeting password is required, enter the password.

- c. Retain default camera, microphone, and speaker, or change them as needed.

4. Click **Join** to join the meeting.

## Result

If the host is not in the meeting, you have to wait for the host to join. During this period, you cannot view or hear any voice from other participants.

# Video Conference Call Operations

This topic describes what operations a host and a participant can do in an in-progress video conference call.

## Operations

Refer to the following table to check what operations a host and a participant can do in an in-progress video conference call.

**Table 8.**

Operation	Host	Participant
Turn on/Turn off/Customize one's own audio	√	√
Mute all participants	√	×
Mute specific participants	√	×
Request to turn on specific participants' audio	√	×
Turn on/Turn off/Customize one's own camera	√	√
Disable specific participants' camera	√	×
Request to turn on specific participants' camera	√	×
Share screen	√	√
Leave a meeting	√	√
End a meeting	√	×
View participants list	√	√
Invite participants	√	√
Remove participants	√	×



## Control an In-progress Meeting

### Preview of an in-progress meeting



### Shortcuts for common actions



Quick access to invitation information.



Gallery view, which shows thumbnail displays of all the participants.



Active speaker view, which shows the large video window of the speaker. Full screen mode.




## Main content area

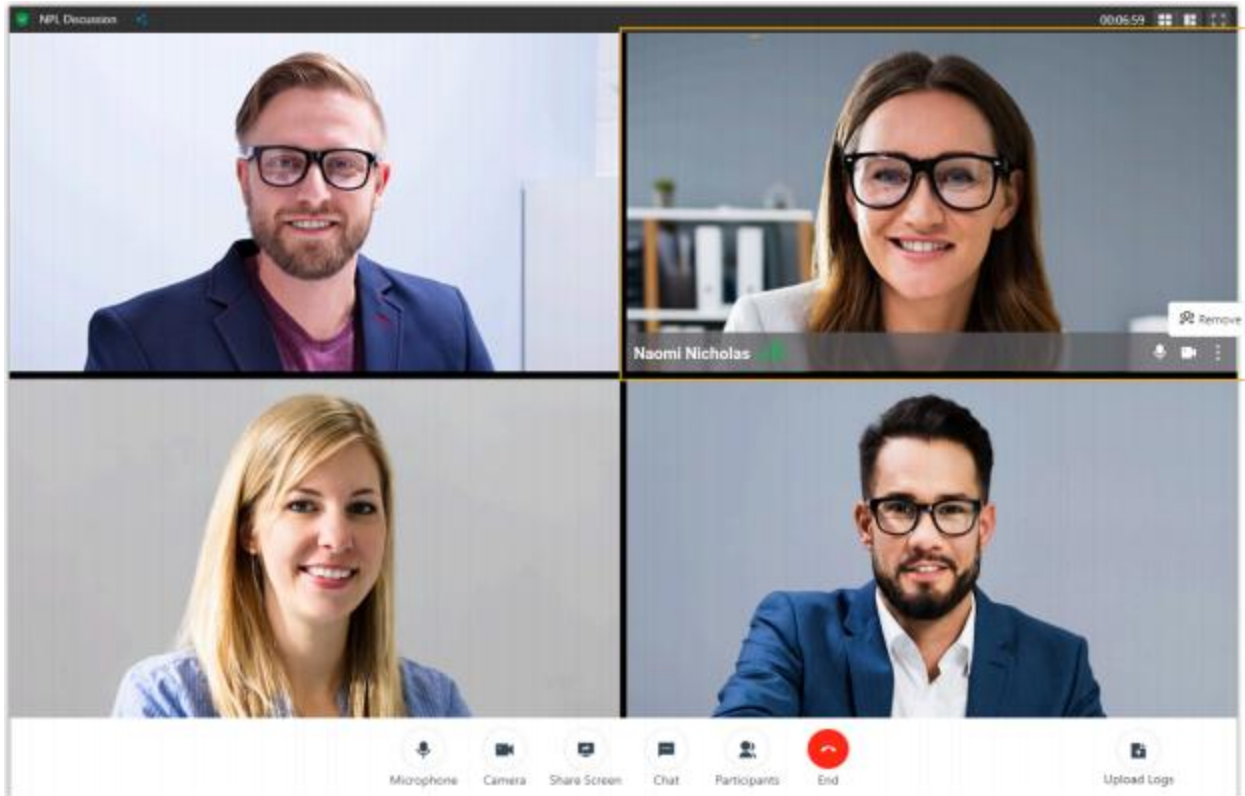
Display video feed of all the participants.

You can hover mouse over your own video feed to check network's signal strength, control your own microphone or camera.



### Note:

If you are the host, you can not only do the above operations for all the participants, but also click  and select **Remove** to remove a participant from the meeting.



## Tool bar

Access Cloud One BCS Video Conferencing tools and functions.

### Microphone

- Mute or unmute yourself.
- Select a microphone or a speaker.

### Camera

- Turn on or turn off your camera.
- Select a camera.

### Share Screen

- Share entire screen, a specific browser tab, or an application window with participants.



**Note:**

To share computer audio, select the checkbox of **Share audio**.

### Chat

- Have instant chat with participants.





### Participants

- View all the participants in the meeting.
- Manage your own microphone and camera.



**Note:**

If you are the host, you can click specific icons or options to control participants' microphones and cameras:

-  or : Directly turn off a participant's microphone or camera.
-  or : Request to turn on a participant's microphone or camera.
- **Mute All**: Mute all participants.

- Copy invitation information.

### End

- Leave the meeting.
- End the meeting.



**Note:**

Only available for the host.

## Upload logs

- Report a problem during a meeting.



### Important:

Note down information provided in the pop-up window.

## Exit or End a Meeting

This topic describes how to exit or end a meeting.

### Exit a meeting

You can exit a meeting if you need to leave early due to unforeseen circumstances.

#### Procedure

1. If you are the host, you can exit the meeting as follows:
  - a. On the bottom toolbar, click **End**.
  - b. Select **Leave Meeting** and click **OK**.  
You exit the meeting, and the next participant automatically becomes the host.
2. If you are NOT the host, you can exit the meeting as follows:
  - a. On the bottom toolbar, click **End** and **OK**.  
You exit the meeting.

## End a meeting

Only the host can end the meeting.

### Procedure

1. On the bottom toolbar, click **End**.
2. Select **End Meeting** and click **OK**.

### Result


The meeting is ended from all the participants' sides and your side.

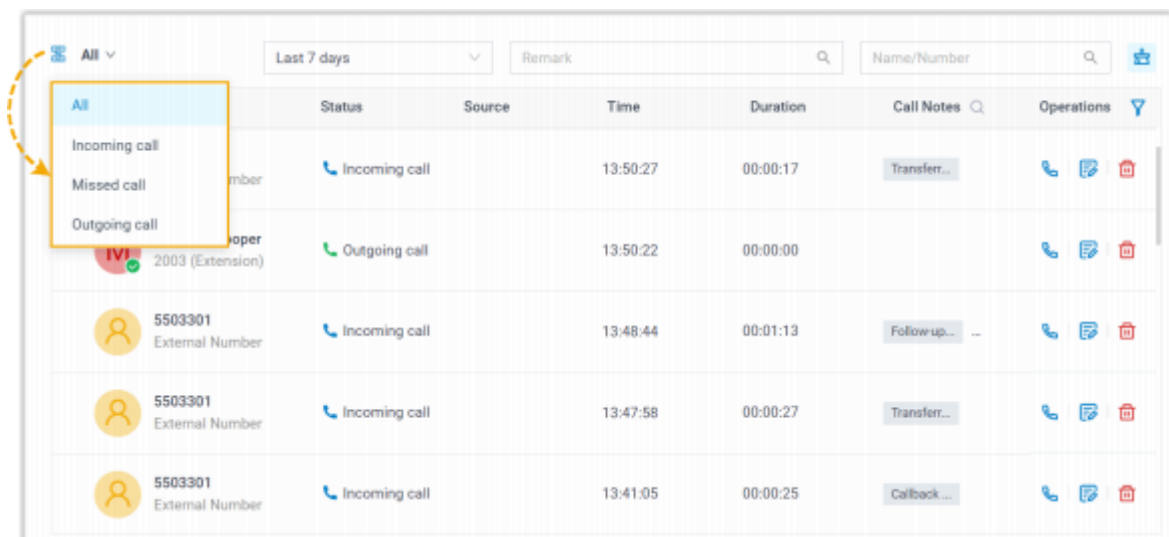
# CDR and Recordings
















## Manage Your Call Logs

This topic describes how to manage your personal call logs.

### Procedure





1. Log in to Simu Connect Web Client, go to **Call Logs**.
2. **Optional:** Select a communication type from the drop-down list of  to filter call logs.



Status	Source	Time	Duration	Call Notes	Operations
Incoming call		13:50:27	00:00:17	Transferr...	  
Outgoing call		13:50:22	00:00:00		  
Incoming call		13:48:44	00:01:13	Follow-up... ..	  
Incoming call		13:47:58	00:00:27	Transferr...	  
Incoming call		13:41:05	00:00:25	Callback...	  

3. **Optional1:** Search or filter specific call logs by name, number, time range, disposition codes, or remark.

Name	Status	Source	Time	Duration	Call Notes	Operations
5503301 External Number	Incoming call		13:50:27	00:00:17	Transfer...	Filter, Chat, Delete
Madison Cooper 2003 (Extension)	Outgoing call		13:50:22	00:00:00		Chat, Delete
5503301 External Number	Incoming call		13:48:44	00:01:13	Follow-up...	Chat, Delete
5503301 External Number	Incoming call		13:47:58	00:00:27	Transfer...	Chat, Delete
5503301 External Number	Incoming call		13:41:05	00:00:25	Callback...	Chat, Delete

4. To chat with a colleague, right click a record, then click **Chat**.
5. To check or edit call notes you added for a call, click .
6. To place a call to a colleague or an external contact, double click a call log or click .
7. To delete a personal call log, select the desired call log, click  and **OK**.
8. To delete all your personal call logs, click  on the top-right corner and click **OK**.

**Note:**

All your personal call logs are removed from Simu Connect UC Clients.

**Related information**

[Manage Queue Call Logs](#)

## Manage Your Recordings

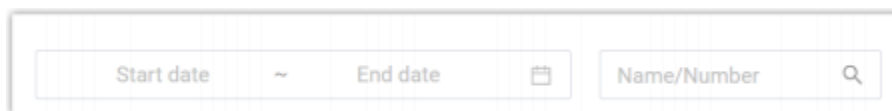
This topic describes how to view and manage your recording files.

**Prerequisites**





The system administrator has authorized you to view and manage your recording files.

## Procedure

1. Log in to Simu Connect Web Client.
2. On the left navigation bar, click **Recordings**.
3. **Optional:** Find the desired recording files by the time filter or search bar in the top- right corner.



The image shows a user interface for filtering and searching recordings. It consists of two main sections. The first section is for time filtering, with labels 'Start date' and 'End date' separated by a tilde '~'. There are calendar icons next to each date field. The second section is for searching, with a label 'Name/Number' and a magnifying glass icon.

- To filter recording files by time range, specify the time range and click **OK**.
  - To search for specific recording files, enter a name or a number in the search bar.
4. Manage recording files according to your needs.
    - To listen to a recording file, click .
    - To place a call to a colleague or an external contact, double click a record or click .
    - To download a recording file, click .
    - To delete a recording file, click  and **OK**.
    - To bulk delete recording files, select the checkboxes of the desired files, click **Delete** and **OK**.
    - To chat with a colleague, right click a record, click **Chat**.



### Tip:

You can also right click a record to perform the above operations for a specific recording file.



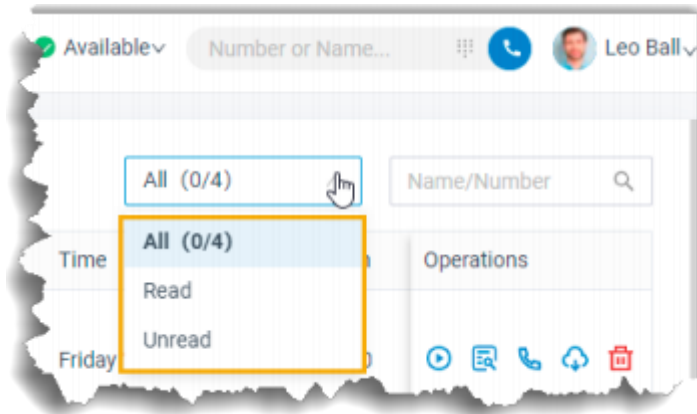
# Voicemails

## Manage Your Voicemails

This topic describes how to manage your voicemails.

### Procedure

1. Log in to Simu Connect Web Client.
2. On the left navigation bar, click **Voicemails**.
3. **Optional:** To filter voicemails, you can do as follows:
  - a. Select which status of voicemail messages you want to check.



- b. In the search bar, enter the caller's name or number.
4. Manage voicemails according to your needs.
    - To listen to a voicemail, click .
    - An unread voicemail will be marked as read.
    - To view a transcribed voicemail text, click .



#### Note:



This feature is only available when the Speech to Text (STT) API integration and Voicemail Transcription feature on the PBX are both enabled.

- To place a call to the caller, double click a record or click .
- To chat with the caller, right click a record, click **Chat**.



**Note:**

**Chat** feature is only for internal communication

- To download a voicemail, click .
- To delete a voicemail, click  and **OK**.
- To bulk delete voicemails, select the checkboxes of the desired voicemails, click **Delete** and **OK**.
- To bulk mark voicemails as read, select the checkboxes of the desired voicemails, click **Mark as read**.



**Tip:**

You can also right click a record to perform the above operations for a specific voicemail.


# Extension Preferences

## Extensions

### Configure Your Extension Profile

This topic describes how to upload personal avatar and configure account information.

#### Procedure

1. Log in to Simu Connect Web Client, go to **Preferences > User > User Information**.
2. Upload your avatar.
  - a. Click .
  - b. In the pop-up window, select an image from your computer, click **Open**.



**Note:**

The image must be `.jpg` or `.png`, and can not exceed 1MB.

- c. Click **Upload**.
3. Configure your basic information.
    - **First Name**
    - **Last Name**
    - **Email Address:** You can receive Simu Connect welcome email, voicemail messages, or event notifications via the email address.
    - **Mobile Number:** You can receive calls or event notifications on this mobile number.
    - **System Prompt Language:** Select the language of system prompts to be played to you during a call.
  4. Click **Save**.

### View Outbound Caller ID

This topic describes how to view Outbound Caller ID.

## Background information

System administrator has set up a trunk "Outbound\_US" with common Outbound Caller ID "90001". When you make outbound calls via trunk "Outbound\_US", "90001" will be displayed on the callees' phone.

If you are in close connection with customers (eg. a technical support responsible for resolving issues), system administrator may set up a specific outbound caller ID number (eg. 0592-5503301) and a specific outbound caller ID name (eg. Cloud One BCS Support) for you. In this way, customers can verify the identity of caller when receiving incoming calls.

You can check your own outbound caller ID number and outbound caller ID name on Simu Connect Web Client.



### Note:

To set another outbound caller ID (number and name), contact system administrator.

## Procedure

1. Log in to Simu Connect Web Client.
2. Go to **Preferences > User > Outbound Caller ID (DOD) > Outbound Caller IDs**.

## Result

The **Outbound Caller IDs** list displays the outbound caller ID number, outbound caller ID name, and associated trunk that system administrator has configured for you.

When you make outbound calls via the trunk, the distinctive outbound caller ID will be displayed on the callees' phone.

In this scenario, the callees' phone will display "Cloud One BCS Support <0592-5503301>".

**Outbound Caller ID (DOD)**

Emergency Outbound Caller ID

Outbound Caller IDs
 

Outbound Caller ID	Outbound Caller ID Name	Trunk
0592-5503301	Yeastar Support	Outbound_US

## View Emergency Outbound Caller ID

This topic describes how to view emergency outbound caller ID.

### Background information

Your company has purchased enhanced emergency service, and system administrator has associated your office extension with an exclusive Emergency Location Identification Number (ELIN, which is associated with your office location). When you place an emergency call by the extension, the emergency operator terminal will display your location.

**Note:**

You extension associated with ELIN should be registered on an corded IP desk phone.

You can check emergency outbound caller ID on Simu Connect Web Client.

### Procedure

1. Log in to Simu Connect Web Client.
2. Go to **Preferences > User > Outbound Caller ID (DOD) > Emergency Outbound Caller ID**.

Outbound Caller ID (DOD)
Emergency Outbound Caller ID
608522256

### Result

When you place an emergency call, the Public Safety Answering Point (PSAP) will pinpoint your location via ELIN, and arrange appropriate emergency response.

## Presence

### Presence Settings

This topic describes presence settings.

The system has built-in presence (**Available**, **Away**, **Do Not Disturb**, **Lunch Break**, **Business Trip**, and **Off Work**) to help colleagues tell if you are available. For each presence, you can configure presence settings differently. When your presence changes, the presence settings will change accordingly.

Log in to Simu Connect Web client, go to **Preferences > Presence**, select a presence and configure the following settings.

- [Presence Information](#)
- [Call Forwarding](#)
- [Ring Strategy](#)
- [Ring Timeout](#)
- [Options](#)

## Presence Information

**Table 9.**

Setting	Description
Presence Information	Add a note to the current presence.

## Call Forwarding

Call forwarding rules help you forward incoming calls to a specific destination when you are unavailable. You can set different destinations for incoming calls based on extension presence.

**Table 10.**

Setting	Description
Types of incoming calls	<p>Select a call type.</p> <ul style="list-style-type: none"> <li>• <b>Internal Calls:</b> Set a call forwarding rule for incoming calls from your colleagues.</li> <li>• <b>External Calls:</b> Set a call forwarding rule for incoming calls from external users.</li> </ul>
Forwarding condition	<p>Select a forwarding condition and configure a destination.</p> <ul style="list-style-type: none"> <li>• <b>Always:</b> Forward all incoming calls to the designated destination.</li> <li>• <b>No Answer:</b> Only forward unanswered calls to the designated destination.</li> </ul>

**Table 10. (continued)**

Setting	Description
	<ul style="list-style-type: none"> <li>• <b>When Busy:</b> Only forward the calls that come in while you are talking on the phone to the designated destination.</li> </ul>

## Ring Strategy

Ring strategy allows you to decide in which order incoming calls are distributed to the endpoints where your extension is registered.

- **Extension Endpoint:** The IP phone or softphone where your extension is registered.
- **Simu Connect Mobile Client**
- **Simu Connect Desktop Client (Softphone Only)**
- **Simu Connect Web Client (Web Client Mode Only)**


**Table 11.**

Setting	Description
Ring First	Set which endpoint will ring first.
Ring Secondly	Set which endpoint will ring secondly.

## Ring Timeout

To prevent callers from waiting for a long time, you can configure ring timeout. If a call is not answered during the time period, it will be routed to the destination of **No Answer**.

**Table 12.**

Setting	Description
Ring Timeout	<p>Enter a value or select a value from the drop-down list.</p> <div>  <b>Note:</b>  The valid range is from 5 to 300. </div>

## Options

**Ring the Mobile Number Simultaneously**


To simultaneously ring both extension and the associated mobile number when anyone calls in your extension number, you can configure a simultaneous ring strategy.



**Note:**

The feature is unavailable in **Do Not Disturb** status.

**Table 13.**

Setting	Description
Ring the Mobile Number Simultaneously	Check the option to enable this feature, and configure your mobile number.
Prefix	Enter the prefix of outbound route so that PBX server can successfully send calls out.  <div>  <p><b>Note:</b> Contact system administrator to check if a prefix is required.</p> </div>

### Accept Push Notifications

By default, you can receive push notifications on Simu Connect Mobile Client anywhere and anytime, such as missed calls, new voicemail messages and so on. If you don't want to receive notifications after work, you can disable the feature.

**Table 14.**

Setting	Description
Accept Push Notification	Enable or disable push notifications on Simu Connect Mobile Client.

### Accept calls from Ring Group

By default, you can receive ring group calls under any presence. You can set whether to receive ring group calls under the specific presence as needed.



Setting	Description
Accept calls from Ring Group	Enable or disable receive ring group calls under this presence.

### Agent Status Auto Switch



If you are a dynamic agent who needs to frequently log in to or out of a queue, you can associate your queue status with your extension presence. Your status in a queue will automatically change along with your extension presence.

**Table 15.**

Setting	Description
Log In	Log in to a queue.   <b>Note:</b> The option is available ONLY in <b>Available</b> status.
Log Out	Log out of a queue.
Pause	Pause receiving queue calls.   <b>Note:</b> You can select a specific pause reason in the <b>Pause Reason</b> drop-down list.
Do Nothing	Retain current status.

## Manually Switch Presence

This topic describes how to manually switch presence, including switch presence to a fixed status or a temporary status.

### Switch presence to a fixed status

You can switch presence to a fixed status in the following ways:

- [Switch presence to a fixed status on Simu Connect Web Client](#)
- [Switch presence to a fixed status by dialing a feature code](#)

#### Switch presence to a fixed status on Simu Connect Web Client

1. Log in to Simu Connect Web Client.
2. In the top pane, select a presence from the drop-down list of **Presence**. Related [presence settings](#) take effect.

## Switch presence to a fixed status by dialing a feature code

1. On dialpad, dial a presence's feature code.

The default feature code for each presence are listed as below:

**Note:**

Contact system administrator to check if there are changes of the feature codes.

- **Available:** \*91
- **Away:** \*92
- **Do Not Disturb:** \*93
- **Lunch Break:** \*94
- **Business Trip:** \*95
- **Off Work:** \*96

## Switch presence to a temporary status

Assume that you would be away for a scheduled meeting during which you are unavailable to answer calls, but you want calls to be forwarded to the previous destination when you are available. In case you forget to change presence, you can switch presence to a temporary status, and set how long the status will last.

### Procedure

1. Log in to Simu Connect Web Client.
2. In the top pane, select **Set Temporary Status** from the drop-down list of presence.
3. In the pop-up window, configure the following settings:

- a. In the **Change Status To** drop-down list, select a temporary status.
  - b. In the **Hour** and **Minute** drop-down list, set how long the temporary status will last.
  - c. **Optional:** In the **Set Status Message** field, add a personal note to the temporary status.
4. Click **Save**.

Related [presence settings](#) take effect.

### Result

In the top pane, hover your mouse over presence, check when the temporary status will expire.

When it comes to the expiration time, presence and relevant settings would be switched back to the previous one.

## Automatically Switch Presence Based on Business Hours and Holidays

This topic gives a configuration example to describe how to configure presence auto switch based on Business Hours and Holidays.

### Background information

You want presence to be automatically switched according to the Business Hours and Holidays.

Assume that your administrator has set Business Hours and Holidays on PBX, and you want the presence to be automatically switched according to the following time schedule:

Business Hours and Holidays	Time-based Presence
<b>Business Hours:</b> 09:00-12:00 and 14:00-18:00 from Monday to Friday.	Available

Business Hours and Holidays	Time-based Presence
<b>Break Hours:</b> 12:00-14:00 from Monday to Friday.	Lunch Break
<b>Holidays:</b> December 25 to January 5.	Off Work
<b>Outside Business Hours:</b> The time periods that are not defined as Business Hours, Break Hours, or Holidays.	Off Work

## Procedure

1. Log in to Simu Connect Web Client, go to **Preferences > Features**.
2. In the **Time-conditional Presence Auto Switch** section, configure the following presence based on the time:
  - **Business Hours:** Select a status to be displayed during office hours. In this scenario, select **Available**.
  - **Break Hours:** Select a status to be displayed during break time. In this scenario, select **Lunch Break**.
  - **Holidays:** Select a status to be displayed during holiday. In this scenario, select **Off Work**.
  - **Outside Business Hours:** Select a status to be displayed during non-office hours.  
In this scenario, select **Off Work**.
3. Click **Save**.



### Note:

The priority of presence switching at different times is: **Holidays > Break Hours > Business Hours > Outside Business Hours**.

## Result

Presence will be switched automatically according to the Business Hours and Holiday status.

For example, after 18:00, the presence displayed on Simu Connect client will be switched to **Off Work**.



### Note:

**Note:**

If someone force switches Business Hours Status, the presence will be switched according to the current Business Hours status.

For example, Business Hours status is switched from **Outside Business Hours** to **Business Hours**, the presence will be switched from **Off Work** to **Available**.

**Related information**

[Manually Switch Presence](#)

## Associate Your Queue Status with Your Extension Presence

This topic describes how to configure your queue status to change along with extension presence.

**Background information**

If you are a dynamic agent who needs to frequently log in to or out of a queue, you can configure your queue status to change along with your extension presence. For example, automatically log in to a queue when you are available to answer calls while automatically pausing service when you are away from desk.

**Procedure**

1. Log in to Simu Connect Web Client, go to **Preferences > Presence**.
2. On the status bar, select a presence status.

3. In the **Agent Status Auto Switch** drop-down list, select an action.

- **Log In**



**Note:**

The option is accessible ONLY in **Available** status.

- **Log Out**

- **Pause**



**Note:**

You can select a specific pause reason in the **Pause Reason** drop-down list.

- **Do Nothing**

4. To configure for more status, repeat **step2-3**.

5. Click **Save**.

## Result

If extension presence changes, your work status in a queue to which you belong will change accordingly.

**Note:**

This setting takes effect for all the queues to which you belong.

## Enable or Disable Simu Connect Push Notifications

This topic describes how to enable or disable push notifications on Simu Connect Mobile Client.

### Background information

If your extension receives new messages (eg. missed call, new voicemail messages, etc) while Simu Connect is running in the background on your mobile phone, the system will wake up Simu Connect on alert messages. By default, you will receive Simu Connect notifications no matter which presence (except **Do Not Disturb**) your extension is in. You can configure Simu Connect push notifications for different extension presence.

### Procedure

1. Log in to Simu Connect Web Client, go to **Preferences > Presence**.
2. To configure push notification for a specific presence, select one on the status bar.
3. In the **Options** section, select or unselect the checkbox of **Accept Push Notifications**.

4. To configure push notification for other presence, repeat **step2-3**.
5. Click **Save**.

## Voicemail

### Customize Your Voicemail Settings

The phone system supports voicemail feature, which helps you receive audio messages when you are unavailable to answer calls. You can retain default settings, or customize voicemail settings. This topic describes how to customize voicemail settings.

#### Enable or disable voicemail feature

1. Log in to Simu Connect Web Client, go to **Preferences > Voicemail**.
2. To enable voicemail feature, turn on the option **Enable Voicemail**.
3. To disable voicemail feature, turn off the option **Enable Voicemail**.
4. Click **Save**.

#### Configure voicemail Access PIN

1. Log in to Simu Connect Web Client, go to **Preferences > Voicemail**.
2. To access voicemail messages directly, select **Disabled** from the drop-down list of **Voicemail PIN Authentication**.
3. To require a PIN code to be entered when you access voicemail, select **Enabled** from the drop-down list of **Voicemail PIN Authentication**, and enter a PIN code in the **Voicemail Access PIN** field.

**Note:**

The PIN code must be number, and the length must be 3-15 digits.

4. Click **Save**.

#### Configure voicemail language

1. Log in to Simu Connect Web Client, go to **Preferences > Voicemail**.
2. In the **Voicemail Language** drop-down list, select the language of the system prompts heard by caller when they access your voicemailbox.



When callers are routed to your extension's voicemail, the system prompt "The extension {extension\_number} you dialed cannot be connected now. Please leave your message after the tone. When done, hang up, or press the # key" will be played in the selected language.



**Note:**

If you set up a voicemail greeting, the custom greeting will be played to callers instead.

3. Click **Save**.

## Configure email notifications for new voicemails

1. Log in to Simu Connect Web Client, go to **Preferences > Voicemail**.
2. In the **New Voicemail Notification** drop-down list, set whether and how to receive notification when a new voicemail reaches your extension number.
  - **Do Not Send Email Notifications:** Disable email notification.
  - **Send Email Notifications with Attachment:** Send a notification email with the new voicemail message attached as a .wav file.
  - **Send Email Notifications without Attachment:** Send a notification email as soon as receiving a new voicemail message.
3. If you enabled email notifications, configure the following settings as needed:

Setting	Description
After Notification	Decide how to deal with voicemails after notification emails are sent out. <ul style="list-style-type: none"> <li>• <b>Mark as Read:</b> Mark the voicemail message in mailbox as read.</li> <li>• <b>Delete Voicemail:</b> Delete the voicemail messages from mailbox.</li> <li>• <b>Do Nothing:</b> Keep the voicemail message in mailbox as unread.</li> </ul>
Send to	Specify the email address for receiving notification emails. <ul style="list-style-type: none"> <li>• <b>User Email:</b> Send the notification emails to your email address.</li> <li>• <b>Custom Email:</b> Send the notification emails to a custom email address.</li> </ul> Enter the desired email address in the <b>Custom Email Address</b> field.

4. Click **Save**.

## Configure voicemail play options

Decide which messages will be played before playing a voicemail.

1. Log in to Simu Connect Web Client, go to **Preferences > Voicemail**.
2. Select the checkboxes of the messages to be played before playing a voicemail.
  - **Play Date and Time:** Enable this option to play date and time when the message is received.
    - **Time Display Format:** If **Play Date and Time** is enabled, you can specify the time format (12-hour or 24-hour) for announcing the message arrival time.
  - **Play Caller ID:** Enable this option to play caller ID information.
  - **Play Message Duration:** Enable this option to play duration of the message.
3. Click **Save**.

## Change voicemail greetings

Decide which greetings will be played to callers when they reach your mailbox.



### Tip:

You can use system greeting or your [customized greeting](#).

1. Log in to Simu Connect Web Client, go to **Preferences > Voicemail**.
2. In the **Voicemail Greeting** section, configure greeting settings according to your needs.
  - **Default Greeting:** Select a greeting from the drop-down list of **Default Greeting**.  
Default greeting is played if no greeting is specified for a presence.
  - **Presence Greetings:** Select a greeting or create a new greeting from the drop-down list of corresponding presence.  
The presence greeting is played based on extension presence.
3. Click **Save**.

## Record or Upload Voicemail Greetings

This topic describes how to record or upload voicemail greetings.

### Background information

The personalized greetings can delight the callers, and let them know why you're unavailable and how they can best contact you. It is easy to customize personal greeting in two ways:

**Note:**

You can customize up to 10 personal greetings.

- **Upload a voicemail greeting:** Prepare an audiofile, which must meet the following requirements:
  - **File format:** .wav, .mp3, or .gsm
    - PCM, 8K, 16bit, 128kbps
    - A-law(g.711), 8k, 8bit, 64kbps
    - u-law(g.711), 8k, 8bit, 64kbps
  - **File size:** Up to 8MB.
- **Record a voicemail greeting via a phone:** Place a call from system, you can answer the call and record your voice as voicemail greetings.

## Upload a voicemail greeting

1. Log in to Simu Connect Web Client, go to **Preferences > Voicemail**.
2. In the **Voicemail Greeting** section, click **Greeting Management**.
3. In the pop-up window, click **Upload**.
4. Select an audio file to upload.

You can view and manage the greeting in **Greeting Management**.

## Record a voicemail greeting via a phone

1. Log in to Simu Connect Web Client, go to **Preferences > Voicemail**.
2. In the **Voicemail Greeting** section, click **Greeting Management**.
3. In the pop-up window, click **Record New Greeting** tab.
4. In the **Audio File Name** field, enter a name to help you identify it.
5. In the **Extension** drop-down list, select your extension to record a greeting.
6. Click **Save**.

The system places a call to your extension.

7. Answer the call, and record greeting on the phone.



Press **#** key or hang up after recording greeting. You can view and manage the greeting in **Greeting Management** tab.

## Manage Personal Voicemail Greetings


This topic describes how you can manage personal greeting, including playing, downloading, and deleting greetings.

### Play a personal greeting


To check the uploaded greeting or recorded greeting, you can play the greeting on a phone or on web.

1. Log in to Simu Connect Web Client, go to **Preferences > Voicemail**.
2. In the **Voicemail Greeting** section, click **Greeting Management**.
3. Select the greeting that you want to play, click .
4. In the pop-up window, choose how to play the greeting:
  - **Play on Web**: Click  to play the greeting on the web directly.
  - **Play to Extension**: Play the greeting on your phone.
    - a. Select your extension, and click **Play**.  
The system places a call to your extension.
    - b. Pick up the call to listen to the greeting on the phone.

### Download a personal greeting

1. Log in to Simu Connect Web Client, go to **Preferences > Voicemail**.
2. In the **Voicemail Greeting** section, click **Greeting Management**.
3. Select the greeting that you want to download, click .

### Delete personal greetings

1. Log in to Simu Connect Web Client, go to **Preferences > Voicemail**.
2. In the **Voicemail Greeting** section, click **Greeting Management**.
3. To delete a greeting, do as follows:
  - a. Click  beside the greeting.
  - b. Click **OK** and **Apply**.
4. To delete greetings in bulk, do as follows:
  - a. Select the checkboxes of the desired greetings, click **Delete**.
  - b. Click **OK** and **Apply**.

# Audio and Video

## Configure Audio and Video

This topic describes how to configure audio and video.



### Important:

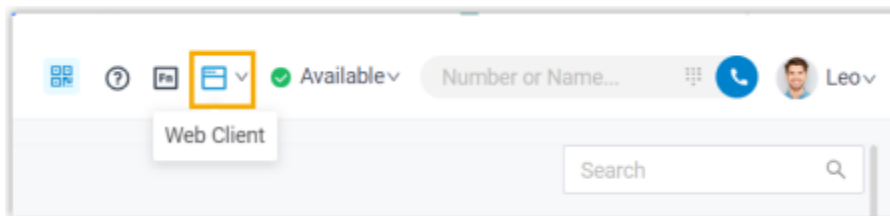
- Video settings require support from your organization's PBX server.
- You can NOT configure audio and video in either of the following scenarios:
  - Simu Connect Web Client is in CTI mode.

In this scenario, the **Audio & Video** configuration page is not displayed. ◦ Simu Connect Web Client is associated with 'Cloud One BCS Simu Connect for Google' Chrome extension.

In this scenario, the **Audio & Video** configuration page can not be edited, and the page prompts "Media settings are handled by Cloud One BCS Simu Connect for Google".

## Prerequisites

- Allow web browser to access microphone and camera in computer.
- Simu Connect Web Client is in **Web Client** mode.



## Procedure

1. Log in to Simu Connect Web Client, go to **Preferences > Audio & Video**.

A window pops up, which asks permission for Simu Connect Web Client to use microphone.

2. In the pop-up dialog box, allow Simu Connect Web Client to use microphone and camera.
  - a. Click **Allow** to allow Simu Connect Web Client to use microphone.

The microphone is turned on.

- b. Click **Allow** to allow Simu Connect Web Client to use camera.

The camera is turned on, you can see a preview video of yourself on the left side of the page.



**Note:**

If you fail to see a preview video of yourself, you need to check if the camera is in use. Refresh the page and try again when the camera is available.

3. On right side of the page, select desired device from the drop-down list of **Camera**, **Microphone**, **Speaker**, and **Ringling Device**.
4. If you have a headset compatible with Simu Connect Web Client, you can set up the headset to work with Simu Connect Web Client in the **Headset Integration** section. In this way, you can control Simu Connect calls directly from the headset.

For the compatible headsets and the integration instructions, see [Integrate HID-compliant Headsets with Simu Connect Web Client](#) and [Integrate Headsets with Simu Connect Web Client \(before v84.7.0.17\)](#).

5. Click **Save**.

## Integrate HID-compliant Headsets with Simu Connect Web Client

If you have a **HID-compliant headset** on hand and you use a specific version of **Simu Connect Web Client** and a specific **Web Browser**, you can set up the HID-compliant headset as the audio device for Simu Connect Web Client, so as to control Simu Connect calls via the headset.



### Tip:

If you set up Simu Connect Web Client to work with 'Cloud One BCS Simu Connect for Google', you can also integrate HID-compliant headsets on 'Cloud One BCS Simu Connect for Google'. For more information, see Integrate HID-compliant Headsets with Simu Connect Web Client on 'Cloud One Simu Connect for Google'.

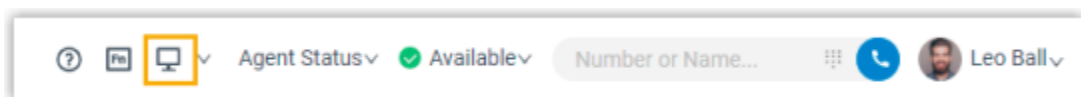
## Requirements

Only when your devices meet the following requirements can you integrate headset with Simu Connect Web Client as the instructions provided in this topic.

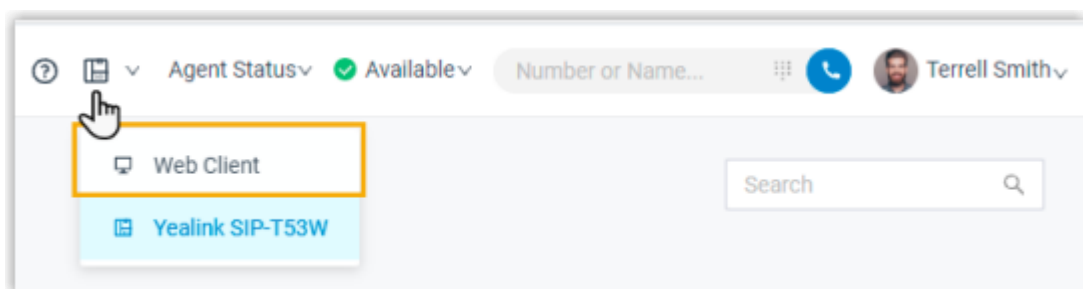
Item	Requirement
<b>Simu Connect Web Client</b>	<ul style="list-style-type: none"> <li>• 84.7.0.17 or later</li> </ul>
<b>Web Browser</b>	<ul style="list-style-type: none"> <li>• Google Chrome: Version 89 or later</li> <li>• Microsoft Edge: Version 89 or later</li> <li>• Opera: Version 75 or later</li> </ul>
<b>Headset</b>	<ul style="list-style-type: none"> <li>• All HID-compatible headsets (connected via USB or Bluetooth transmitter) are supported.</li> </ul> <div> <p><b>Note:</b> Headsets from <b>Jabra</b>, <b>Yealink</b>, <b>EPOS</b>, <b>Poly</b> have been verified to work properly. Headsets from other brands may be subject to limitations.</p> </div>

## Procedure

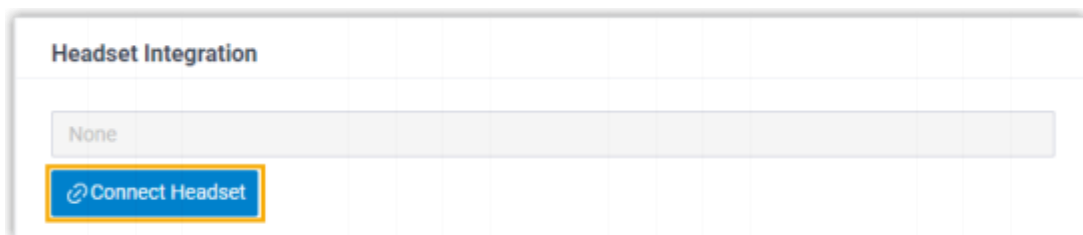
1. Make sure Simu Connect Web Client is in **Web Client** mode, or you can NOT set up the HID-compliant headset as the audio device.
  - a. Log in to Simu Connect Web Client.
  - b. At the toolbar, check if is displayed.



If not, select **Web Client** from the drop-down list.



2. Connect the HID-compliant headset to Simu Connect Web Client.
  - a. Connect the HID-compliant headset to the USB port of your computer.
  - b. Go to **Preferences > Audio & Video > Headset Integration**, click **Connect Headset**.

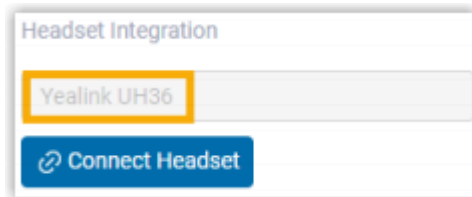


- c. In the pop-up window, select the connected HID-compliant headset, then click **Connect**.

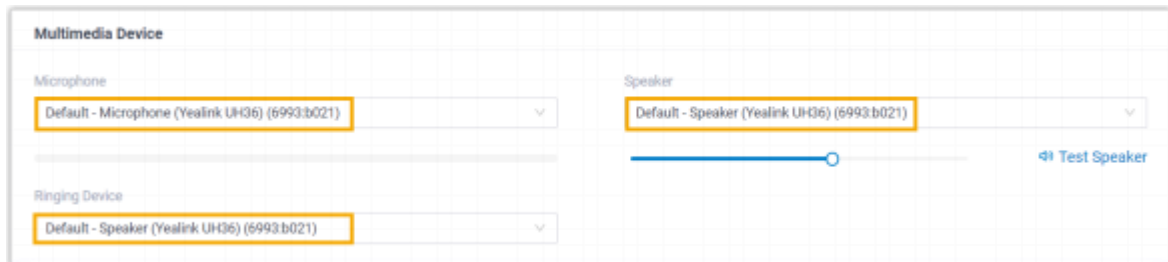


Screen shoot

The HID-compliant headset is connected and displayed.



3. In the **Multimedia Device** section, set up the HID-compliant headset as the audio de- vice for Simu Connect Web Client.



- **Microphone:** Select the HID-compliant headset.
- **Speaker:** Select the HID-compliant headset.



You can click **Test Speaker** to test volume.

- **Ringling Device:** Select the HID-compliant headset or any desired device.

4. Click **Save**.

## Result

You can use the HID-compliant headset to handle calls. The supported call operations are as follows:

- Answer/Reject a call
- Answer/Reject a second call
- End a call
- Hold/Resume a call
- Mute/Unmute a call
- Adjust system volume

## Integrate Headsets with Simu Connect Web Client (before v84.7.0.17)

If you have a specific Jabra Headset on hand and you use a specific version of **Simu Connect Web Client** and **Google Chrome** web browser, you can set up the Jabra headset as the audio de- vice for Simu Connect Web Client, so as to control Simu Connect calls via the headset.

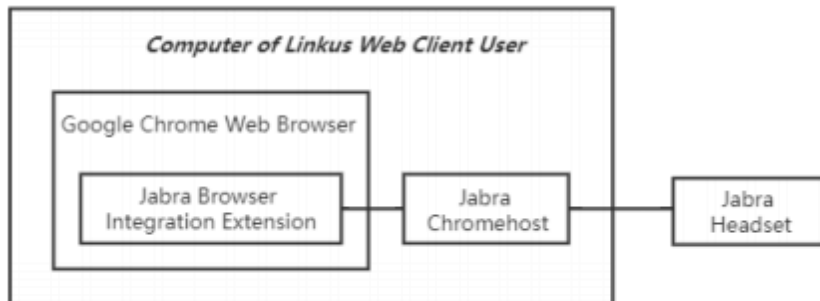
## Prerequisites

Only when your devices meet the following requirements can you integrate headset with Simu Connect Web Client as the instructions provided in this topic.

Item	Requirement
<b>Simu Connect Web Client</b>	<ul style="list-style-type: none"> <li>• v84.6.0.24</li> <li>• v84.6.0.25</li> <li>• v84.6.0.47</li> </ul>
<b>Web Browser</b>	<ul style="list-style-type: none"> <li>• Google Chrome: Version 87 or later.</li> </ul>
<b>Headset</b>	<ul style="list-style-type: none"> <li>• Jabra Evolve Series</li> <li>• Jabra Pro Series</li> <li>• Jabra Speak Series</li> <li>• Jabra Engage Series</li> <li>• Jabra Biz Series</li> </ul>

## Procedure

To integrate Jabra headset with Simu Connect Web Client, you need to install **Jabra Chromehost** and **Jabra Browser Integration Extension** to ensure advanced functionality of Jabra headset, then configure the Jabra headset as the audio device of Simu Connect Web Client.



- [Step1. Install 'Jabra Chromehost' on the computer](#)
- [Step2. Install 'Jabra Browser Integration Extension' on Google Chrome browser](#)
- [Step3. Configure Simu Connect Web Client to use Jabra Headset](#)

### Step1. Install 'Jabra Chromehost' on the computer

**Jabra Chromehost** is an application that allows access to Jabra Headset.

1. Visit [Jabra Browser Integration](#).
2. Scroll down to **Native Chromehost downloads** section.
3. In the **Chrome host native download** column, click an installation package based on your operating system.

Native Chromehost downloads		
Operating systems	Chrome host native download	Description
Windows (Windows 7 or newer)	<a href="#">JabraChromeHost2.1.0.msi</a>	Chromehost 2.1.0
macOS (El Capitan or newer)	<a href="#">JabraChromeHost2.1.1.dmg</a>	Chromehost 2.1.1

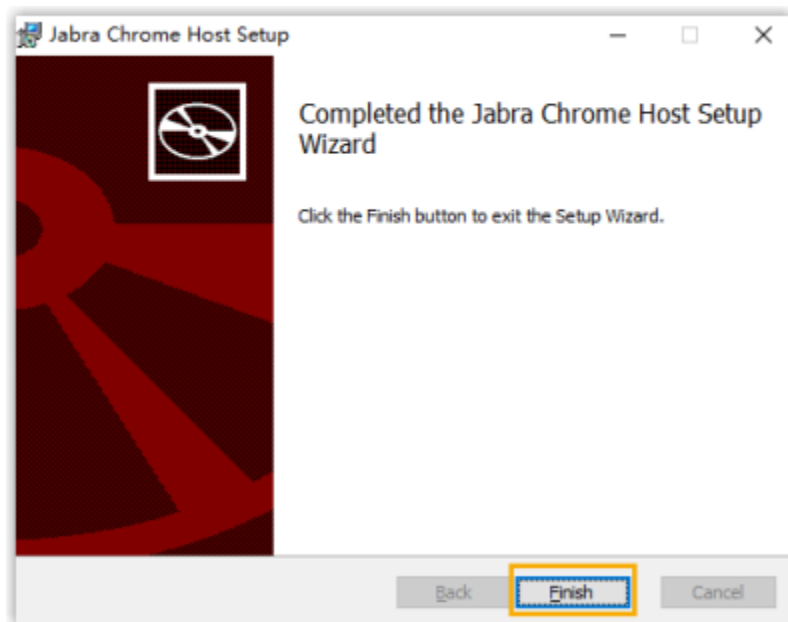
**Jabra Chromehost** is downloaded.

4. Install **Jabra Chromehost**.
  - a. Double click the installation package that you have downloaded.
  - b. Select the checkbox of acknowledgement, then click **Install**.



The **Jabra Chromehost** is installing.

c. After **Jabra Chromehost** is installed, click **Finish** to exit the Setup Wizard.

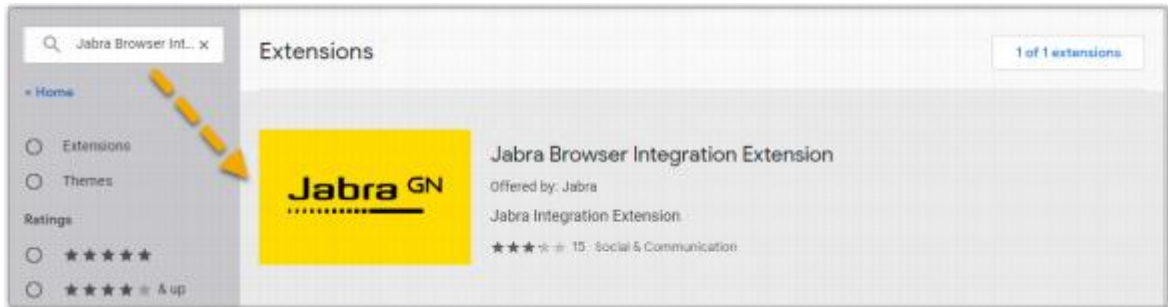


## Step2. Install 'Jabra Browser Integration Extension' on Google Chrome browser

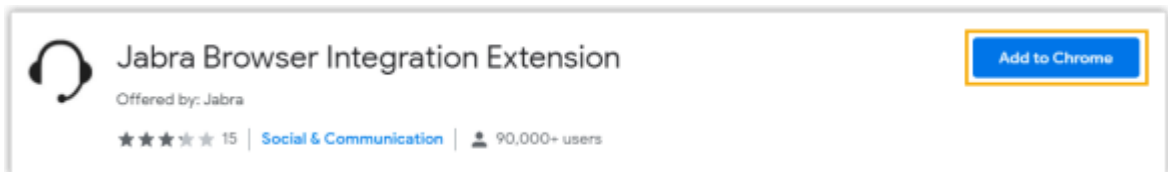
**Jabra Browser Integration Extension** is an extension for Google Chrome, which allows Chrome to communicate with the installed **Jabra Chromehost**.

Follow the instructions below to install the extension.

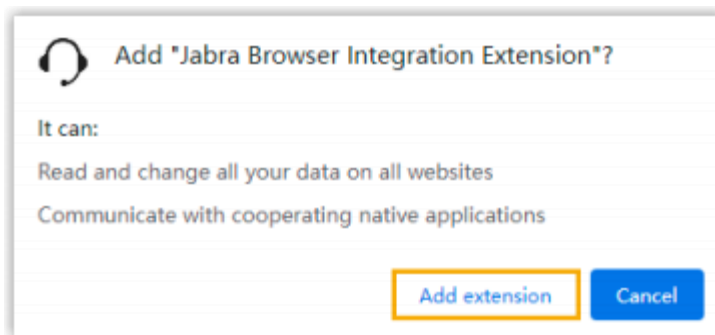
1. On your computer, open [Chrome Web Store](#).
2. In the search bar, enter `Jabra Browser Integration Extension` and press **Enter**. The **Jabra Browser Integration Extension** is displayed on the page.



3. Click **Jabra Browser Integration Extension**.
4. On the right of the extension, click **Add to Chrome**.




5. In the pop-up window, check the permissions that **Jabra Browser Integration Extension** requests, then click **Add extension**.

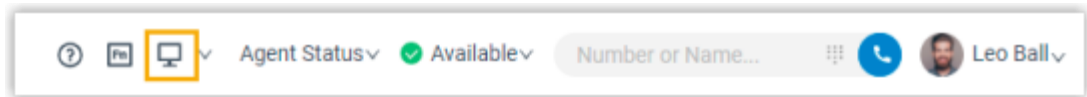


**Jabra Browser Integration Extension** is installed.

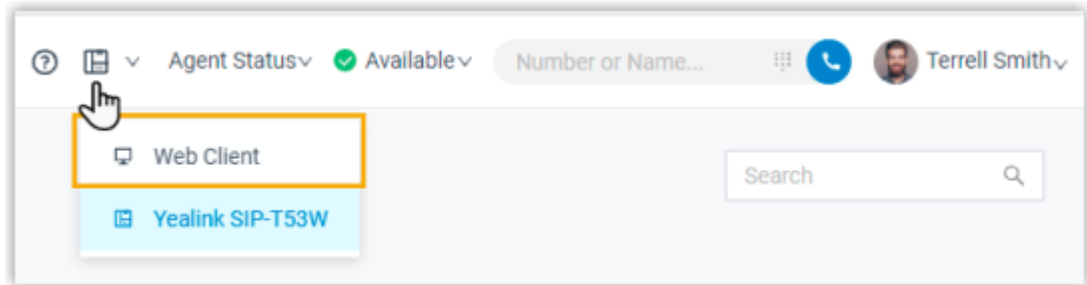
### Step3. Configure Simu Connect Web Client to use Jabra Headset

1. Make sure Simu Connect Web Client is in **Web Client** mode, or you can NOT set up the Jabra headset as the audio device.
  - a. Log in to Simu Connect Web Client.

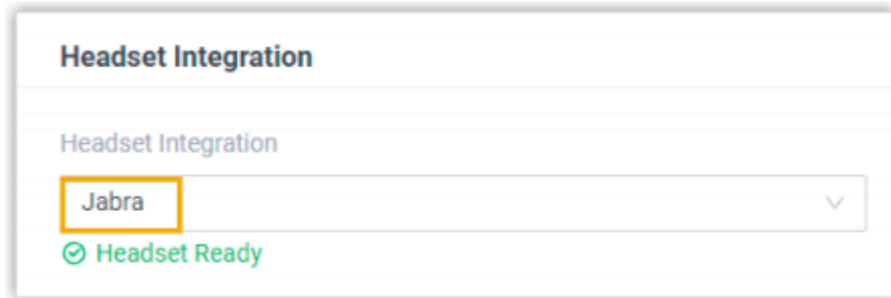
b. At the toolbar, check if  is displayed.



If not, select **Web Client** from the drop-down list.



2. Connect Jabra headset to Simu Connect Web Client.
  - a. Connect Jabra headset to the USB port of your computer.
  - b. On Simu Connect Web Client, go to **Preferences > Audio & Video**.
  - c. In the **Headset Integration** drop-down list, select **Jabra**.



If the environment of your web browser meets the requirements for headset integration, the page prompts 'Headset Ready'.

3. In the **Multimedia Device** section, set up the Jabra headset as the audio device for Simu Connect Web Client.

Microphone

Default - Microphone (Jabra EVOLVE 20 MS) (0b0e:0302)

Speaker

Default - Speaker (Jabra EVOLVE 20 MS) (0b0e:0302)

Test Speaker

Ringing Device

Default - Speaker (Jabra EVOLVE 20 MS) (0b0e:0302)

- **Microphone:** Select Jabra Headset.
- **Speaker:** Select Jabra Headset.



**Tip:**

You can click **Test Speaker** to test volume.

- **Ringing Device:** Select Jabra Headset or any desired device.

4. Click **Save**.

## Result

You can use Jabra Headset to handle calls. The following call operations are supported:

- Answer/Reject a call
- Answer/Reject a second call
- End a call
- Hold/Resume a call
- Mute/Unmute a call
- Adjust system volume



**Important:**

If you simultaneously stay logged in on both Simu Connect Web Client and Simu Connect Desktop Client, then the Jabra headset will be used to control calls of Simu Connect Desktop Client.

# Email Notification

## Set up Email Notifications for Missed Calls

Set up email notifications to receive notifications when you have missed calls.

### Prerequisites

Make sure you have [set an email address for your extension.](#)

### Procedure

1. Log in to Simu Connect Web Client, go to **Preferences > Features**.
2. In the **Notifications** section, select the checkbox of **Send email notifications on missed calls**.
3. Click **Save**.

### Result

If you have missed calls, system will send notification emails to your mailbox.

## Set up Email Notifications for User Password Change

Set up email notifications to receive notifications when your user password is changed.

### Prerequisites

Make sure you have [set an email address for your extension.](#)

### Procedure

1. Log in to Simu Connect Web Client, go to **Preferences > Features**.
2. In the **Notifications** section, select the checkbox of **Send email notification when the User Password is changed**.
3. Click **Save**.

### Result

If your user password is changed, system will send notification emails to your mailbox.



# Call

## Handle Incoming Calls Based on Caller ID

Call handling rules help you manage calls based on incoming Caller ID. This topic describes how to create a call handling rule to handle incoming calls based on incoming Caller ID.

### Procedure

1. Log in to Simu Connect Web Client, go to **Preferences > Features > Call Handling Based on Caller ID**.
2. Set up one or more rules according to your needs.



#### Note:

You can set up rules to filter and handle calls from both your colleagues and external contacts.

- a. Click **Add**.
- b. In the **Caller ID** field, enter a specific number or a number pattern.
  - To apply the rule to a specific number, enter a specific number.  
For example, enter `10086` to handle incoming calls with Caller ID 10086 based on the rule.
  - To apply the rule to a number pattern, enter a wildcard pattern.  
For example, enter `9011.` to handle incoming calls with any Caller ID starting with 9011 based on the rule.

For more information, see [Caller ID Pattern](#).
- c. In the **Action** drop-down list, set how you want to deal with incoming calls with the Caller ID.
  - **Hang Up**
  - **Extension**
  - **Voicemail**
  - **IVR**
  - **Play Greeting then Hang up**
  - **Accept Call**

**Note:**

By default, all incoming calls are allowed to reach your extension. If there is a call-handling rule to prevent spam calls (eg.728373XX) from reaching your extension, but you want to accept calls from a specific number (eg.72837300), you can create another rule to accept calls from 72837300.

- d. Click **Save**.
- e. **Optional:** To add more rules, repeat **step a-d**.
- f. **Optional:** In the **Move** column, adjust the rules' order. The rules take effect from the top down.

**Note:**

For example, set the rule "Accept calls from 72837300" to a higher priority than the rule "Reject calls from numbers starting with 728373". In this way, when receiving calls from 72837300, the system will send calls to your extension. For other incoming calls from number starting with 728373, the system will hang up directly.

- 3. Click **Save**.

## Result

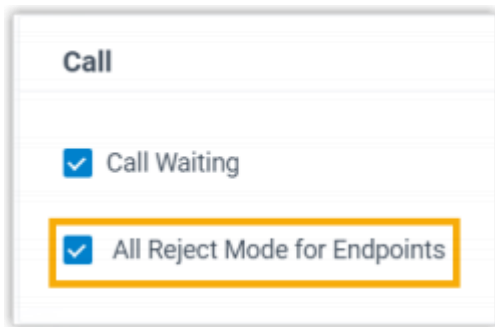
When an incoming call reaches your extension, PBX will handle the call based on Caller ID.

## Stop Rejected Calls from Ringing Other Endpoints

If your extension has been registered on multiple endpoints, when you reject an incoming call on one of the endpoints, the call keeps ringing all the other endpoints. In this case, you can set up your extension to stop rejected calls from ringing other endpoints.

## Procedure

1. Log in to Simu Connect Web Client, go to **Preferences > Features**.
2. In the **Call** section, select the checkbox of **All Reject Mode for Endpoints**.



3. Click **Save**.

## Result

When you reject an incoming call on an endpoint, the other endpoints will stop ringing. The call will be routed to the preset **When Busy** destination (Path: **Preferences > Presence > Call Forwarding**).

## Set up Auto Answer for Non-paging/intercom Calls

With this auto-answer feature, you can efficiently manage incoming non-paging/intercom calls without manually clicking to answer, significantly reducing callers' waiting time. This topic describes how to configure auto-answer non-paging/intercom calls.

## Requirements

The firmware version of PBX server is 84.17.0.16 or later.

## Procedure

1. Log in to Simu Connect Web Client, go to **Preferences > Features**.
2. In the **Call** section, select the checkbox of **Auto Answer**, then configure the following settings as needed.

- **Auto Answer Delay Time(s)**: Set the delay time in seconds that callers have to wait before automatically answering non-paging/intercom calls.

The valid value is from 0 - 60, and 0 indicates that incoming non-paging/intercom calls will be auto-answered immediately.

- **Play Auto Answer Tone**: Enable this option to alert you with a beep tone when incoming non-paging/intercom calls are answered automatically.

3. Click **Save**.

## Result

Non-paging/intercom calls will be auto-answered based on the delay time.



### Note:

- Incoming video calls will be auto-answered as audio calls.
- If you are already on an active call and call waiting is enabled, the new call will wait until the current call ends before being auto-answered; otherwise, it will be routed to the "When Busy" destination.

## Set up Auto Answer for Paging/Intercom Calls

With this auto-answer feature, paging and intercom calls will be auto-answered immediately without manually clicking to answer. This topic describes how to enable auto-answer for paging and intercom calls.

## Requirements

The firmware version of PBX server is 84.17.0.16 or later.

## Procedure

1. Log in to Simu Connect Web Client, go to **Preferences > Features**.
2. In the **Call** section, select the checkbox of **Auto Answer Paging/Intercom Call**, then configure the following settings as needed.
  - **Paging/Intercom Calls Barge In**: Enable this option to auto answer incoming paging/intercom calls when you are already on an active call.
  - **Play Auto Answer Tone**: Enable this option to alert you with a beep tone when incoming paging/intercom calls are answered automatically.
3. Click **Save**.

## Result

Paging/intercom calls will be auto-answered.



### Note:

If you are already on an active call but call waiting is disabled, the new Paging/intercom call will be routed to the "When Busy" destination.

# Call Popup

## Automatically Open Contact URL on Incoming Calls

Cloud One BCS provides a lightweight integration with a third-party application (such as CRM system, ERP system, etc.) to achieve call popup via custom popup URL. When your extension receives a call, a browser webpage will pop up automatically to display contact details.

### Requirements

- **PBX server:** Version 84.18.0.59 or later
- **Third-party application:**
  - Web-based.
  - Support to provide a URL that can identify callers via Caller ID and Caller ID Name.

### Procedure

1. Log in to Simu Connect Web Client, go to **Preferences > Features > Call Popup**.
2. Select the checkbox of **Open Contact URL Using Custom Popup URL**.
3. Set up third-party integration via Popup URL.

**Table 16.**

Settings	Descriptions
Popup URL	<p>Enter the third-party URL, followed by the variables that you want to pass.</p> <p><b>Supported variables:</b></p> <ul style="list-style-type: none"> <li>• <code>{{ .CallerNumber }}</code>: Incoming Caller ID.</li> <li>• <code>{{ .CallerDisplayName }}</code>: Incoming Caller ID Name. Take Solve360 CRM as an example: https://web/solve.360.com/{{.CallerNumber}}&amp;{{.CallerDisplayName}}</li> </ul>
Communication Type	<p>Select which types of calls will trigger the call pops.</p> <ul style="list-style-type: none"> <li>• <b>Inbound:</b> Inbound calls from external users.</li> <li>• <b>Internal:</b> Internal calls from colleagues.</li> </ul>
Trigger Event	<p>Set when the call popup will be automatically triggered.</p> <ul style="list-style-type: none"> <li>• <b>Ringin</b><b>g:</b> An incoming call reaches.</li> <li>• <b>Answered:</b> An incoming call is answered.</li> <li>• <b>Call End:</b> An incoming call is ended.</li> </ul>

4. Click **Save**.

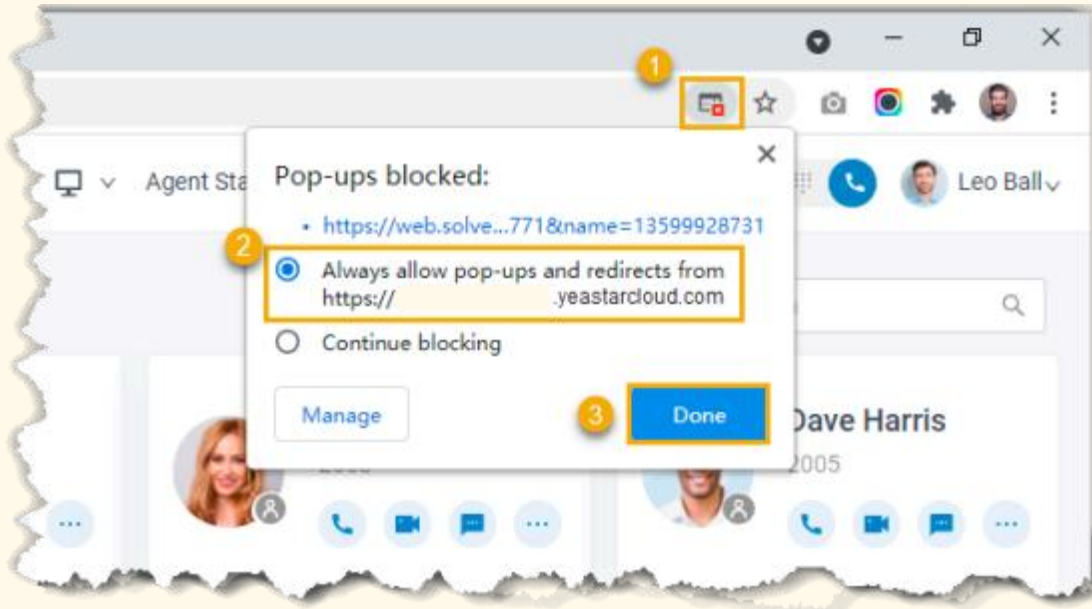
## Result

When your extension receives a call, a browser webpage automatically pops up based on the specified call-related events, displaying relevant customer information.



### Important:

For the first-time use, you need to allow pop-ups and redirection in the web browser, or the pop-up screen can NOT be opened automatically.



## Function Keys

### Configure Function Keys

Function keys allow you to monitor status of specific objects or quickly perform specific operations. This topic describes how to configure function keys on Simu Connect Web Client.

### Applications and limitations

Refer to the following table for the endpoints where function keys can be applied and the supported number of function keys for each endpoint.

Supported Endpoint	Max. Number of Function Keys
<b>Simu Connect Desktop Client</b>	120
<b>Simu Connect Web Client</b>	
<b>Cloud One BCS Simu Connect for Google</b>	
<b>IP phones</b> that support Auto Provisioning.	Depend on how many line keys your phone supports.

## Procedure

1. Log in to Simu Connect Web Client, go to **Preferences > Function Keys**.

The function keys configured by system administrator for your extension are displayed in the list, if any.

2. Configure function keys according to your needs.

Function Key	Type	Value	Label	Operations	Sort
Key 1	Speed Dial	2008-Jaime Hart	Jaime Hart		
Key 2	Check Voicemail	2000-Leo Ball	VM-Leo Ball		
Key 3	Agent Login/Logout	6400	Login/Logout		
Key 4	Agent Pause/Unpause	6400	Pause/Unpause		

+ Add

- **Type:** Select a key type.



### Tip:

For the supported key types, see [the table](#).


- **Value:** Configure a desired value based on the key type, such as parking number, queue, or extension.
- **Label:** Optional. Enter a value to help you identify the function key.

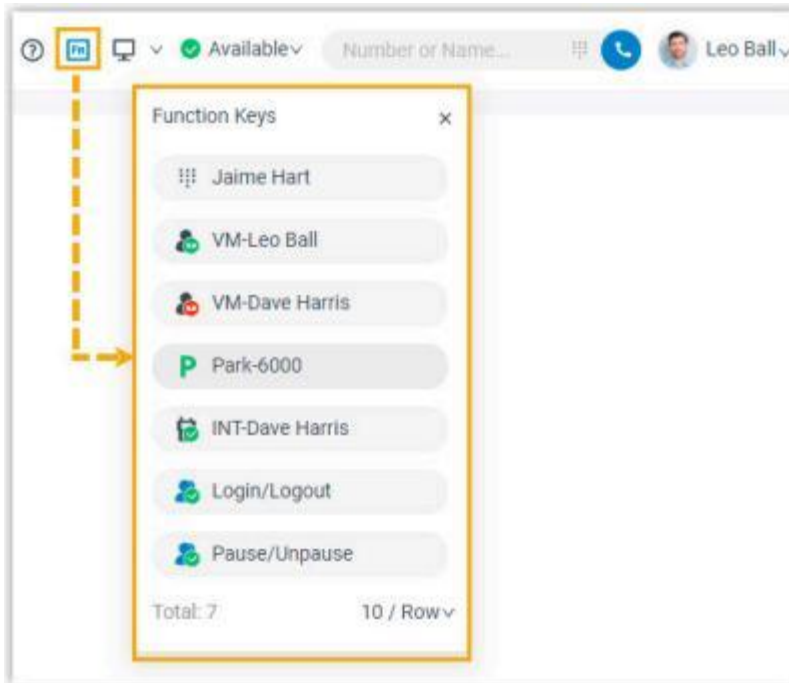
3. Click **Save**.

## Result

- The function keys are applied to **Simu Connect Desktop Client**, **Simu Connect Web Client**, and **Cloud One Simu Connect for Google**.



You can click  at the top toolbar to bring up a mini panel, on which you can monitor status of specific objects or quickly perform specific operations via function keys.



- If you have registered your extension on an IP phone via Auto Provisioning, the phone also automatically applies the changes.














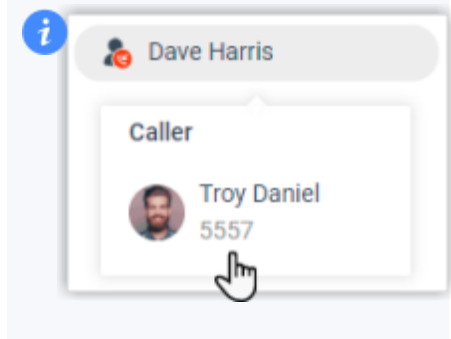







#### Note:

For IP phones, the number of programmable function keys depends on how many line keys your phone supports. If the number of function keys you assign exceeds the number of programmable keys supported by your phone, the redundant keys cannot take effect.








## Types of function keys

Key Type	Function	Icon & Description
N/A	No functionality.	<ul style="list-style-type: none"> <li>• : The function key provides no functionality until configuration.</li> </ul>
Line	Configure line keys for IP phone.	<ul style="list-style-type: none"> <li>• : The key type <b>Line</b> is only available for IP phones.</li> </ul>
BLF	Monitor the status of a specific extension.	<ul style="list-style-type: none"> <li>• : The monitored extension is unregistered.</li> <li>• : The monitored extension is online and ready for communication.</li> <li>• : The monitored extension is away from desk.</li> <li>• : The monitored extension doesn't want to be disturbed, and won't receive any calls.</li> <li>• : The monitored extension is currently on lunch break.</li> <li>• : The monitored extension is on a business trip.</li> <li>• : The monitored extension is currently off work.</li> <li>• : The monitored extension receives a call.</li> </ul> <div>  <b>Tip:</b>            To pick up the incoming call to the extension on Simu Connect Web Client or Simu Connect extension, hover your mouse over the function key, then click the desired incoming call.         </div>

Key Type	Function	Icon & Description
		 <ul style="list-style-type: none"> <li> : The monitored extension is in a call.</li> <li> : The monitored extension is held in a call.</li> </ul> <p><b>Note:</b> The function key doesn't work in an audio conference call.</p>
Speed Dial	Speed dial a number.	<ul style="list-style-type: none"> <li> : Click the icon to place a call to the most commonly dialed numbers or extensions.</li> </ul>
Check Voicemail	<ul style="list-style-type: none"> <li>Monitor the status of voicemail.</li> <li>Check voicemail messages.</li> </ul>	<ul style="list-style-type: none"> <li> : The monitored extension is deleted.</li> <li> : All the voicemails of the monitored extension are read.</li> <li> : There are unread voicemails for the monitored extension.</li> </ul> <p><b>Tip:</b> To check the voicemail messages on Simu Connect Web Client or Simu Connect extension, click the icon, then enter the voicemail PIN code as prompts.</p>
Check Group Voicemail	<ul style="list-style-type: none"> <li>Monitor the status of group voicemail in shared mode.</li> </ul>	<ul style="list-style-type: none"> <li> : The monitored group voicemail is deleted.</li> </ul>

Key Type	Function	Icon & Description
	<ul style="list-style-type: none"> <li>Check group voicemail messages.</li> </ul>	<ul style="list-style-type: none"> <li>: All the voicemails of the monitored group voicemail are read.</li> <li>: There are unread voicemails for the monitored group voicemail.</li> </ul> <div> <b>Tip:</b> To check the voicemail messages on Simu Connect Web Client or Simu Connect extension, click the icon, then enter the group voicemail PIN code as prompts.         </div>
Park & Retrieve	<ul style="list-style-type: none"> <li>Monitor the status of a specific parking number.</li> <li>Park a call on a specific parking number.</li> <li>Retrieve a parked call from a specific parking number.</li> </ul>	<ul style="list-style-type: none"> <li>: The parking number is invalid.</li> <li>: The parking number is available.</li> </ul> <div> <b>Tip:</b> You can click the icon to park the current call on the parking number.         </div> <ul style="list-style-type: none"> <li>: The parking number is occupied.</li> </ul> <div> <b>Tip:</b> You can click the icon to retrieve the call.         </div> <div> <b>Note:</b> The function key doesn't work in an audio conference call.         </div>
Intercom	<ul style="list-style-type: none"> <li>Monitor the status of a specific extension.</li> <li>Place an intercom call to the monitored extension to make an announcement.</li> </ul>	<ul style="list-style-type: none"> <li>: The monitored extension is unregistered.</li> <li>: The monitored extension is available.</li> <li>: The monitored extension receives a call.</li> </ul>

Key Type	Function	Icon & Description
		<ul style="list-style-type: none"> <li>: The monitored extension is in a call.</li> </ul>
DTMF	Send DTMF signals directly instead of manually entering the numbers each time.	<ul style="list-style-type: none"> <li>: During a call, click the icon to send DTMF signals.</li> </ul> <div>  <b>Note:</b>  The function key doesn't work in an audio conference call. </div>
Agent Login/Logout	<ul style="list-style-type: none"> <li>Monitor login status in a specific queue.</li> <li>Log in to or log out of a specific queue.</li> </ul>	<ul style="list-style-type: none"> <li>: Not a member in a specific queue.</li> <li>: Log in to a specific queue.</li> <li>: Log out of a specific queue.</li> </ul>
Agent Pause/Unpause	<ul style="list-style-type: none"> <li>Monitor service status in a specific queue.</li> <li>Pause or unpause receiving a call from a specific queue.</li> </ul>	<ul style="list-style-type: none"> <li>: Resume service in a queue.</li> <li>: Pause service in a queue.</li> <li>: Not a member in a specific queue.</li> <li>: Not logged in to a specific queue.</li> </ul>
LDAP Directory	Quickly access the LDAP phonebook to query contact information on IP phones.	<ul style="list-style-type: none"> <li>: The key type <b>LDAP Directory</b> is only available for IP phones.</li> </ul>
Boss-Secretary Feature	Monitor the call status of your boss or secretary.	<ul style="list-style-type: none"> <li>As a boss, you can monitor your secretary's call status: <ul style="list-style-type: none"> <li>: The secretary is NOT handling any calls for you.</li> <li>: The secretary is answering calls for you.</li> <li>: The secretary is putting a call on hold, waiting for you to answer.</li> </ul> </li> <li>As a secretary, you can monitor your boss's call status: <ul style="list-style-type: none"> <li>: The boss is NOT holding any calls for you to resume.</li> </ul> </li> </ul>

Key Type	Function	Icon & Description
		 : The boss is putting a call on hold, waiting for you to resume.
Call Forward	Quickly enable or disable call forwarding for the IP phone.	<ul style="list-style-type: none"> <li>  : The key type <b>Call Forward</b> is only available for IP phones. </li> </ul>
Action URL	Quickly send an HTTP GET request to a specified URL for reporting specific events.	<ul style="list-style-type: none"> <li>  : The key type <b>Action URL</b> is only available for IP phones. </li> </ul>