# Simu Connect Desktop Client Userguide

# Contents

# Simu Connect Desktop Client Overview

Running on Windows and macOS, Simu Connect Desktop Client provides you with access to enterprise-grade telephony features from your computer desktop.

## Simu Connect Desktop Client layout

Screen shoot

1. [Navigation bar](#)
2. [Toolbar](#)
3. [Workspace](#)

## Navigation bar

Navigation bar provides quick access to the following features:

| Feature | Description |
|---------|-------------|
| **Extensions** | • View colleague information.<br>• Place audio or video calls to colleagues.<br>• Leave voicemails for colleagues. |

| Feature | Description |
|---|---|
| | • Add colleague extensions to Favorites list. |
| **Contacts** | • View, add, and manage personal contacts.<br>• View, add, and manage company contacts. |
| **Video Conferencing** | Initiate face-to-face meetings for instant communication among team members and customers.<br>For more information, see Video Conferencing User Guide.<br><br>**Note:**<br>Simu Connect Desktop Client only provides a menu entry for the feature. When you access the feature, you will be redirected to the feature on Simu Connect Web Client without entering any credentials. |
| **Operator Panel** | Manage calls of members in a specific group.<br>For more information, see Operator Panel User Guide.<br><br>**Note:**<br>Simu Connect Desktop Client only provides a menu entry for the feature. When you access the feature, you will be redirected to the feature on Simu Connect Web Client without entering any credentials. |
| **Call Center Console** | Handle queue calls and achieve real-time call monitoring, management, and reporting.<br>For more information, see Call Center Console User Guide.<br><br>**Note:**<br>Simu Connect Desktop Client only provides a menu entry for the feature. When you access the feature, you will be redirected to the feature on Simu Connect Web Client without entering any credentials. |
| **Call Logs** | Check and manage your call logs. |
| **Voicemails** | Check and manage your voicemails. |
| **Recordings** | Check and manage your call recording files. |
| **Preferences** | Configure the following settings:<br><br>• Extension profile<br>• Extension presence<br>• Voicemail<br>• Audio and video<br>• Function keys<br>• Call-handling rules<br>• Email notifications |

| Feature | Description |
|---|---|
| | • Outlook integration |

## Toolbar

Toolbar provides quick access to common actions:

| Feature | Description |
|---|---|
| ▦ | Quick access to download Simu Connect Mobile Client and Cloud One Simu Connect for Google. |
| Fn | Use function keys to monitor status of specific objects or quickly perform specific operations via function keys. |
| 🖥 | Switch between Desktop Client mode and CTI mode. |
| Agent Status | Change your status in a queue. |
| ✅ | Change extension presence. |
| ⚏📞 | Place audio calls or video calls. |
| Account | • Change password<br>• Configure two-factor authentication (2FA)<br>• Check Privacy Policy Agreement<br>• Access Simu Connect Help Center<br>• Access Support Portal<br>• Log out of your app name |

## Workspace

An area where you can view or manage specific features.

# Getting Started

## Log in to your app name

### Simu Connect Login Overview

Simu Connect allows you to log in to Desktop Client using different methods, including logging in with your extension account via a login link, one-click login from Simu Connect Web Client, entering login information, or directly logging in with a third-party account.

**Extension account login**

You can log in to Simu Connect with your extension account using login link, one-click login, or manually-entered login information.

Quick login

- After you receive a Simu Connect welcome email, you can obtain a login link from the email, via which you can quickly log in to Simu Connect Desktop Client.

  For more information, see [Log in to Simu Connect with Extension Account Using Login Link](#).

- You can quickly log in to your Desktop Client from Simu Connect Web Client by just one click.

  For more information, see [Log in to Simu Connect with Extension Account by One Click](#).

Manual login

You need to contact system administrator to obtain your username and password, as well as the Simu Connect Server network information, then enter the information on Simu Connect Desktop Client to log in.

For more information, see [Log in to Simu Connect with Extension Account Using Manually-Entered Credentials](#).

## Third-party account login

If system administrator has integrated the server with a third-party system, you can directly log in to Simu Connect Desktop Client with the third-party account.

For more information, see the following topics:

- [Log in to Simu Connect with Microsoft Account](#)
- [Log in to Simu Connect with Active Directory Domain Account](#)
- [Log in to Simu Connect with Google Account](#)

# Log in to Simu Connect with Extension Account Using Login Link

After you receive a Simu Connect welcome email, you can use the login link to quickly log in to Simu Connect Desktop Client with your extension account.

## Prerequisites

You have received the Simu Connect welcome email.

> **Note:**
>
> - If you don't receive the Simu Connect welcome email, contact system administrator.
> - The login link is valid in 24 hours and can only be used once.

## Procedure

1. In the Simu Connect welcome mail, copy the login link.

2. Open Simu Connect Desktop Client, and click 🔗 at the top-right corner.
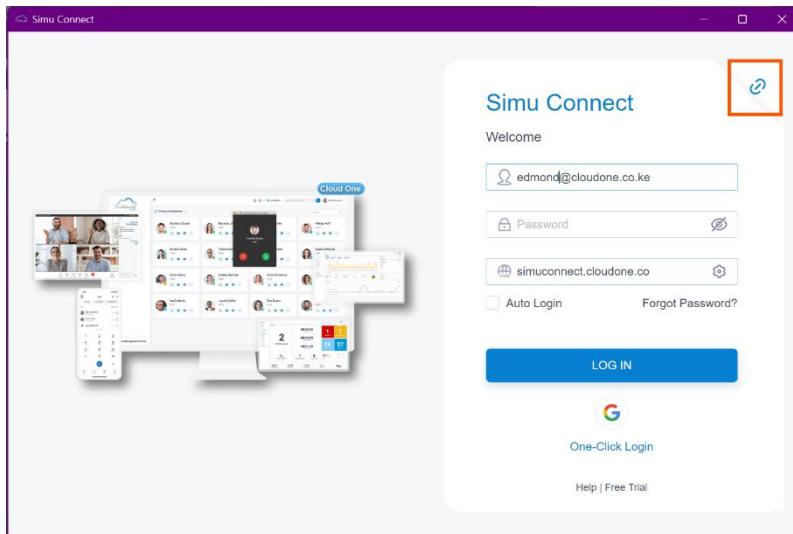
3. Paste the link on your app name, then click **LOG IN**.
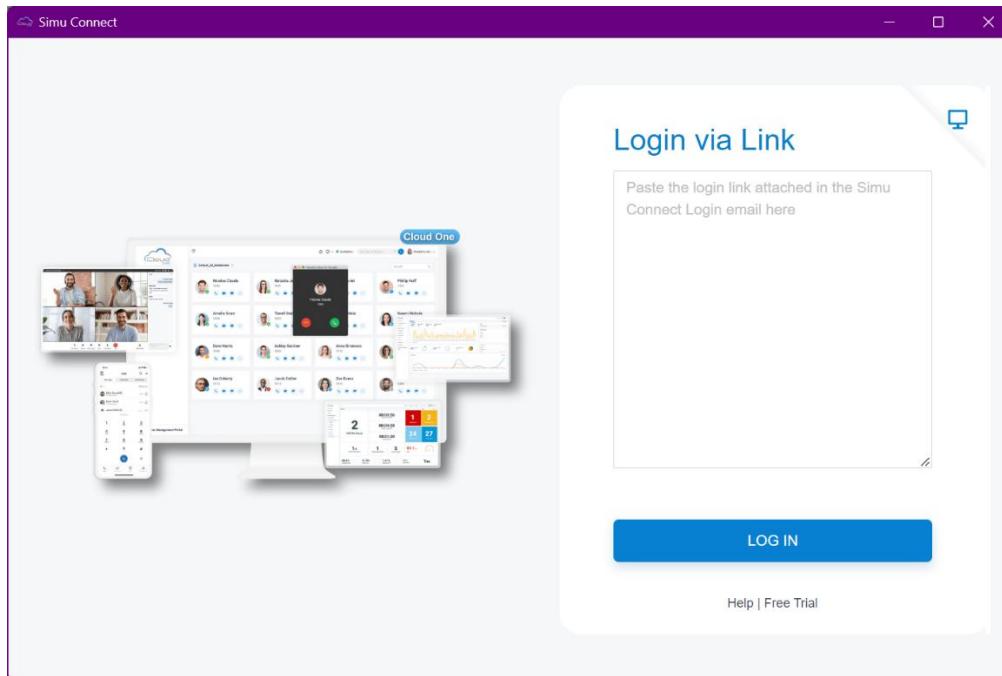


Simu Connect detects the account information and asks if you want to log in with the account.

4. In the pop-up window, click **Confirm**.
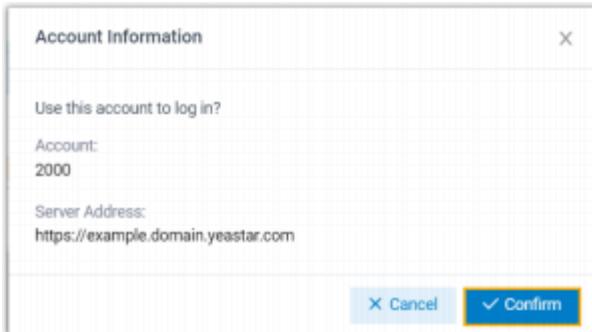
> ✏️ **Note:**
> If it is the first time that you log in to Simu Connect with extension account, you will be asked to agree a privacy policy agreement and change the initial password. When finished, you need to log in to Simu Connect with the new password.

# Log in to Simu Connect with Extension Account by One Click

Cloud One supports one-click login for Simu Connect Desktop Client, you can conveniently access your Simu Connect Desktop Client from Web Client with just one click.

## Prerequisites

You have installed [Simu Connect Desktop Client](#) on your computer.

## Procedure

1. On Simu Connect Web Client, click 📱 on the top bar, then click 🔲

<span style="color:red">Screen shoot</span>

A window pops up, asking if you allow the system to open the application.

2. On the pop-up window, do as follows:

<span style="color:red">Screen shoot</span>

a. If you want the system to open Simu Connect Desktop Client without asking again, select the checkbox.

b. Click to open the Simu Connect Desktop Client.

You are logged into Simu Connect Desktop Client without entering any credentials.

# Log in to Simu Connect with Extension Account Using Manually-Entered Credentials

This topic describes how to log in to Simu Connect Desktop Client with your extension account by manually entering login information.

## Prerequisites

Contact system administrator to obtain your username and password, as well as the domain name of the server.

## Procedure
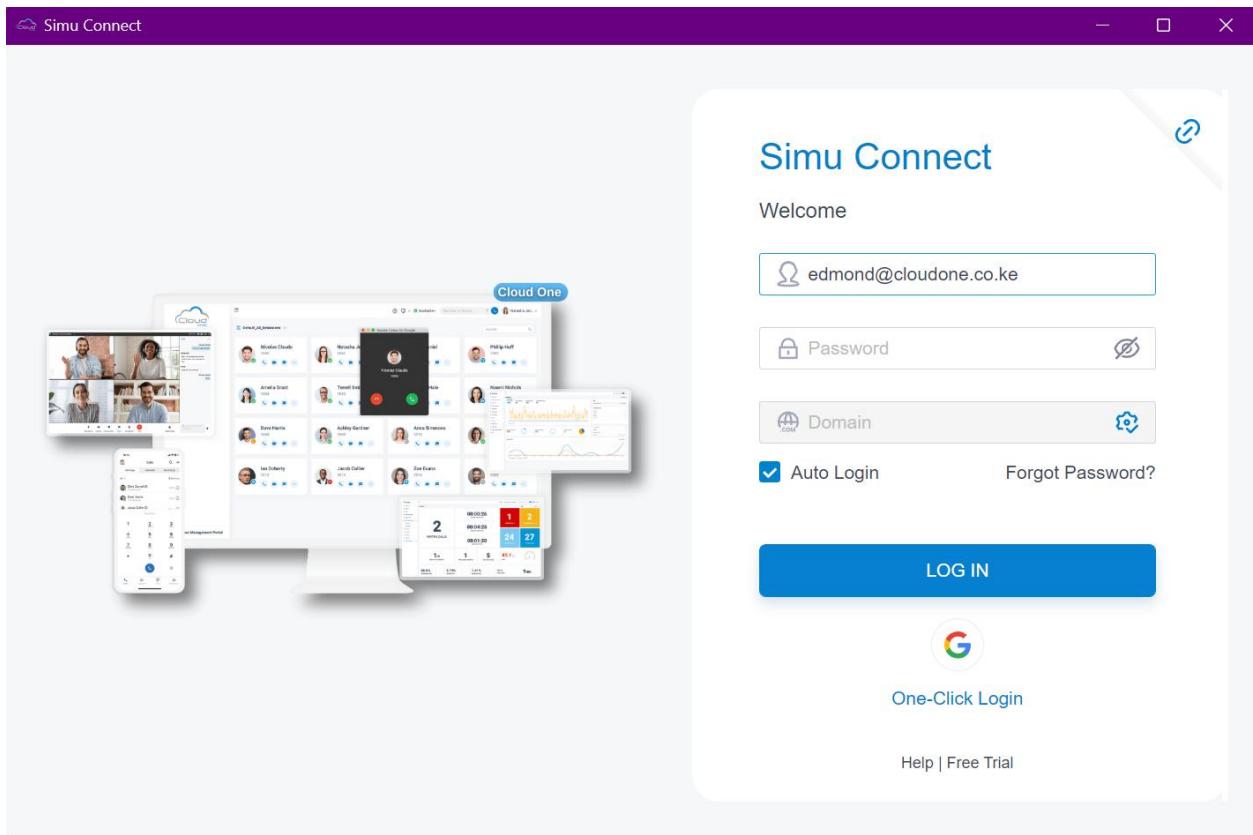


    a. In the **Username** field, enter your email address.

    b. In the **Password** field, enter the password associated with the username.

    c. In the **Domain** field, enter the domain name.

2. **Optional:** Select or unselect the **Auto Login** option to decide whether to automatically log in to this account next time you open Simu Connect Desktop Client.

3. Click **LOG IN**.

4. If you have set up two-factor authentication, you need to enter an authentication code.

a. Enter the authentication code provided by an authenticator application or email.

b. **Optional:** Select the checkbox of **Trusted   Device**.

> **Note:**
> For the device from which you log in most frequently, you can select the option to add it as a trusted device. In this way, you don't have to re-enter an authentication code with this device for the next 180 days.

c. Click **LOG IN**.

> **Note:**
> If it is the first time that you log in to Simu Connect with extension account, you will be asked to agree a privacy policy agreement and change the initial password. When finished, you need to log in to Simu Connect with the new password.

## Log in to Simu Connect with Microsoft Account

If system administrator integrates the server with Microsoft Entra ID (Azure Active Directory), you can log in to Simu Connect with your Microsoft account directly.

**Requirements**

- System administrator has integrated the server with **Microsoft Entra ID**, and enabled **Single Sign-on (SSO)** feature.
- Your Simu Connect version meets the following requirement:
    ◦ **Simu Connect Windows Desktop**: Version 1.4.9 or later
    ◦ **Simu Connect Mac Desktop**: Version 1.4.9 or later

**Procedure**

1. On Simu Connect login page, click  .

   You are redirected to the Microsoft sign-in page.
2. Sign in to your Microsoft account.

   After signed-in, you are automatically logged in to Simu Connect Desktop Client.

# Log in to Simu Connect with Active Directory Domain Account

If system administrator integrates the server with Active Directory (AD), you can log in to Simu Connect with your AD domain account directly.

## Requirements

- System administrator has integrated the server with **Active Directory**, and enabled **Single Sign-on (SSO)** feature.
- Your Simu Connect version meets the following requirement:
  - **Simu Connect Windows Desktop**: Version 1.4.9 or later
  - **Simu Connect Mac Desktop**: Version 1.4.9 or later

## Prerequisites

Contact system administrator to obtain the network information of Simu Connect Server.

**Note:**
The network information might be a domain name, or IP addresses and ports, depending on the Simu Connect Server's network configuration.

## Procedure

1. On Simu Connect login page, enter the following information.

| Scenario | Procedure |
|---|---|
| Figure 1. **Log in using domain name** | If you obtain a domain name, do as follows:<br><br>a. In the **Username** field, enter the username of your AD domain account (**Format**: username@domainname).<br>b. In the **Password** field, enter the password associated with the username.<br>c. In the **SN/Domain** field, enter the domain name.<br><br>**Note:**<br>If the **SN/Domain** field is non-editable, click ⚙ and unselect **Enable Custom Settings**, then click **Confirm**. |
| Figure 2. **Log in using IP addresses and ports** | If you obtain IP addresses and ports, do as follows:<br><br>a. In the **Username** field, enter the username of your AD domain account (**Format**: username@domainname).<br><br>b. In the `Password` field enter the password associated with the username.<br><br>c. Click ⚙ .<br>d. Select the checkbox of **Enable Custom Settings**. e. Enter the IP addresses and ports.<br><br>**Note:**<br>When you use Simu Connect Desktop Client within company's Local Area Network (LAN), Simu Connect communicates through the local hostname/IP. Otherwise, Simu Connect communicates through the external hostname/IP.<br><br>f. Click **Confirm**. |

2. Click **Login**.

# Log in to Simu Connect with Google Account

If system administrator integrates the server with Google Workspace, you can log in to Simu Connect with your Google account directly.

## Requirements

- System administrator has integrated the server with **Google Workspace**, and enabled **Single Sign-on (SSO)** feature.
- Your Simu Connect version meets the following requirement:
  ◦ **Simu Connect Windows Desktop**: Version 1.12.4 or later
  ◦ **Simu Connect Mac Desktop**: Version 1.12.4 or later

## Procedure

1. Open Simu Connect Desktop Client.
2. In the **Domain** field, enter the server address allowed for Google SSO.

   Screen shoot

3. Click G and sign in to your Google account.
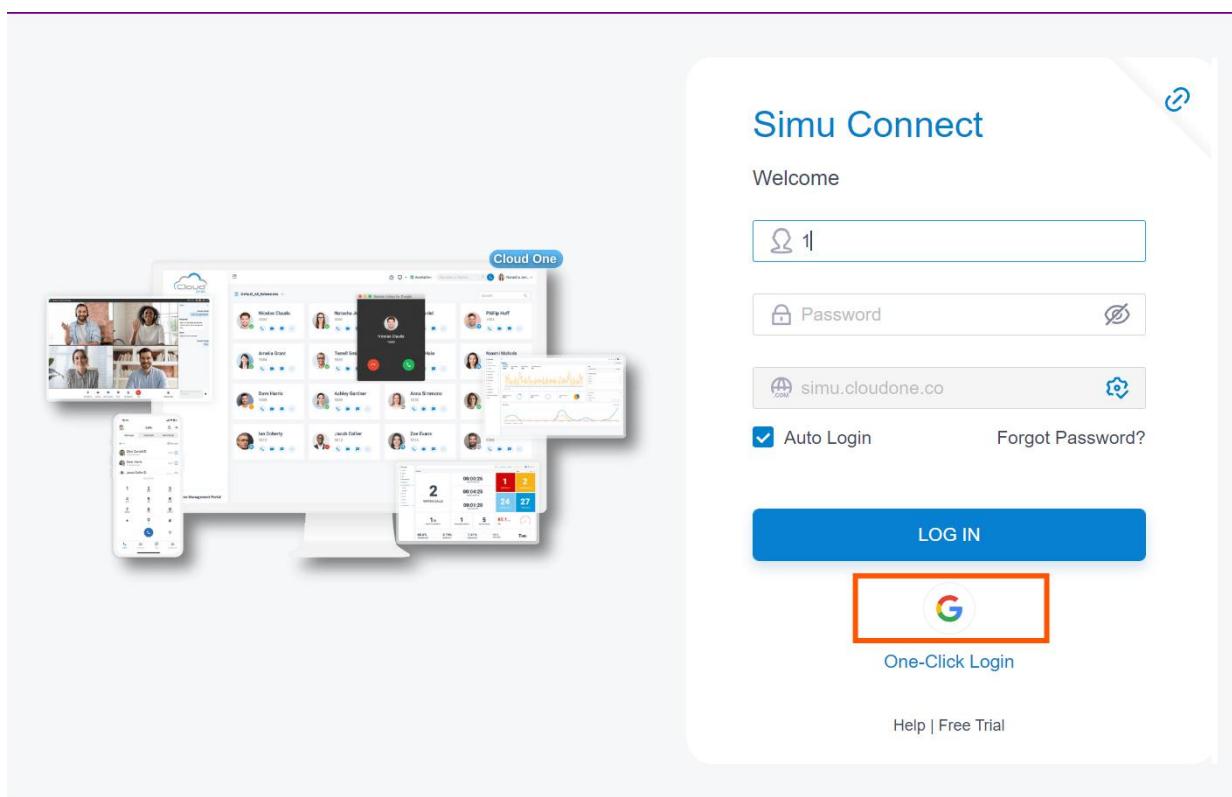
After signing in, you are automatically logged in to Simu Connect Desktop Client.

# Reset Simu Connect Password

If you forget Simu Connect login password, you can reset password on Simu Connect Desktop Client.

**Procedure**

1. On Simu Connect Desktop Client login page, click **Forget Password?**.
2. In the **Forgot Password** page, do as follows:
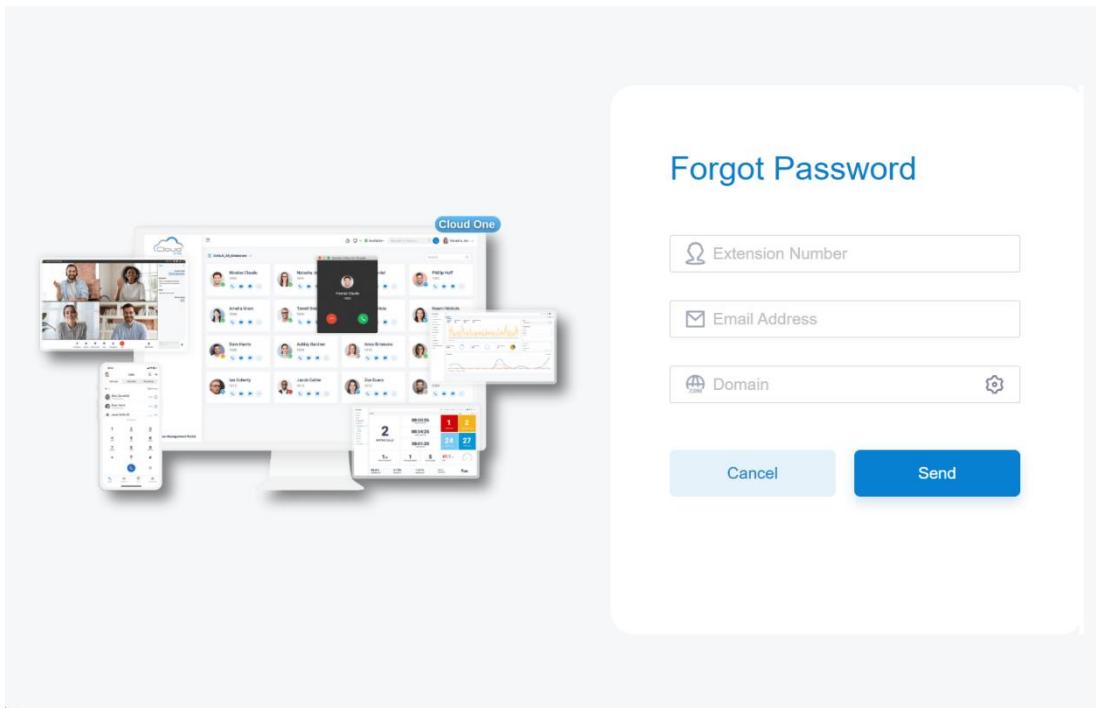
    a. In the **Extension Number** field, enter your extension number.

    b. In the **Email Address** field, enter the email address that is bound with your extension.

    c. In the **Domain** field, enter the domain name of the server.

    d. Click **Send**.

       A password reset email is sent to your mailbox.

3. In the password reset email, click the password reset link.

> **Note:**
> The link is valid for 30 minutes and can only be used once.

You are redirected to a **Reset Password** web page.

4. On the **Reset Password** web page, enter your new password twice, and click **Save**.
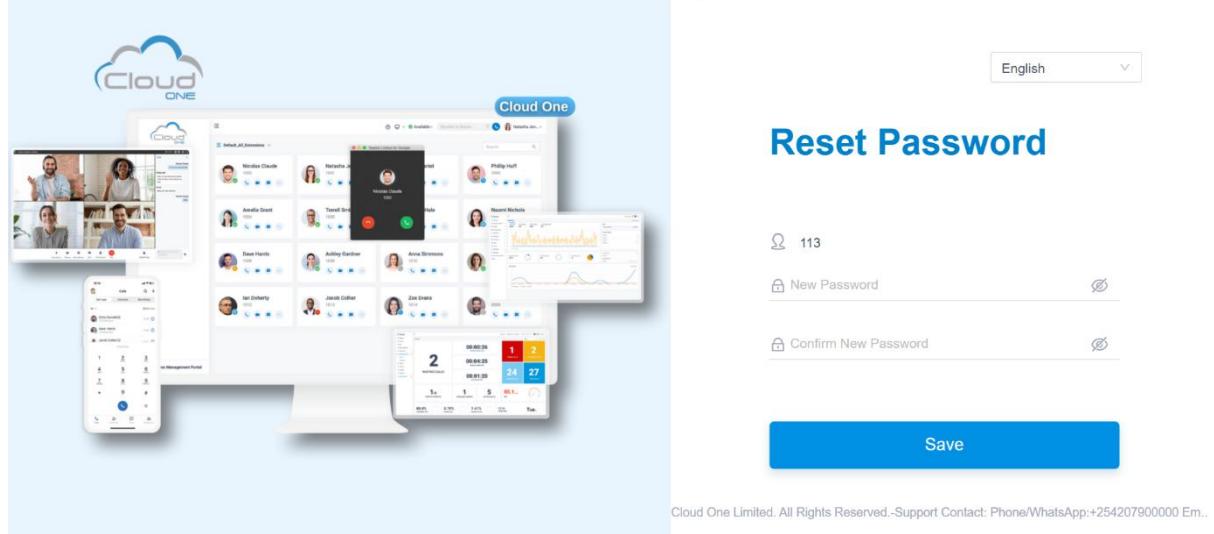
The login password is changed.

## What to do next

Log in to Simu Connect with the new password.

# Change the Display Language

You can change the display language of Simu Connect Desktop Client as needed.

## Procedure

1. Access the menu of Simu Connect Desktop Client based on your operating system.

      • **For Windows**: At the system tray, right click  .

       Screen shoot

      • **For macOS**: On the App menu, click **Simu Connect Desktop Client**.

       Screen shoot

2. Select **Settings** from the menu.
   A **Settings** window pops up.
3. In the **Language** drop-down list, select the desired language.

4. In the pop-up window, click **Reboot Now**.

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

You can configure Simu Connect Desktop Client to automatically launch when your computer starts up.

## Procedure

1. Access the menu of Simu Connect Desktop Client based on your operating system.

   - **For Windows**: At the system tray, right click  .

     Screen shoot

   - **For macOS**: On the App menu, click **Simu Connect Desktop Client**.

     Screen shoot

2. Select **Settings** from the menu.
   A **Settings** window pops up.
3. In the **System** section, select the checkbox of **Auto Startup**.
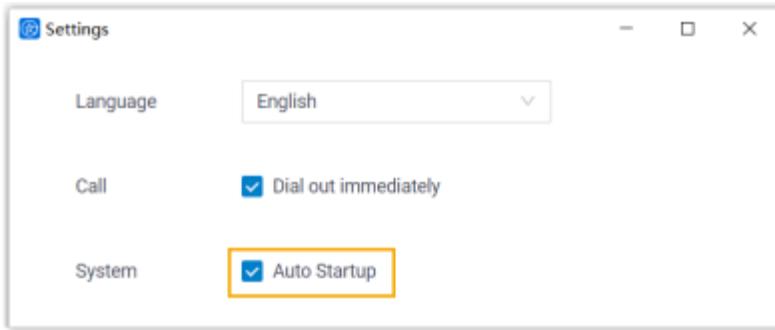
### Result

Simu Connect Desktop Client will automatically launch and run when your computer boots up.

> **Note:**
> If you have enabled **Auto Login**, your account will be automatically logged in when Simu Connect Desktop Client is launched.

# Log out of your app name

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

### Procedure

1. At the top-right corner of Simu Connect Desktop Client, click your account.
2. In the drop-down list, click **Log out**.
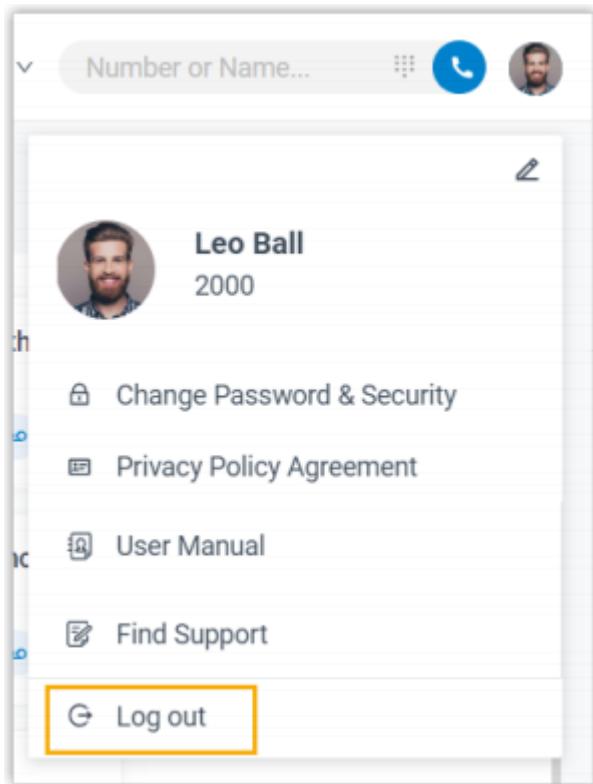
# Two-Factor Authentication (2FA)

## Two-factor Authentication (2FA) Overview

Simu Connect Desktop 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 Us- ing Authenticator Application.

### Two-factor authentication by Email

This method allows you to receive authentication codes for two-factor authentication via the email that 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 are 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 Desktop 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 Desktop Client.<br>a. On your mobile phone, open the authenticator application, and select to scan QR code.<br>b. Scan the QR code shown on Simu Connect Desktop Client. |

| Method | Instruction |
|---|---|
| | 3.Scan the QR code to get a 6-digit authentication code. <br><br> Can't scan? <br><br> Your account is added to the application automatically, a 6-digit authentication code is shown. |
| Manually add the account | In case you cannot scan the QR code, you can manually add your account and enter the secret key provided by Simu Connect Desktop Client. <br><br> a. On Simu Connect Desktop Client, click **Can't scan** beside the QR code.   A secret key is displayed under the QR code, note it down for later use. <br><br> 3.Scan the QR code to get a 6-digit authentication code. <br><br> Can't scan? <br> JV ⋯⋯ UA <br><br> b. On your mobile phone, open the authenticator application, and select to manually add an account. <br> c. Enter the relevant information and paste the secret key. <br><br> ✏️ **Note:** <br> If you need to complete more configurations for the secret key, you should set **SHA1** as the algorithm for **TOTP** protocol, and set to generate **6-digit** code with an interval of **30** seconds. <br><br> Your account is added to the application, a 6-digit authentication code is shown. |
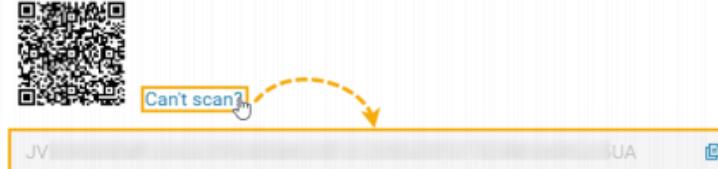
6. On Simu Connect Desktop Client, enter the 6-digit authentication code in the **Authentication Code** field.
7. Click **Save**.

**Result**

- The page 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), contact system administrator to disable the 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 Desktop 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:
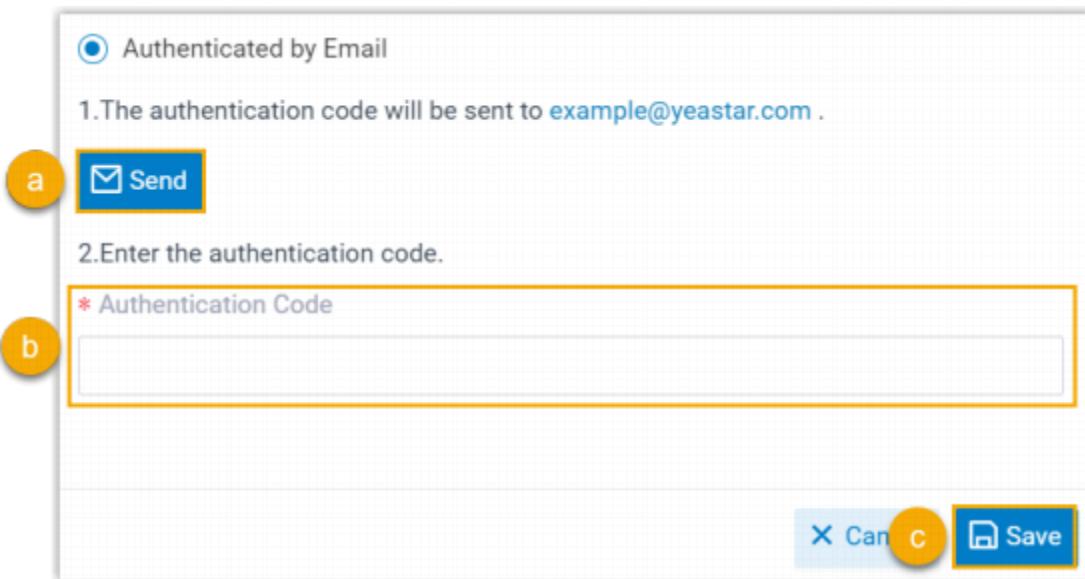
a. Click **Send**.

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 be disabled automatically.

> 🔧 **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), contact system administrator to disable the 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 Desktop Client, click your account, then go to **Change Password & Security > Security Settings**.

   The trusted devices are displayed in the **Trusted Device List** section.
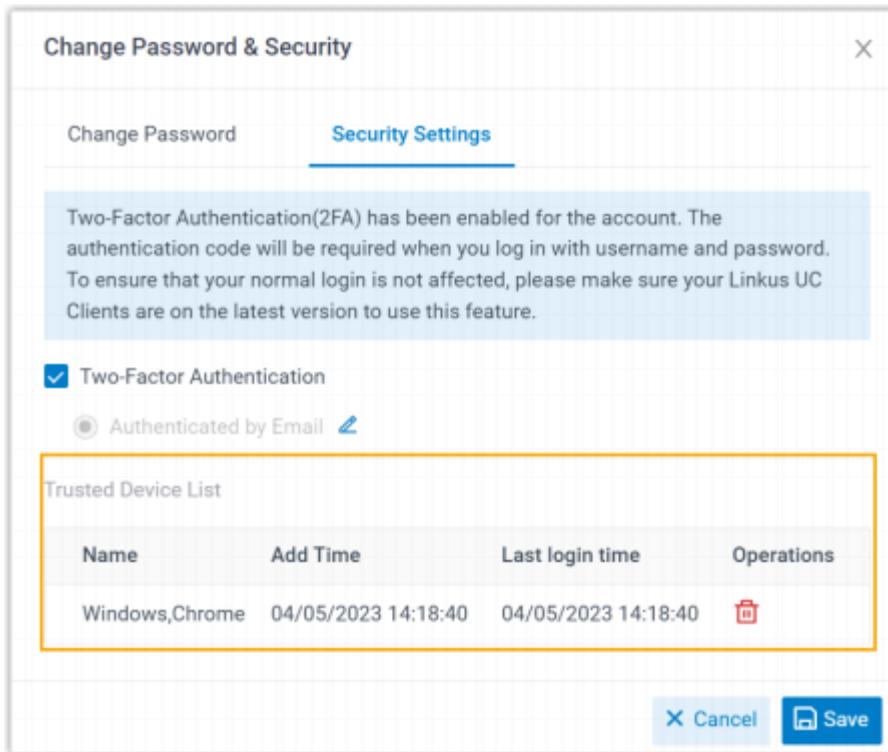
2. Click 🗑 beside the device that you want to remove.
3. In the pop-up window, click **OK**.

## Change two-factor authentication method

1. At the top-right corner of Simu Connect Desktop 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 Desktop 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

## View Colleague Extensions

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

**Procedure**

1. Log in to Simu Connect Desktop Client, go to **Extensions**.
2. **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 dis- played, whether the extensions are registered or not. You can choose to display only the registered extensions. For more information, see [View Registered Extensions Only](#).

- To select a group, click ⊟ at the top-left corner, then select one from the drop- down list.

  Extensions within the group are displayed.
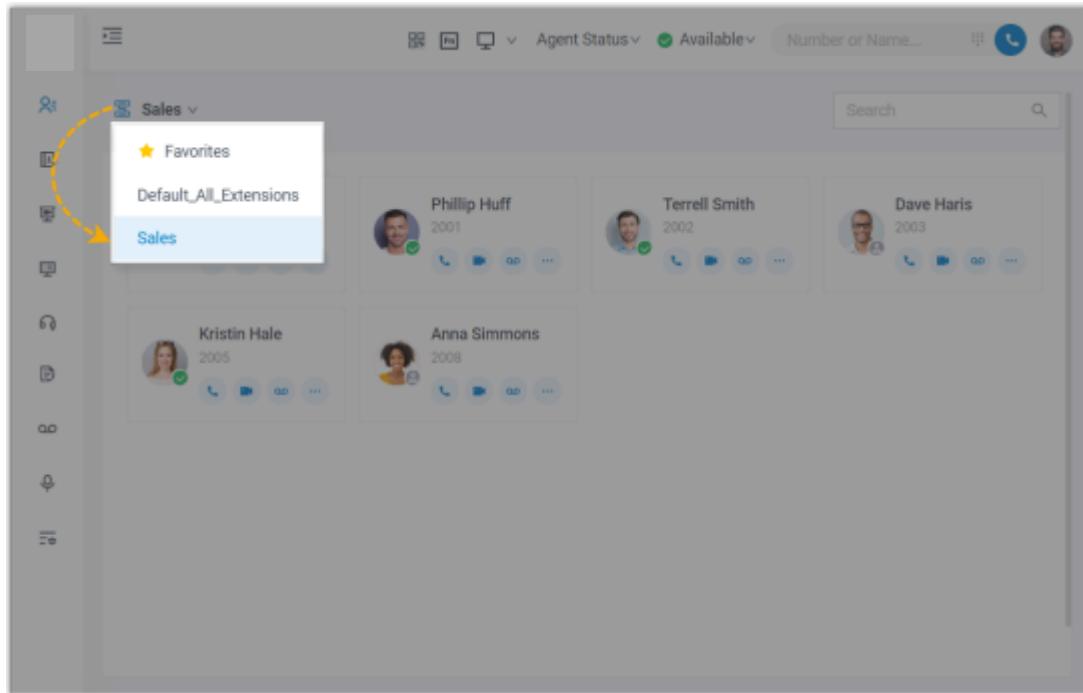
- To select a department, click the desired department from the organizational tree.

  Extensions within the department are displayed.

  Screen shot

3. To view details about a specific colleague, click the contact card.
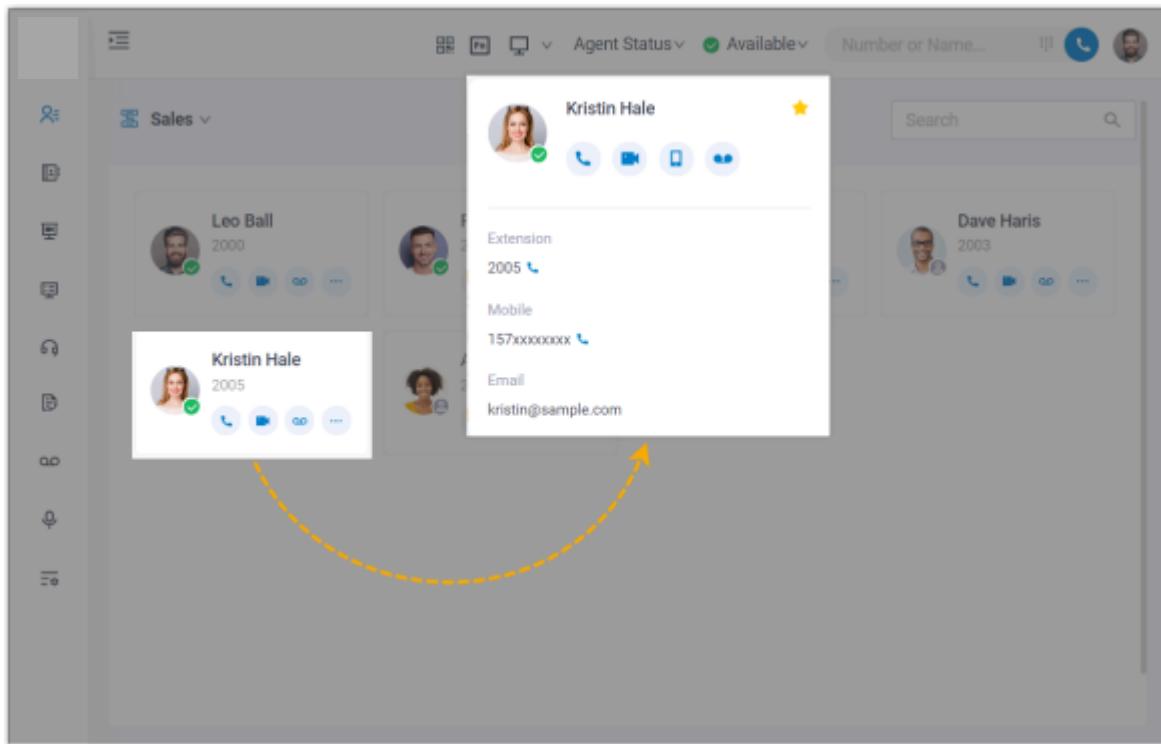
4. **Optional:** Click specific icons to manage or reach colleagues.

| Icon | Description |
|------|-------------|
| ☆ | Add to the **Favorites** list.<br><br>**Note:**<br>• The **Favorites** list is displayed only when you add extensions to favorites. You can see the list by clicking ⬛ at the top-left corner.<br>• For the colleagues whom you communicate with most often, you can add their extensions to the favorite list, so that you can quickly contact them. |
| 📞 | Place an audio call to the extension. |
| 🎥 | Place a video call to the extension. |
| 📱 | Call mobile number. |
| 📼 | Leave a voicemail to the extension. |

# View Registered Extensions Only

By default, all the extensions within the selected group or department are displayed on Simu Connect Desktop Client, whether the extensions are registered or not. You can configure to show only the registered extensions.

**Procedure**

1. Log in to Simu Connect Desktop Client, go to **Preferences > User > Status View**.
2. Unselect the checkbox of **Show Unregistered Extensions**.
3. Click **Save**.

# 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
- **Simu Connect Desktop Client**: 1.6.0 or later
- **Extension**: Your extension has been assigned the **Allow Call Operations in the Extension Page** permission.

**Procedure**

1. Log in to Simu Connect Desktop 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 📞 .

Screen shoot

3. Manage colleague extension's call as needed.
    • For colleague extension that initiates a call, you can click the call status label, then choose to hang up the call.

    Screen shoot

- 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.

Screen shoot

- 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.

Screen shoot

# Contacts

## Contacts Overview

Simu Connect Contacts provides an overview of your external contacts that are stored on the server. The Simu Connect Contacts is subdivided into two types, namely personally managed contacts (stored in **Personal Contacts**) and shared contacts (stored in **Company Contacts** or phone-book).

### Personal Contacts

The **Personal Contacts** is only visible to yourself. You can store your own external contacts (such as direct customers) in it.

For more information, see the following topics:

- Add a Personal Contact
- Manage Personal Contacts
- Import and Export Personal Contacts

### Company Contacts

The **Company Contacts** or phonebook is shared among authorized colleagues. You can store external contacts (such as company's customers, resellers, and partners) in it, so as to share contact information with your team members and thus enhancing team collaboration.

> **Note:**
> If you fail to see **Company Contacts** or specific phonebooks, it indicates that you don't have the viewing permission. Contact system administrator to grant you the permission if necessary.

For more information, see the following topics:

- Add a Company Contact
- Manage Company Contacts

**Favorite Contacts**

For contacts (both **Personal Contacts** and **Company Contacts**) that you are frequently or commonly communicated with, you can mark them as favorites. The marked contacts will be displayed in the **Favorite Contacts** list for quick location and retrieval. For more information, see Mark or Remove Favorite Contacts.

# Personal Contacts

## Add a Personal Contact

This topic describes how to add a personal contact. The personal contacts you add will be synchronized across your Simu Connect UC Clients and are only visible to yourself, other colleagues cannot see your personal contacts.

**Supported methods**

Simu Connect Desktop Client supports to add a personal contact via any of the following methods:

- Manually add a personal contact
- 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 from company contacts

**Manually add a personal contact**

1. On Simu Connect Desktop Client, go to **Contacts**.

2. At the top-left corner, click ☰, then select **Personal Contacts** from the drop-down list.

Screen shoot

3. Click **Add**.
4. On the contact details page, enter the information of the contact.
5. Click **Save**.

## Add a personal contact from call logs

You can directly add an unknown number from call log to your Personal Contacts.

1. On Simu Connect Desktop Client, go to **Call Logs**.
2. Right click the desired record.
3. To add the contact as a new contact, do as follows:

   a. Click **Add New Contact**.

   You are redirected to a contact details page, and the number is automatically added to the number list.

   b. In the **Add to** drop-down list, select **Personal Contacts**.



   c. Edit the type of the number, and enter the information of the contact as needed.
   d. Click **Save**.
4. To add the contact to an existing contact, do as follows:

   a. Click **Add to Existing Contact**.

   b. In the pop-up window, click ⬚ at the top-left corner, then select **Personal Contacts**.

    c. Search and select an existing contact, then click **Confirm**.

       You are redirected to the contact details page, and the number is automatically added to the number list.

    d. Edit the type of the new number, and edit the information of the contact as needed.

    e. Click **Save**.

## Add a personal contact from Voicemails list

You can directly add an unknown number from Voicemails list to your Personal Contacts.

1. On Simu Connect Desktop Client, go to **Voicemails**.
2. Right click the desired record.
3. To add the contact as a new contact, do as follows:

    a. Click **Add New Contact**.

       You are redirected to a contact details page, and the number is automatically added to the number list.

    b. In the **Add to** drop-down list, select **Personal Contacts**.



    c. Edit the type of the number, and enter the information of the contact as needed.

    d. Click **Save**.

4. To add the contact to an existing contact, do as follows:

    a. Click **Add to Existing Contact**.

b. In the pop-up window, click 🖳 at the top-left corner, then select **Personal Contacts**.



c. Search and select an existing contact, then click **Confirm**.

You are redirected to the contact details page, and the number is automatically added to the number list.

d. Edit the type of the new number, and edit the information of the contact as needed.

e. Click **Save**.

## Add a personal contact from Recordings list

You can directly add an unknown number from Recordings list to your Personal Contacts.

1. On Simu Connect Desktop Client, go to **Recordings**.
2. Right click the desired record.
3. To add the contact as a new contact, do as follows:

   a. Click **Add New Contact**.

   You are redirected to a contact details page, and the number is automatically added to the number list.

   b. In the **Add to** drop-down list, select **Personal Contacts**.

   

   c. Edit the type of the number, and enter the information of the contact as needed.

   d. Click **Save**.

4. To add the contact to an existing contact, do as follows:

a. Click **Add to Existing Contact**.

b. In the pop-up window, click ⬚ at the top-left corner, then select **Personal Contacts**.



c. Search and select an existing contact, then click **Confirm**.

You are redirected to the contact details page, and the number is automatically added to the number list.

d. Edit the type of the new number, and edit the information of the contact as needed.

e. Click **Save**.

## Add a personal contact from company contacts

If system administrator has granted you the permission to manage company contacts, you can directly add a company contact to your Personal Contacts.

1. On Simu Connect Desktop Client, go to **Contacts**.

2. At the top-left corner, click ⬚, then select **Company Contacts** or the phonebook where the company contact is stored.

Screen shoot

3. On the contact card, click **. . .**, then click **Add to Personal Contacts**.

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

**Related information**

[Manage Personal Contacts](#)
[Import and Export Personal Contacts](#)

# Manage Personal Contacts

This topic describes how to edit and delete your personal contacts on Simu Connect Desktop
Client. The changes will be synchronized across your Simu Connect UC Clients.

## Edit a personal contact

1. On Simu Connect Desktop Client, go to **Contacts**.

2. At the top-left corner, click , then select **Personal Contacts** from the drop-down list.

3. On the desired contact card, click  .

4. Edit the contact's information as needed, then click **Save**.

## Delete a personal contact

1. On Simu Connect Desktop Client, go to **Contacts**.

2. At the top-left corner, click , then select **Personal Contacts** from the drop-down list.

Screen shoot

3. On the desired contact card, click. . ., then click **Delete**.
4. In the pop-up window, click **OK**.

# Import and Export Personal Contacts

This topic describes how to import and export personal contacts on Simu Connect Desktop Client.

## Export personal contacts

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

1. On Simu Connect Desktop Client, go to **Contacts**.
2. At the top-left corner, click , then select **Personal Contacts** from the drop-down list.
3. On the top of the page, click **Export**.
4. In the pop-up window, save the downloaded file to a desired location.

## 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 Contacts Parameters.

### Procedure

1. On Simu Connect Desktop Client, go to **Contacts**.

2. At the top-left corner, click 🔳, then select **Personal Contacts** from the drop-down list.

   Screen shoot

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

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

# Company Contacts

## Add a Company Contact

This topic describes how to add a company contact. The company contacts you add will be synchronized across your Simu Connect UC Clients and the server, and be shared with other authorized colleagues.

### Requirements

System administrator has granted you the permission to manage company contacts or specific phonebooks.

### Supported methods

Simu Connect supports to add a company contact via any of the following methods:

- Manually add a company contact
- Add a company contact from call logs
- Add a company contact from Voicemails list
- Add a company contact from Recordings list
- Add a company contact from personal contacts

### Manually add a company contact

1. On Simu Connect Desktop Client, go to **Contacts**.

2. At the top-left corner, click ▤, then select **Company Contacts** or the phonebook where you want to add a company contact.

3. Click **Add**.

4. On the contact details page, enter the information of the contact.

5. Click **Save**.

## Add a company contact from call logs

You can directly add an unknown number from call logs to Company Contacts.

1. On Simu Connect Desktop Client, go to **Call Logs**.
2. Right click the desired record.
3. To add the contact as a new contact, do as follows:

   a. Click **Add New Contact**.

   You are redirected to a contact details page, and the number is automatically added to the number list.

   b. In the **Add to** drop-down list, select **Company Contacts**, then select the specific phonebook(s) where you want to store the contact from the **Phonebook List**.



   c. Edit the type of the number, and enter the information of the contact as needed.

   d. Click **Save**.

4. To add the contact to an existing contact, do as follows:

   a. Click **Add to Existing Contact**.

   b. In the pop-up window, click ⬒ at the top-left corner, then select **Company Contacts** or the phonebook where the existing contact is stored.



   c. Search and select an existing contact, then click **Confirm**.

You are redirected to the contact details page, and the number is automatically added to the number list.

d. Edit the type of the number, and enter the information of the contact as needed.

e. Click **Save**.

## Add a company contact from Voicemails list

You can directly add an unknown number from Voicemails list to your Company Contacts.

1. On Simu Connect Desktop Client, go to **Voicemails**.
2. Right click the desired record.
3. To add the contact as a new contact, do as follows:

    a. Click **Add New Contact**.

       You are redirected to a contact details page, and the number is automatically added to the number list.

    b. In the **Add to** drop-down list, select **Company Contacts**, then select the specific phonebook(s) where you want to store the contact from the **Phonebook List**.



    c. Edit the type of the number, and enter the information of the contact as needed.

    d. Click **Save**.

4. To add the contact to an existing contact, do as follows:

    a. Click **Add to Existing Contact**.

    b. In the pop-up window, click [icon] at the top-left corner, then select **Company Contacts** or the phonebook where the existing contact is stored.

c. Search and select an existing contact, then click **Confirm**.

You are redirected to the contact details page, and the number is automatically added to the number list.

d. Edit the type of the number, and enter the information of the contact as needed. e. Click **Save**.

## Add a company contact from Recordings list

You can directly add an unknown number from Recordings list to Company Contacts.

1. On Simu Connect Desktop Client, go to **Recordings**.
2. Right click the desired record.
3. To add the contact as a new contact, do as follows:

   a. Click **Add New Contact**.

   You are redirected to a contact details page, and the number is automatically added to the number list.

   b. In the **Add to** drop-down list, select **Company Contacts**, then select the specific phonebook(s) where you want to store the contact from the **Phonebook List**.



   c. Edit the type of the number, and enter the information of the contact as needed.
   d. Click **Save**.
4. To add the contact to an existing contact, do as follows:

   a. Click **Add to Existing Contact**.

   b. In the pop-up window, click ⊟ at the top-left corner, then select **Company Contacts** or the phonebook where the existing contact is stored.

c. Search and select an existing contact, then click **Confirm**.

You are redirected to the contact details page, and the number is automatically added to the number list.

d. Edit the type of the number, and enter the information of the contact as needed. e. Click **Save**.

## Add a company contact from personal contacts

You can directly add a personal contact to Company Contacts for contact-sharing with your team members.

1. On Simu Connect Desktop Client, go to **Contacts**.

2. At the top-left corner, click ⛁, then select **Personal Contacts** from the drop-down list.

   Screen shoot

3. On the desired contact card, click **. . .**, then click **Add to Company Contacts** or **Add to Phonebooks**.

> ✏️ **Note:**
> The option varies depending on the server's subscription.

4. If you select **Add to Phonebooks**, you need to select the specific phonebook where you want to store the contact in the pop-up window, then click **Confirm**.

   The page prompts "Added successfully", which indicates that the personal contact is added as a company contact.

**Related information**

   [Manage Company Contacts](#)

# Manage Company Contacts

This topic describes how to edit and delete company contacts on Simu Connect Desktop Client.
The changes will be synchronized across your Simu Connect UC Clients and the server.

## Requirements

System administrator has granted you the permission to manage company contacts or specific phonebooks.

## Edit a company contact

1. On Simu Connect Desktop Client, go to **Contacts**.

2. At the top-left corner, click ⊟, then select **Company Contacts** or the phonebook where the company contact is stored.

   Screen shoot

3. On the desired contact card, click ✎ .

4. Edit the contact's information as needed, then click **Save**.

## Delete a company contact

> ⚠️ **Important:**
> Think twice before you delete a company contact, because when you delete a
> company contact on your app name, the contact information will also be deleted on
> the server.

1. On Simu Connect Desktop Client, go to **Contacts**.

2. At the top-left corner, click ⊟, then select **Company Contacts** or the phonebook
   where the company contact is stored.

   Screen shoot

3. On the desired contact card, click **. . .**, then click **Delete**.
4. In the pop-up window, click **OK**.

# Mark or Remove Favorite Contacts

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

### Requirements

Your Simu Connect version meets the following requirement:

- **Simu Connect Windows Desktop**: Version 1.4.9 or later
- **Simu Connect Mac Desktop**: Version 1.4.9 or later

### Mark a favorite contact

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

1. On Simu Connect Desktop Client, click **Contacts**.
2. Find the desired contact, click **. . .** and select **Add to Favorite Contacts**.
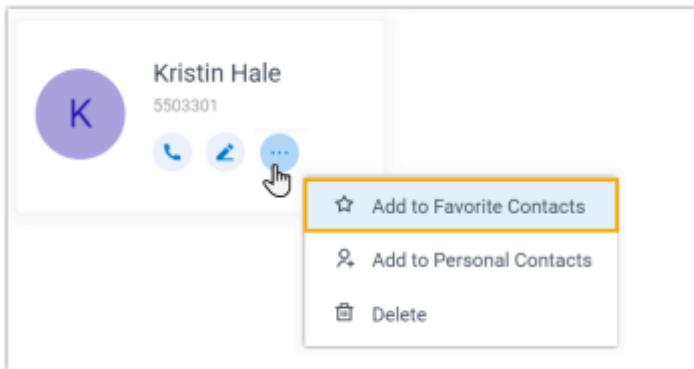


This contact is marked as favorites, which can be found in the **Favorite Contacts** list.

Screen shoot

## Remove a favorite contact

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

Screen shoot

3. Find the desired contact, click **. . .** and select **Remove from Favorite Contacts**.
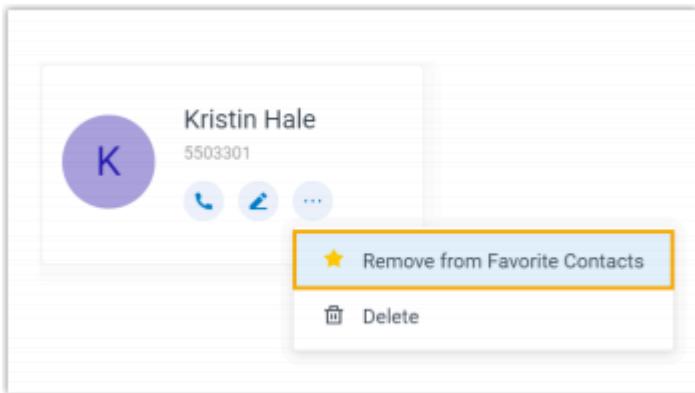
This contact is removed from your **Favorite Contacts** list.

# Chat

## Internal Chat

### Simu Connect Desktop 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 Desktop Client internal chat**

Screen shoot

**Requirements**

**PBX Server**

- **Version**: 84.12.0.32 or later

- **Plan**: **Enterprise Plan** or **Ultimate Plan Simu Connect Desktop Client**
  - **Version**:
    - **Widows Desktop**: 1.2.14 or later
    - **macOS Desktop**: 1.2.10 or later

## 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 personal 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 pictures; Make an audio or video call within a click.

# Start a Chat Session with Colleagues

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

## Prerequisites

- 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**

- Make sure that the version of your Simu Connect Desktop Client meets with the
  following version requirements:
    - **Windows Desktop**: 1.2.14 or later
    - **macOS Desktop**: 1.2.10 or later

## Procedure

1. Log in to Simu Connect Desktop 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:
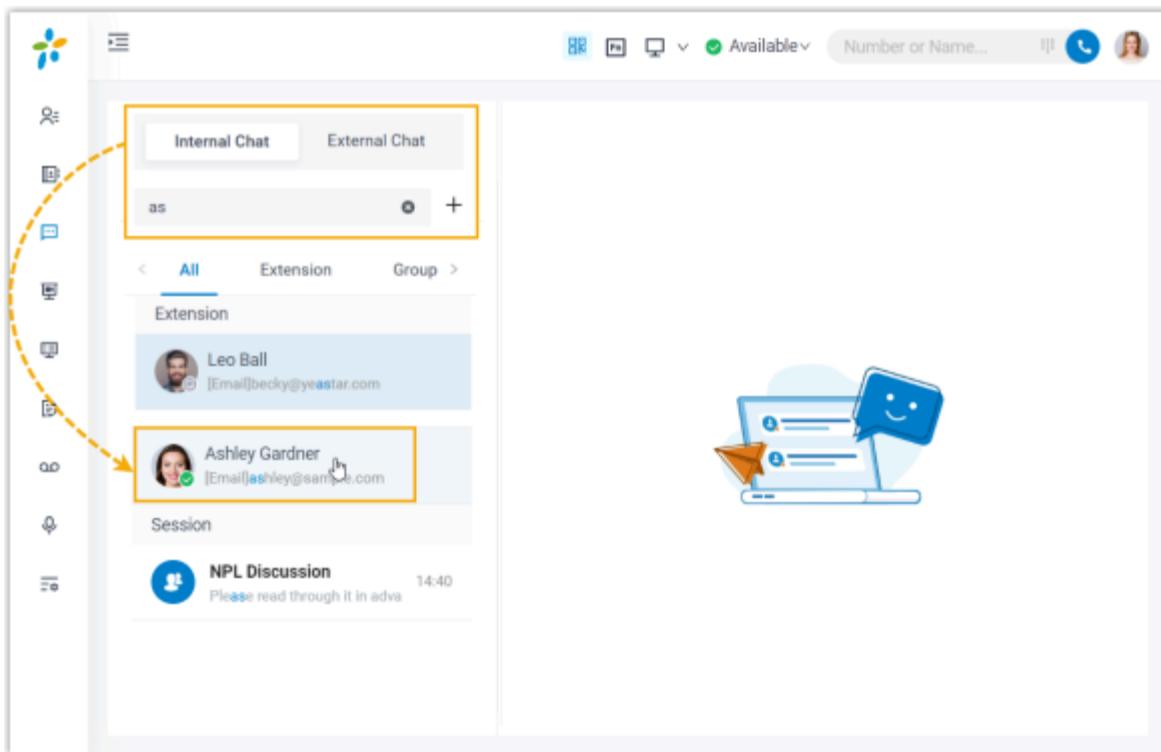


    a. At the left panel, enter a value (name, number, email address or a chat history)
       in the search bar to find the desired colleague.
    b. Click the matched colleague.
4. To start a group chat with multiple colleagues, do as follows:

    a. Click ✛ right beside the search bar.
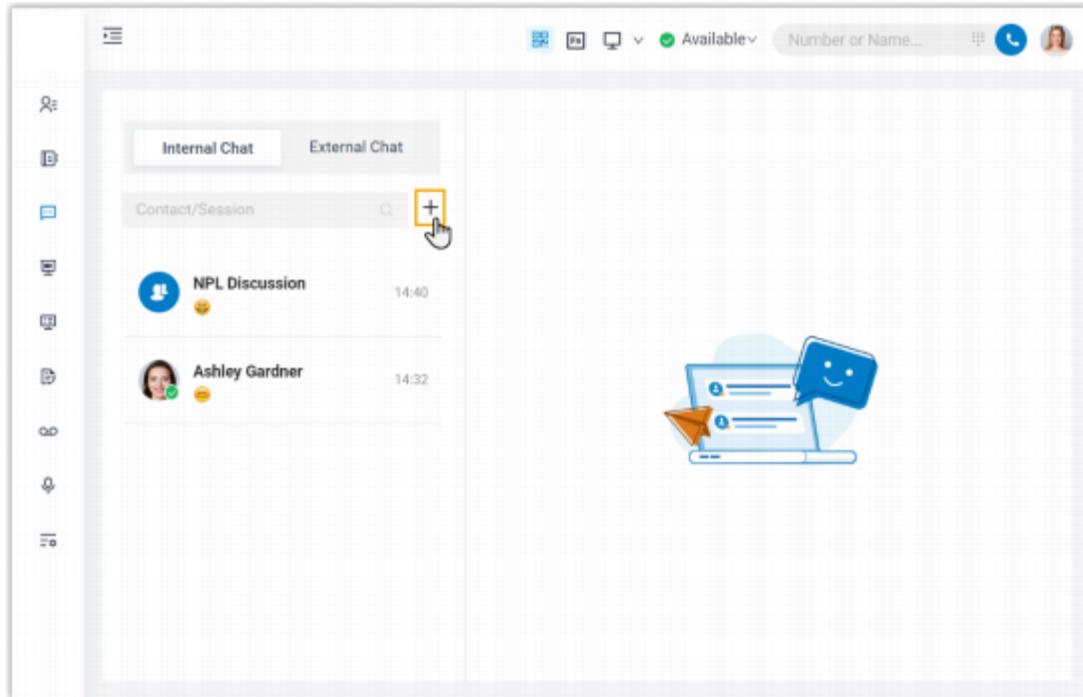
b. In the pop-up window, select desired colleagues, then click **Create**.

> **Note:**
> Up to 200 members can be in a group chat.

# External Chat

## Simu Connect Desktop 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 Desktop Client.

## Preview of Simu Connect Desktop Client external chat
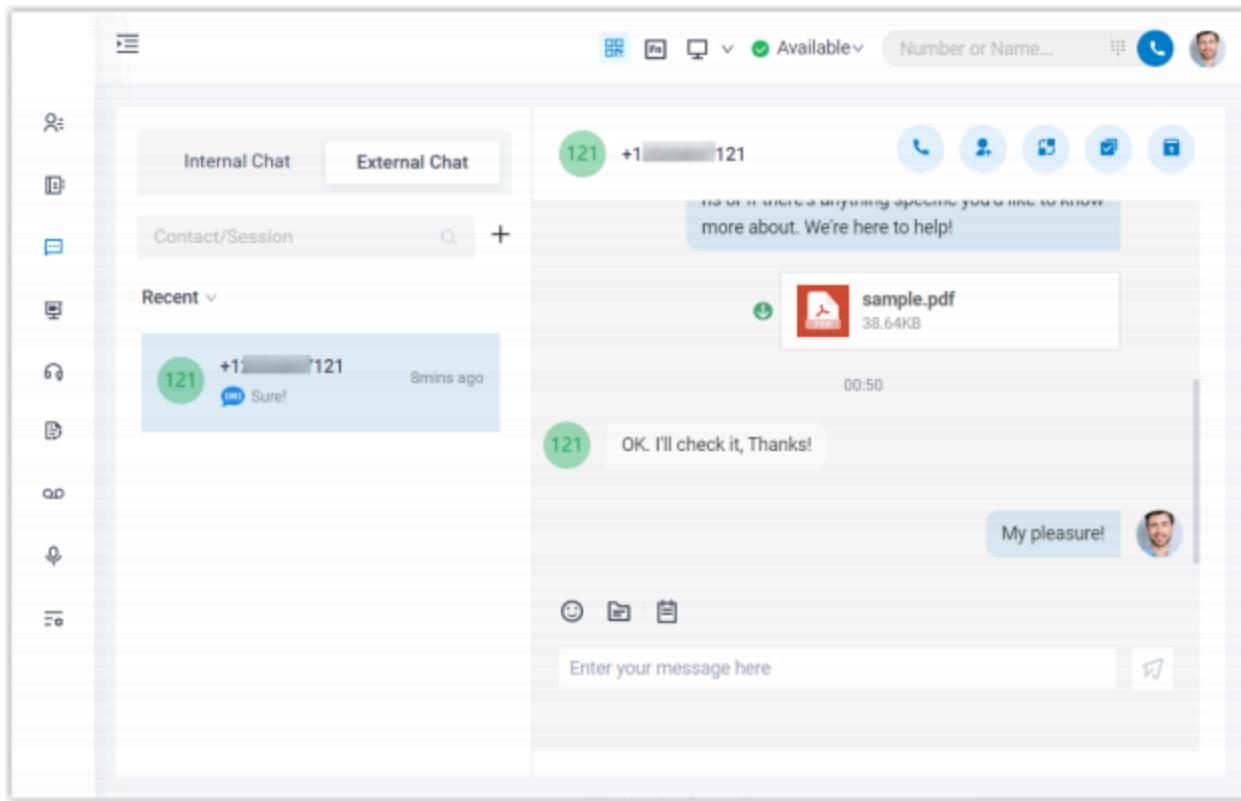


## Requirements

### PBX Server

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

### Simu Connect Desktop Client

- **Version**:
  ◦ **Widows Desktop**: 1.2.14 or later
  ◦ **macOS Desktop**: 1.2.10 or later

## Channel types

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

- [SMS]: The message is sent from SMS channel.

- [WhatsApp]: The message is sent from WhatsApp channel.

- [Facebook]: The message is sent from Facebook channel.

- [Live Chat]: 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 that has been inactive for 24 hours. | Depends on system administrator's configurations. | |
| Messaging mechanism | You can receive and reply to customers' inbound messages, and can initiate a messaging session. | You can 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.

### Instructions

For more information about how to use the external chat, see [Manage Customer Queries](#) [from External Messaging Channels](#).

### Related information

[Configure Chat Notifications](#)

# Configure Chat Notifications

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 (specific setting)

1. On Simu Connect Desktop 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 |
|---|---|
| Figure 3. **Mute notifications for a chat**  | a. Right click on the chat. b. Click **Mute notifications**. 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. |
| Figure 4. **Unmute notifications for a chat**  | a. Right click on the chat. b. Click **New message notifications**. When there are new messages, you will receive new message notifications. |
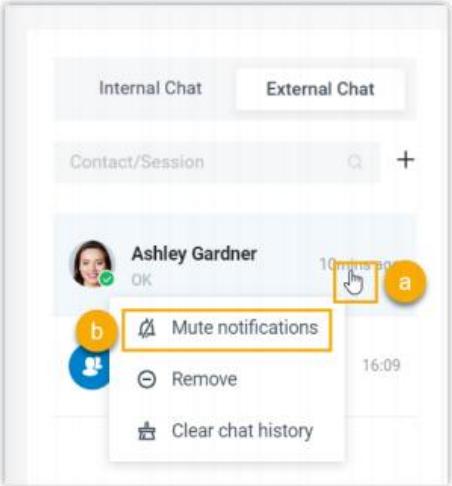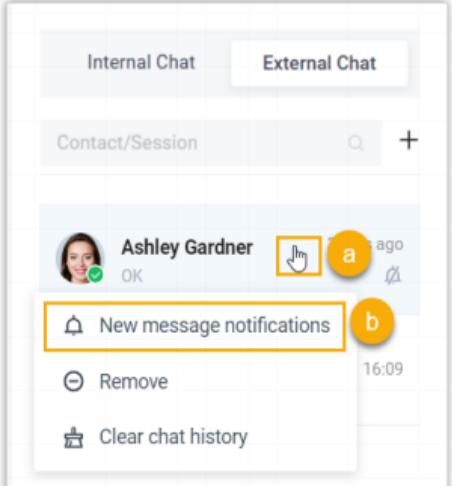
## Configure new message notifications (pop-up and sound) for all chats (global settings)

By default, Simu Connect Desktop Client plays a sound and displays a pop-up when a new message arrives. You can decide whether to enable the notification or not, and the settings will be applied to both Simu Connect internal chats and external chats.

1. Access the **Settings** menu of Simu Connect Desktop Client based on your operating system.

| Operating System | Instruction |
|---|---|
| Windows | On the system tray, right click  **> Settings**<br><br>Screen shoot<br><br><br><br><br>. |
| macOS | On the App menu, click **Simu Connect Desktop Client > Settings**.<br><br>Screen shoot |

2. In the **Notifications** section, change the chat notification settings as needed.

Notifications  ☑ New message notifications

☑ Play sound for new messages
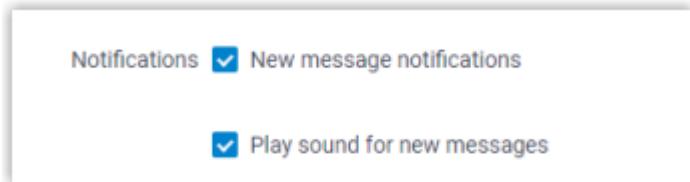
- **New message notifications**: If enabled, upon receiving a new message, you will see a pop-up notification displayed at the bottom-right corner of your desktop.

Linkus Desktop Client     ...     ✕

Ashley Gardner
Hello
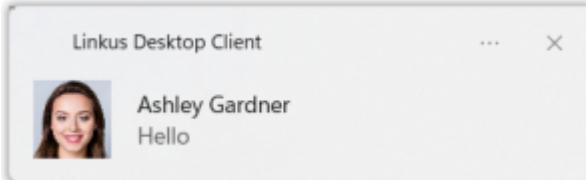
- **Play sound for new messages**: If enabled, upon receiving a new message, Simu Connect Desktop Client will play a sound to notify you.

# CTI

## Simu Connect Desktop Client CTI Overview

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

You can control IP phones and Simu Connect Web Client via Simu Connect Desktop 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 1. Supported call operations**

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

**Table 2. 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 |
| 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 |

**Table 2. Compatible Yealink IP phones (continued)**

| Phone Model | Firmware Version |
| --- | --- |
| SIP-T44W | 108.86.0.90 or later |
| SIP-T52S | 70.84.0.70 or later |
| 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 3. 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 |

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

| Phone Model | Firmware Version |
| --- | --- |
| X5S | 2.2.1 or later |
| X6 | 2.2.1 or later |
| 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 |
| A320 | 2.6.0.1402 or later |
| A320i | 2.6.0.1402 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 |
| V67 | 2.6.0 or later |
| X301 | 2.12.2 or later |

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

| Phone Model | Firmware Version |
| --- | --- |
| X301G | 2.12.2 or later |
| X301W | 2.12.2 or later |
| 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 4. 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 |

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

| Phone Model | Firmware Version |
|---|---|
| D385 | 10.1.73.16 or later |
| D710 | 8.9.3.80 or later |
| 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 5. 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 Desktop Client

By enabling CTI mode on Simu Connect Desktop Client, a Yealink IP phone with your extension registered can be connected to your Simu Connect Desktop Client. In this way, Simu Connect Desktop Client acts as a visual control panel where you can manage phone calls, 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 Desktop Client CTI.

> **Tip:**
> For incompatible IP phones, refer to Control an Incompatible IP phone by your app name Desktop Client for instructions on phone control.

## Requirements

### PBX server

The **uaCSTA** feature is enabled (Path: **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 Desktop 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 Desktop Client.

If system administrator has registered your extension to the IP phone manually, you need to set the IP phone to be controllable as follows.

The following instructions take Yealink T56A as an example to show how to enable the 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**.
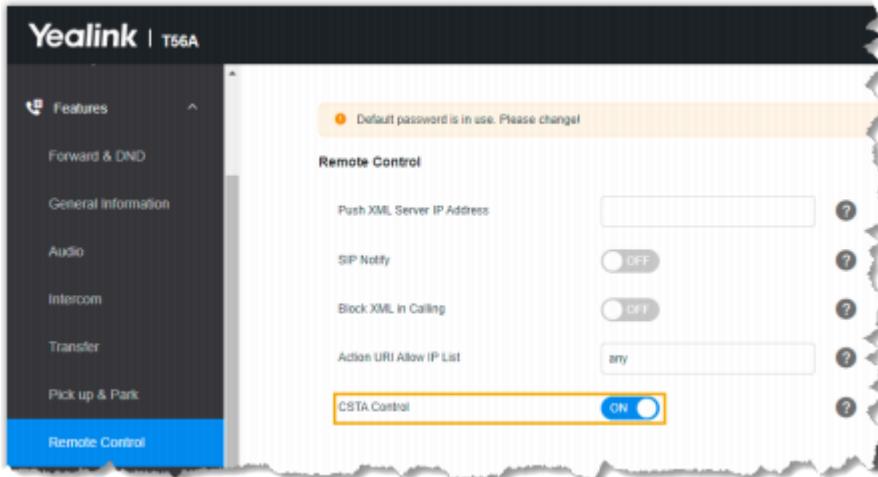


4. Click **Confirm**.
5. In the pop-up dialog box, click **OK** to reboot the phone.

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

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

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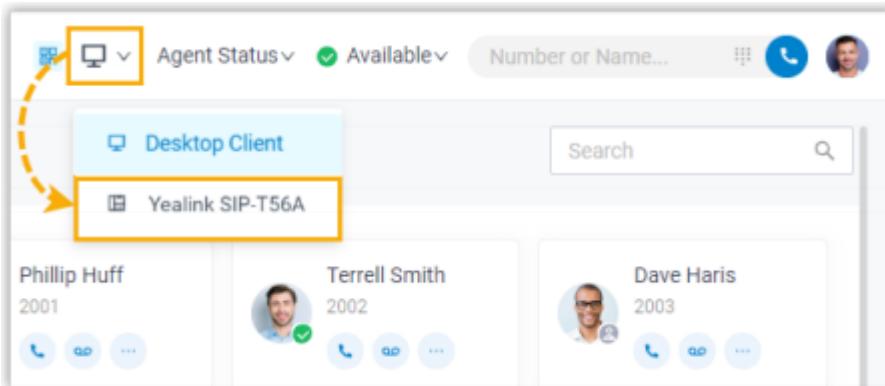
**Result**

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

By enabling CTI mode on Simu Connect Desktop Client, a Fanvil IP phone with your extension registered can be connected to your Simu Connect Desktop Client. In this way, Simu Connect Desktop Client  acts as a visual control panel where you can manage phone calls, 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 Desktop Client CTI.

> **ⓘ Tip:**
> For incompatible IP phones, refer to Control an Incompatible IP phone by your app name Desktop Client for instructions on phone control.

## Requirements

**PBX server**

The **uaCSTA** feature is enabled (Path: **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 Desktop 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 Desktop Client.

If system administrator has registered your extension to the IP phone manually, you need to set the IP phone to be controllable as follows.

The following instructions take Fanvil X5S as an example to show how to enable the uaCSTA function 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 Desktop Client

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

1. Log in to Simu Connect Desktop Client.

2. At the top-right corner, click 🖥 , then select the connected Fanvil IP phone from the drop-down list.
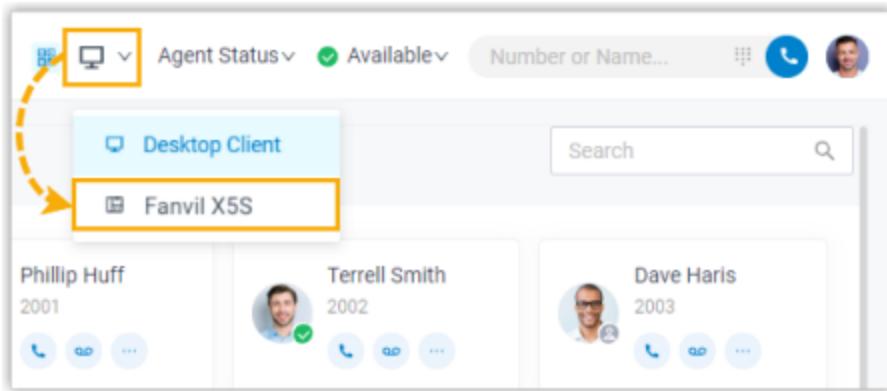
**Result**

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

By enabling CTI mode on Simu Connect Desktop Client, a Snom IP phone with your extension registered can be connected to your Simu Connect Desktop Client. In this way, Simu Connect Desktop Client acts as a visual control panel where you can manage phone calls, 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 Desktop Client CTI.

> **Tip:**
> For incompatible IP phones, refer to <u>Control an Incompatible IP phone by your app name</u> <u>Desktop Client</u> for instructions on phone control.

## Requirements

### PBX server

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

- The version of PBX server is 84.13.0.25 or later.
- The **uaCSTA** feature is enabled (Path: **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 Desktop 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 <u>enable CTI mode on Simu Connect Desktop Client</u>.

If system administrator has registered your extension to the IP phone manually, you need to set the IP phone to be controllable as follows.

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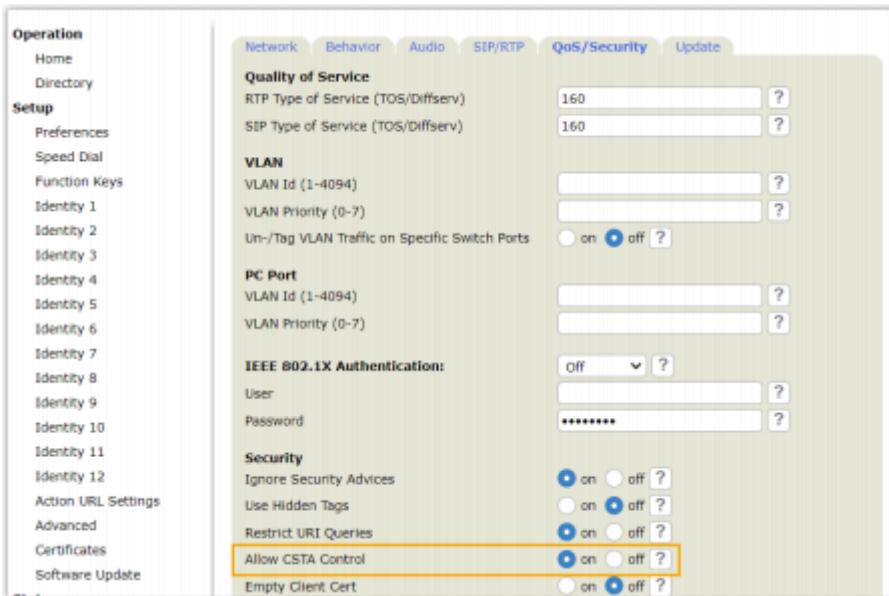
3. At the bottom of the page, click **Apply**.

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

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

1. Log in to Simu Connect Desktop Client.

2. At the top-right corner, click 🖵 , then select the connected Snom IP phone from the drop-down list.
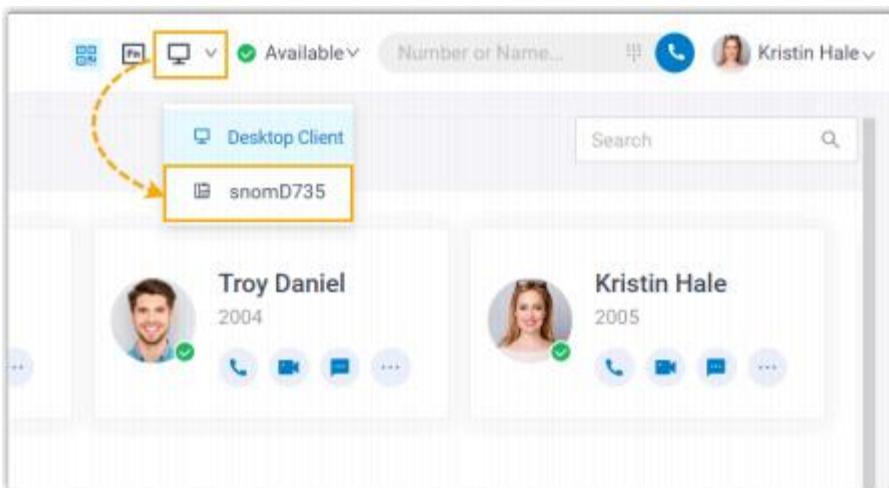
**Result**

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

By enabling CTI mode on Simu Connect Desktop Client, an IP phone with your extension registered can be connected to your Simu Connect Desktop Client. In this way, Simu Connect Desktop 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 phones, 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 Desktop Client.
2. Change Simu Connect Desktop Client to CTI mode.
    a. Log in to Simu Connect Desktop Client.

    b. At the top-right corner, click 🖵 , then select the connected IP phone from the drop-down list.
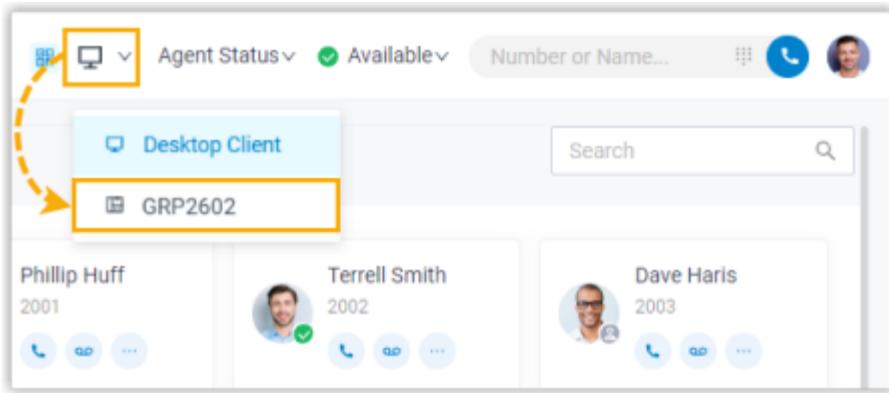
**Result**

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

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

# Control Simu Connect Web Client by Simu Connect Desktop Client

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

## Scenario

Imagine that you use a CRM system to manage customer relationships and contact customers with click-to-dial via Simu Connect Desktop 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 log in to Simu Connect Web Client with your extension on your home computer, then access your work computer to set Simu Connect Desktop Client to remotely control Simu Connect   Web Client via CTI. In doing so, audio streams will be routed through Simu Connect Web 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 | • The firmware version is 84.15.0.74 or later.<br>• The **uaCSTA** feature is enabled (Path: **PBX Settings > SIP Settings > Advanced > Other Options > Enable uaCSTA Connection**). |
| Simu Connect Desktop Client | Version 1.5.4 or later. |
| Simu Connect Web Client | The extension logged in to Simu Connect Web Client is the same as that of Simu Connect Desktop Client. |

## Procedure

1. Log in to Simu Connect Desktop Client.

2. At the top-right corner, click 🖥 , then select **Web Client** from the drop-down list.

   Screen shoot

## Result

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

# Hotkeys

## Set up Hotkeys

Hotkeys (Keyboard Shortcuts) are combinations of keystrokes that allow you to quickly perform specific operations without using the mouse. This topic introduces the supported shortcut operations, and describes how to enable hotkeys for the operations in Simu Connect Desktop Client.

### Requirements

- **PBX Server**: Version 84.12.0.32 or later.
- **Simu Connect Desktop Client**:
  - **Windows Desktop**: 1.2.14 or later
  - **macOS Desktop**: 1.2.10 or later

### Supported shortcut operations and default hotkeys

The following table lists the supported shortcut operations and their default hotkeys. The hotkeys vary depending on your operating system.

| Shortcut Operation | Windows Hotkey | macOS Hotkey |
|---|---|---|
| Dial Selected Number | Ctrl+Shift+E | ⌘+Shift+E |
| Answer | Ctrl+Shift+A | ⌘+Shift+A |
| Blind | Ctrl+Shift+B | ⌘+Shift+B |
| Attended | Ctrl+Shift+T | ⌘+Shift+T |
| Hold/Resume | Ctrl+Shift+H | ⌘+Shift+H |
| Hang Up | Ctrl+Shift+F | ⌘+Shift+F |
| Send Message | Enter | Return |

### Procedure

By default, all the operations using hotkeys are disabled. You can enable desired operations and hotkeys as follows.

1. Access the **Settings** menu of Simu Connect Desktop Client based on your operating system.

| Operating System | Instruction |
|---|---|
| Windows | On the system tray, right click ⊕ > **Settings**<br><br>    Screen shoot<br><br><br><br><br><br><br><br>. |
| macOS | On the App menu, click **Simu Connect Desktop Client > Settings**.<br><br>Screen shoot |

2. In the **Hotkeys** section, do as follows:
   a. **Optional:** To prevent hotkeys from becoming invalid due to hotkey conflicts, you can select the checkbox of **Notify When Hotkey Conflicts** to enable notification.

   

   If enabled, each time you launch and log in to Simu Connect Desktop Client, it will automatically check for hotkey conflicts. If any, a pop-up window will be displayed to prompt the conflict.

b. Enable desired shortcut operations and set up hotkeys.
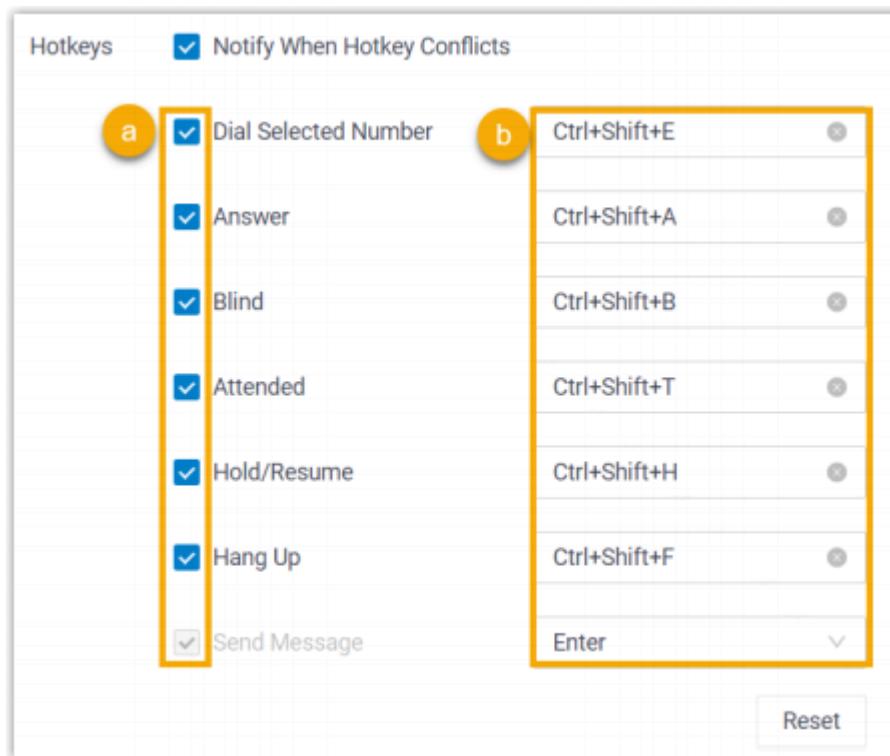


i. Select the checkbox of the desired shortcut operation.
ii. If you want to change the default hotkey, click the hotkey field on the right, then press the desired key combinations on your keyboard.

> **Note:**
> The key combinations must begin with Ctrl, ⌘, Shift, or Alt, and contain at least one alphabetic or numeric character.

**Related information**
[Select and Dial with Hotkey](#)

# Select and Dial with Hotkey

Select & Dial with Hotkey feature allows you to quickly dial any phone numbers appear on your computer screen. No matter where the phone number is stored, you can simply select the number and press the hotkey to quickly dial the phone number via Simu Connect Desktop Client.

## Requirements

- **PBX Server**: Version 84.12.0.32 or later.
- **Simu Connect Desktop Client**:
  ◦ **Windows Desktop**: 1.2.14 or later
  ◦ **macOS Desktop**: 1.2.10 or later

## Step 1. Enable and set up hotkey

By default, the hotkey for 'Select and Dial with Hotkey' is disabled. You need to enable it on Simu Connect Desktop Client.

1. Access the **Settings** menu of Simu Connect Desktop Client based on your operating system.

| Operating System | Instruction |
|---|---|
| Windows | On the system tray, right click ⊕ **>** **Settings**<br><br><br><br><br><br><br><br><br>.<br>Screen shoot |
| macOS | On the App menu, click **Simu Connect Desktop Client > Settings**.<br><br>Screen shoot |

2. In the **Hotkeys** section, do as follows:



   a. Select the checkbox of **Dial Selected Number**.
   b. If you want to change the default hotkey, click the hotkey field on the right, then
      press the desired key combinations on your keyboard.

## Step 2. (Optional) Disable dial out immediately

By default, Simu Connect dials out immediately after you select a number and press the hotkeys. If you want to edit the phone number before dialing out, you can disable **Dial out immediately** setting on Simu Connect Desktop Client.

1. Go to **Settings** page.
2. In the **Call** section, unselect the checkbox of **Dial out immediately**.
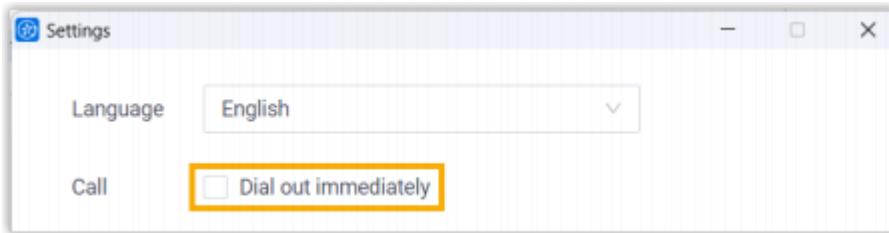


## Example

| Example 1: Select & Dial out immediately | Example 2: Select & Dial out later |
|---|---|
|  |  |

# Calls

## Simu Connect Call Overview

Simu Connect Desktop Client allows you to connect to colleagues and external contacts via audio calls and video calls. This topic describes the requirements for audio call and video call, and the supported call features.

### Requirements

#### Audio call requirements

For audio call, contact system administrator to ensure that the PBX server's configurations are ready:

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

#### Video call requirements

For video call, 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.

### Supported call features

| Call Feature | Description |
|---|---|
| Audio Conferencing | This feature allows you to initiate an instant audio conference during a call. <br><br> **Note:** <br> Up to **9** members are supported. |

| Call Feature | Description |
|---|---|
| | For more information, see Audio Conferencing Overview. |
| Call Flip | This feature allows you to flip an active call from Simu Connect Desktop Client to another device (with your extension registered), without any interruption to the conversation.<br><br>For more information, see Flip an Active Call between Devices. |
| Call Switch | This feature allows you to retrieve an active call from the original device (with your extension registered) to Simu Connect Desktop Client, without any interruption to the conversation.<br><br>For more information, see Continue an Active Call on Simu Connect Desktop Client. |
| Call Transfer | This feature allows you to transfer an ongoing call to another number.<br>For more information, see Transfer a call. |
| Call Merge | This feature allows you to merge two or more active calls into an audio conference call.<br><br>For more information, see Merge Calls into an Audio Conference Call. |
| Call Hold/Resume | This feature allows you to pause your conversation without having to hang up, and resume the call when you are ready.<br><br>**Note:**<br>Allow to hold up to 6 active calls at the same time.<br><br>For more information, see Hold and Resume a Call. |
| Call Recording | This feature allows you to record calls and playback later to review and confirm information.<br><br>For more information, see Record a Call. |
| Call Note | This feature allows you to add tags and remarks for calls, capturing essential information for future reference.<br><br>For more information, see Add Notes to a Call. |

# Flip an Active Call between Devices

Call Flip feature allows you to effortlessly and seamlessly flip an active call from your app name Desktop Client to another device (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.
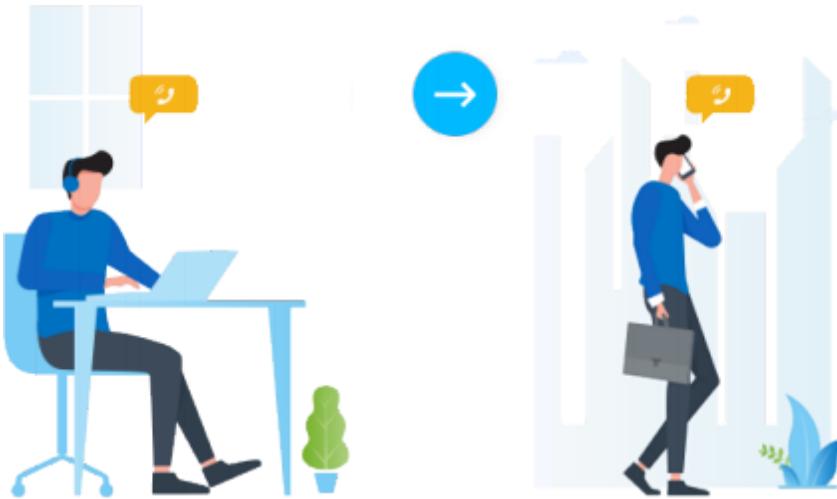
## Requirements

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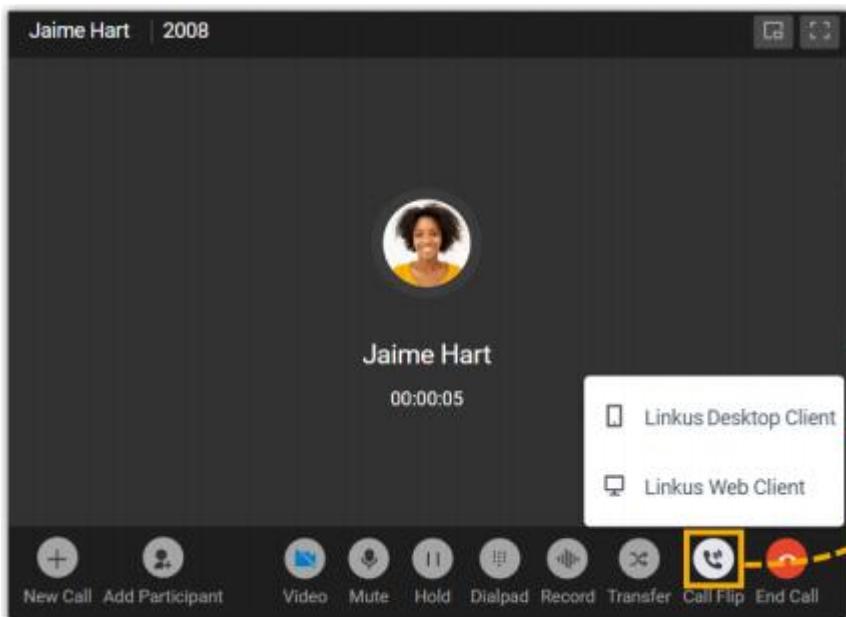
2. Click the desired device.
   Simu Connect will make a call to your extension on the device.

> **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 Desktop Client to the selected device.

**Related information**

# Continue an Active Call on Simu Connect Desktop Client

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

## Scenario

Assume that you answer a call from a customer while on the road, and 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 Desktop Client, keeping talking without customer knowing the switchover.



## Requirements

• **Simu Connect Desktop Client**: In **Desktop Client** mode.
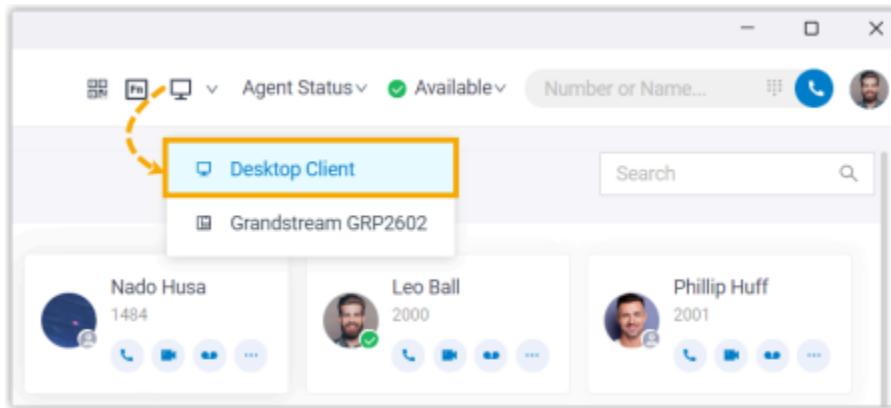
- **Extension**: Your extension has been registered on more than one device.

## Prerequisites

You have an active call on another device.

## Procedure

Screen shoot

1. On the top of Simu Connect Desktop 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 Desktop Client.

**Related information**
> Flip an Active Call between Devices

# Transfer a call

Call Transfer feature allows you to transfer an ongoing call to another number. For example, if you receive a call from a customer who reaches the wrong person or team, you can transfer the call to the correct one rather than asking the customer to hang up and call a different number.

## Types of Call Transfer

There are two types of call transfer:

- **Blind Transfer**: Transfer an ongoing call to a third party immediately without giving him or her prior notification.

  For more information, see <span style="color:blue">Perform a blind transfer</span>.
- **Attended Transfer**: Put the ongoing call on hold and establish a second call with third party to pass on all relevant information and get his or her consent before transferring the call.

  For more information, see <span style="color:blue">Perform an attended transfer</span>.

## Perform a blind transfer

1. During an active call, click ⤧ (**Transfer**) on the call screen, then select **Blind Transfer**.
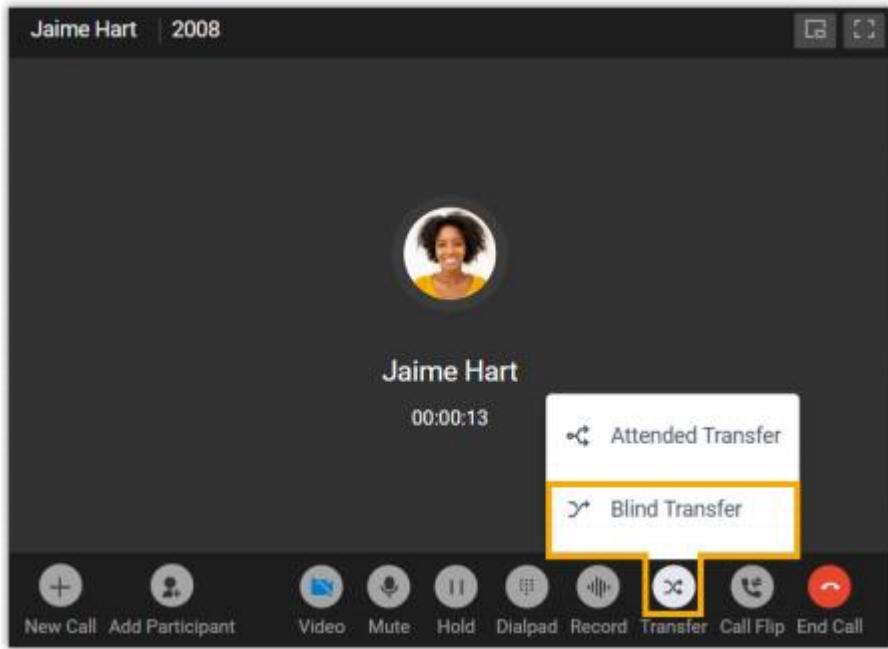
The call is put on hold.
2. Select the desired individual using either of the following methods.
- In the right-panel, select a list and click on the desired extension user or contact who you want to transfer the call to.
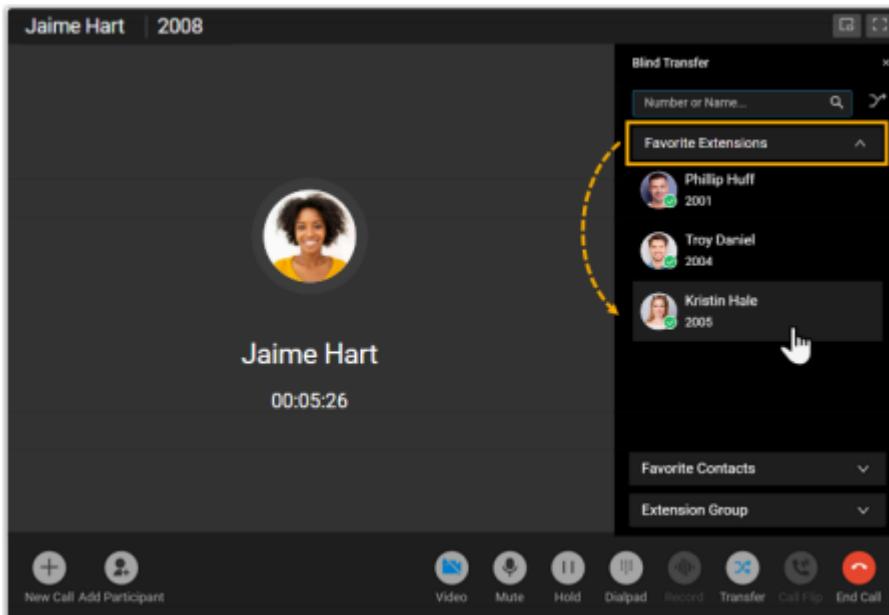


- In the search bar, enter the number or the name of the extension user or contact who you want to transfer the call to, then select the desired number from the result.
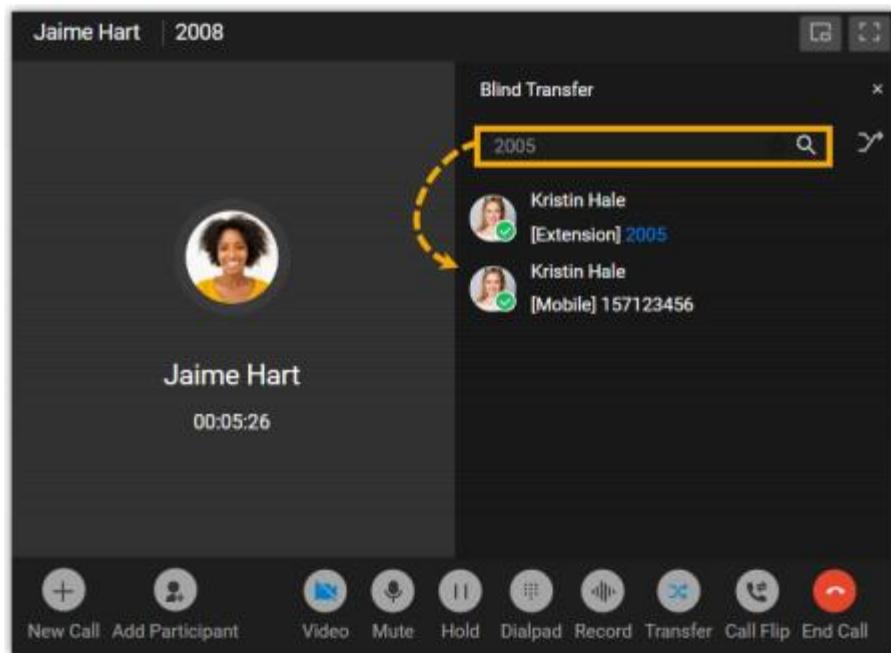
The current call is disconnected; The specified extension user or contact will receive the call. When the call is answered, the other two parties are connected.

## Perform an attended transfer

1. During an active call, click ⤧ (**Transfer**) on the call screen, then select **Attended Transfer**.
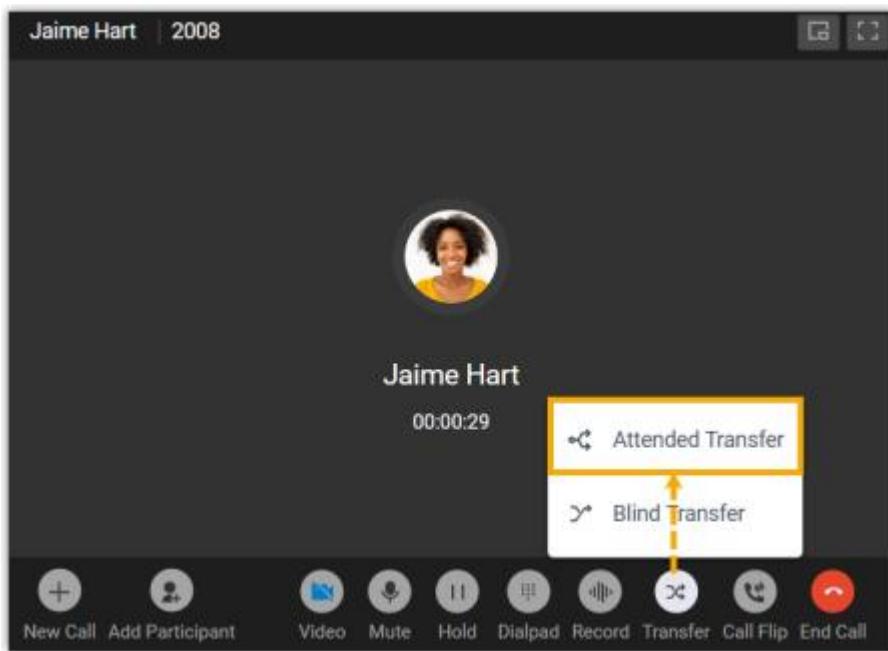
The call is put on hold.
2. Select the desired individual using either of the following methods.
  • In the right-panel, select a list and click on the desired extension user or contact who you want to transfer the call to.
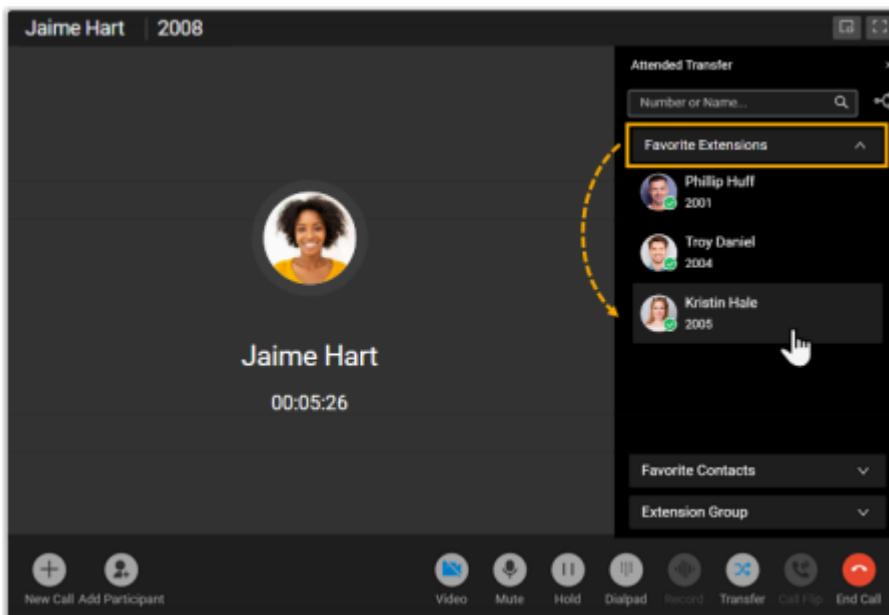


  • In the search bar, enter the number or the name of the extension user or contact who you want to transfer the call to, then select the desired number from the result.
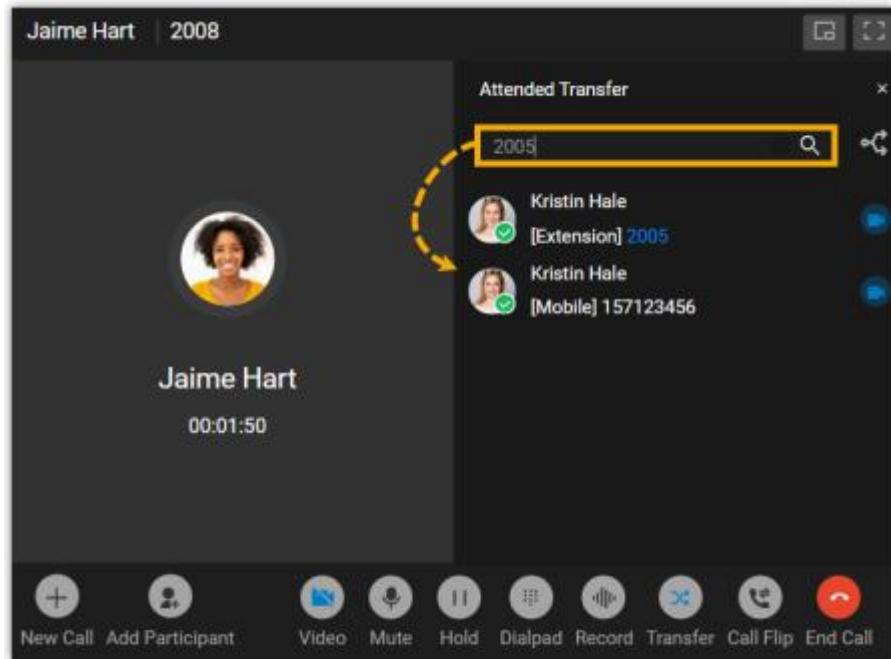
The specified extension user or contact will receive a call.

3. If the specified contact answers the call, you can talk to the contact to pass on all relevant information first, then click **Transfer**.
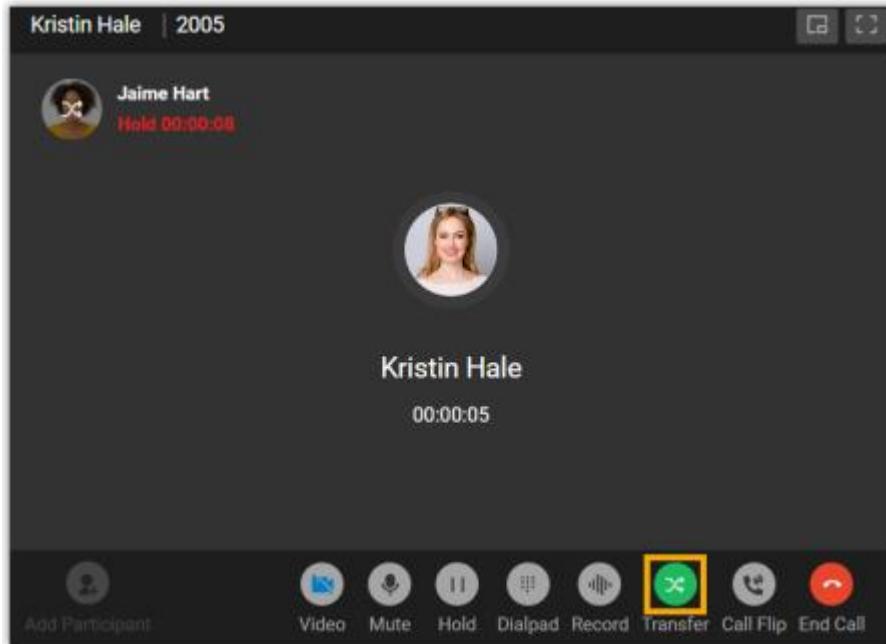


The current call is disconnected; The other two parties are connected.

**Related information**
    [VoIP Features for Dummies - Call Transfer](#)

# Merge Calls into an Audio Conference Call

When there are two active calls or more on Simu Connect Desktop 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

Make sure that the version of Simu Connect Desktop Client meets the following requirements:

- **Windows Desktop**: Version 1.7.3 or later
- **Mac Desktop**: Version 1.7.3 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 Desktop Client** is in **Desktop Client** mode.
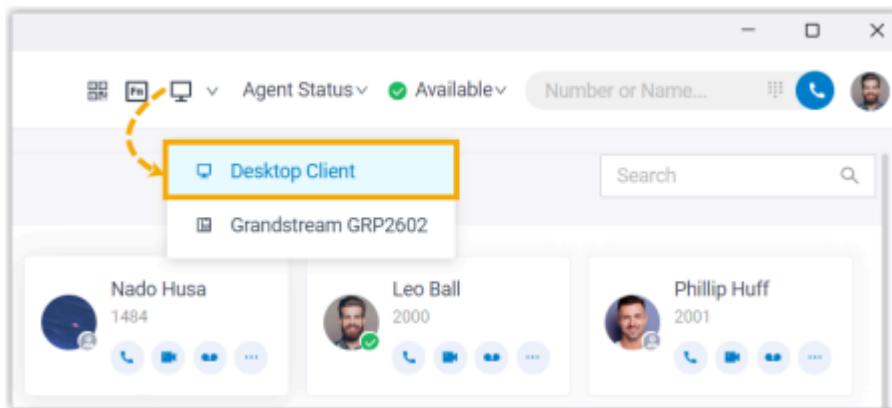


- You have two active calls or more of the same type on Simu Connect Desktop Client.

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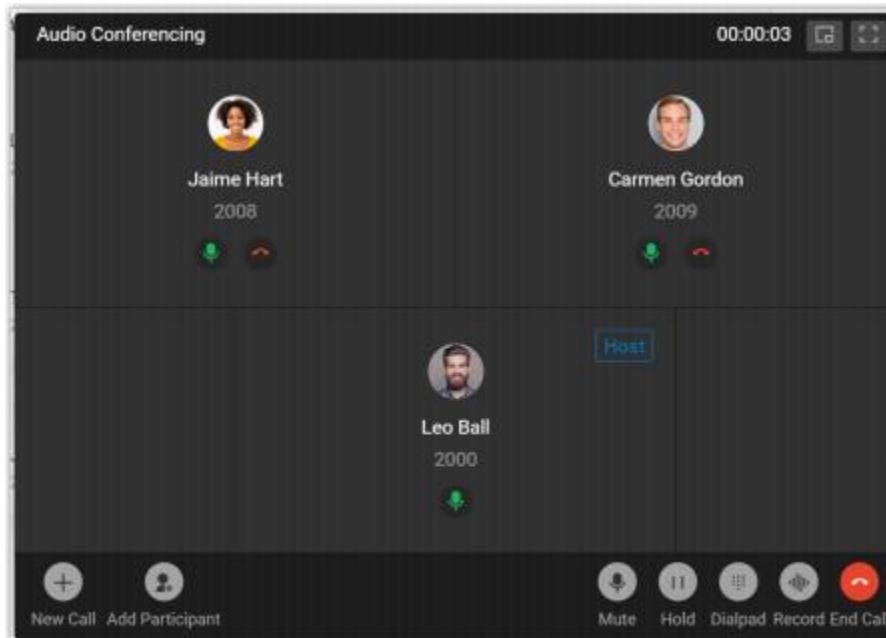


**Related information**

[Audio Conference Call Operations](#)

# Hold and Resume a Call

Call Hold and Resume feature allows you to pause your conversation without having to hang up, and resume the call when you are ready.

**Procedure**

1. To put a call on hold, click $||$ (**Hold**) on the call screen during an active call.

   > **Note:**
   > Allow to hold up to 6 active calls at the same time.

   The held party cannot communicate with you; The held party may hear a piece of music, depending on system administrator's configuration.

2. To resume the call, click $||$ (**Hold**) again.

You can communicate with each other now.

# Record a Call

Call Recording feature allows you to record calls and play back later to review and confirm information.

**Requirements**

System administrator has granted you the permission to record calls.

**Procedure**

During an active call, click 〃|〃 (**Record**) on the call screen.

**Result**

- The call is being recorded.
- Both sides may hear a voice prompt announcing that the call is now being recorded, this depends on system administrator's configuration.

# Select Outbound Caller ID (DOD) to Call

Before making outbound calls from your app name, 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
- **Simu Connect Desktop Client**: Version 1.6.0 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 Desktop Client, go to **Preferences > User > Outbound Caller ID (DOD)**.

   All the selectable DODs are displayed on the list.
2. Customize DOD display as needed.



- **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 不 ∧ ∨ 业 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.
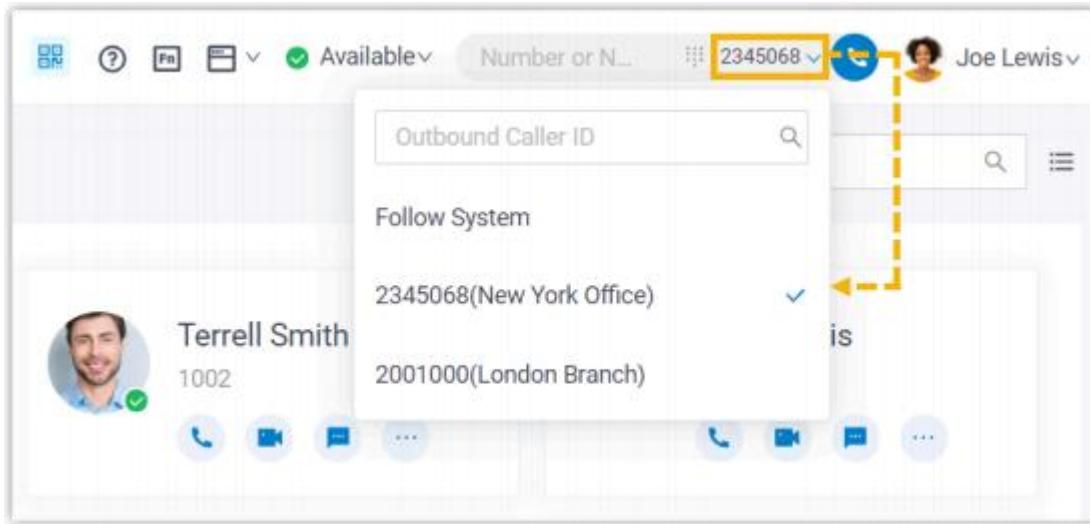
Every time you make an outbound call using Dial pad, the DOD number will be used.

- **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 Dial pad, or from the **Contacts**, **Call Logs**, **Voicemails**, or **Recordings** page, as shown below.

| Page | Instruction |
|---|---|
| Figure 5. `Contacts` | 1. Go to `Contacts` and find the desired contact.<br>2. Click `...` `> Select DOD to Call`, then select a specific DOD number. |
| Figure 6. **Call Logs**, **Voicemails**, or **Recordings** | 1. Go to **Call Logs /Voicemails / Recordings**.<br>2. Right click a desired record.<br>3. Click **Select DOD to Call**, then select a specific DOD number. |

# 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

### PBX Server

- 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.

### Simu Connect Desktop Client

- Make sure that the version of Simu Connect Desktop Client is version 1.11.7 or later.

## Procedure

1. During an active call, click **Call Notes** to open the call note panel.
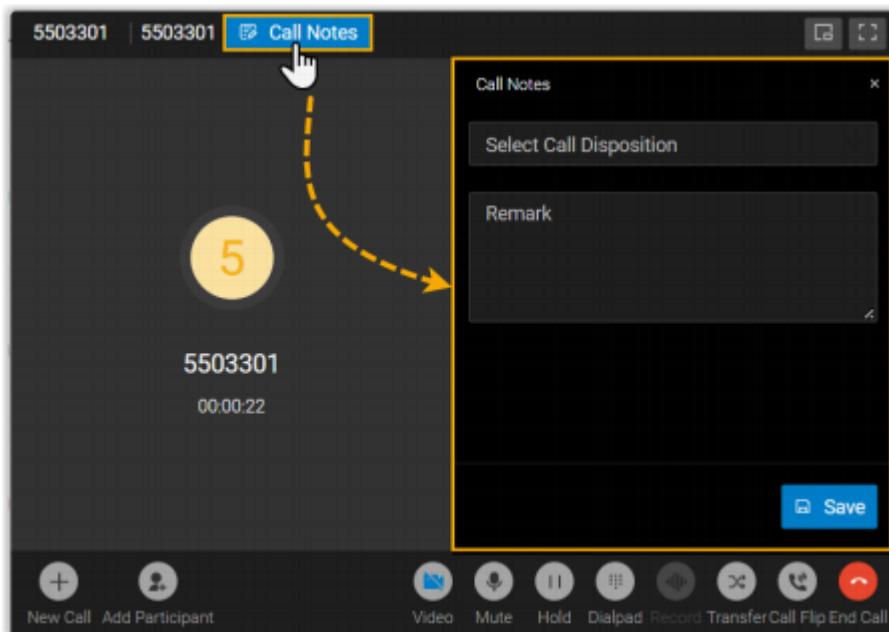
2. In the side panel, add tags and remarks for the call according to your needs.
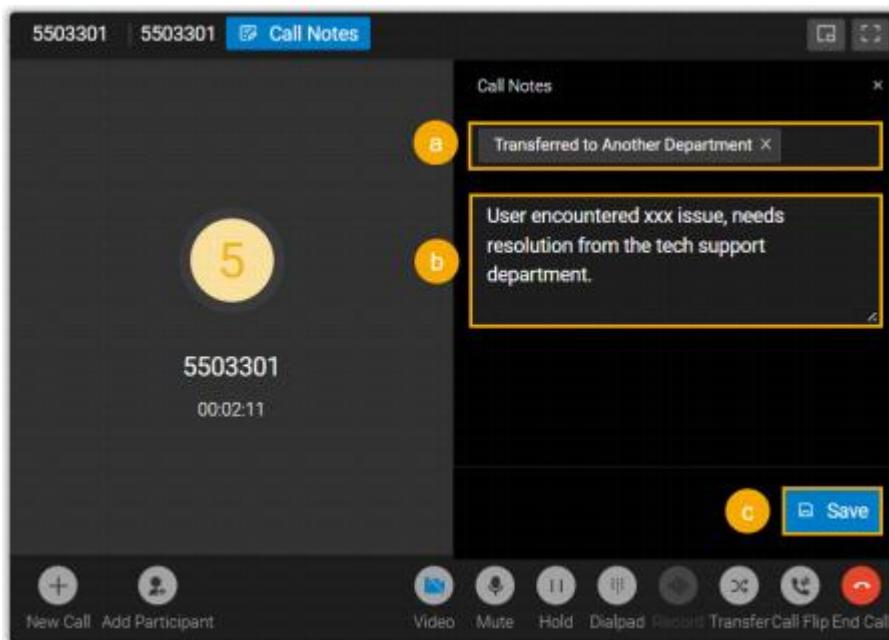


    a. In the **Select Call Disposition** drop-down list, select a disposition code.

    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.
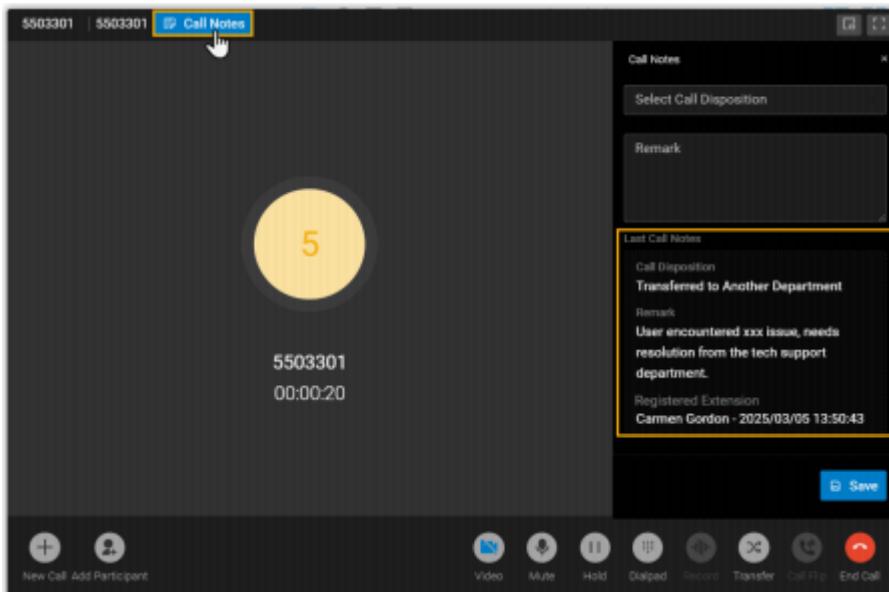


- After calls, you can review or edit the call notes you added in the corresponding call log (Path: **Call Logs**).
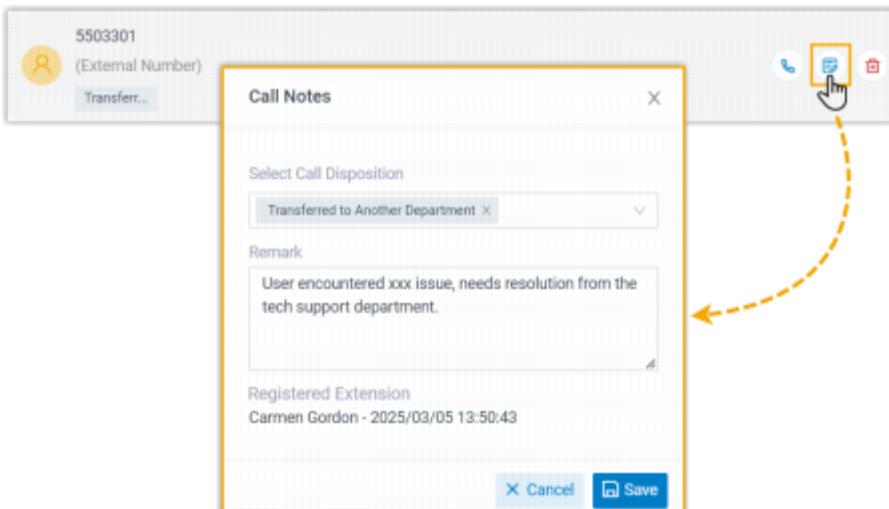
# Audio Conferencing

## 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.

### Restrictions

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

### Highlights



**Instant conference calls**

Initiate an instant audio conference during a call, without the need for leaving the current conversation or being back in the office.

**Flexibly invite members**

Invite any members you want to the audio conference, this can be colleagues or external business partners.

**Easily control meeting**

Meeting control is at your fingertips. Operations such as mute/unmute, members add/delete, and recording enable/disable are only one-click away.

## 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 Desktop Client is in **Desktop 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.
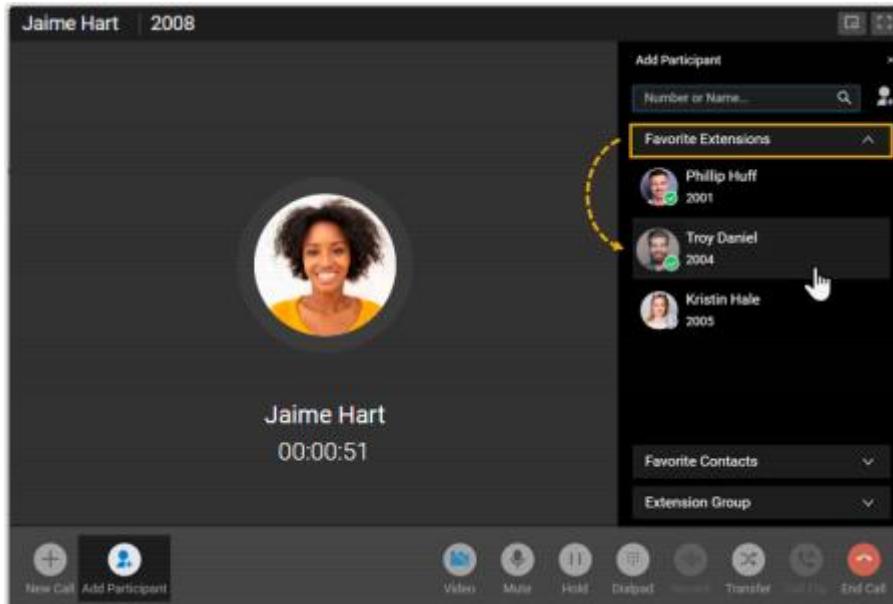


    • To directly search specific individuals, do as follow:
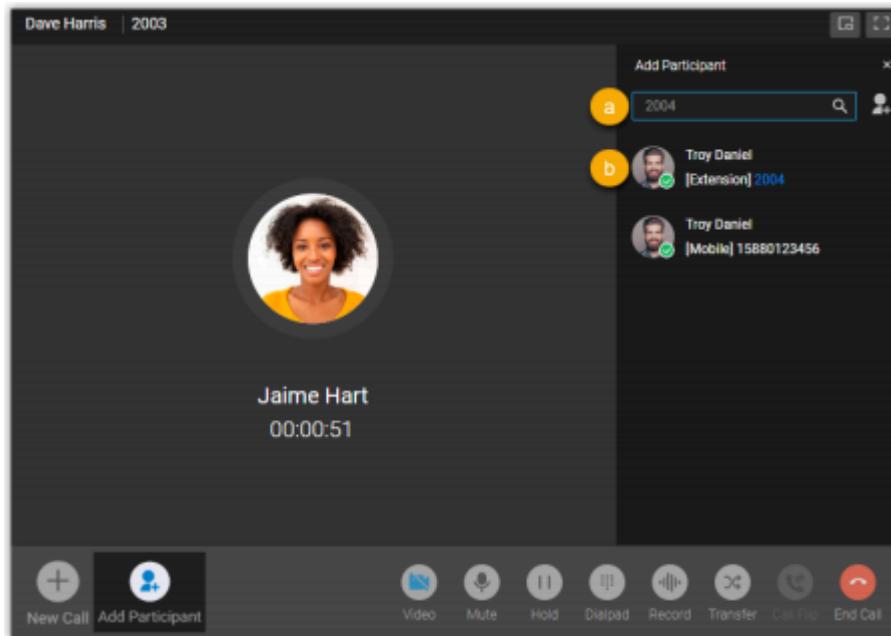
a. In the search bar, search extension users or native contacts by the supported filters, or directly invite external users by entering a phone number.

| Invitee | Supported Filters |
| --- | --- |
| Extension Users | ◦ Extension Name<br>◦ Extension Number ◦ Email Address<br>◦ Mobile Number |
| Native Contacts | ◦ Contact Name<br>◦ Company Name ◦ Email Address<br>◦ Mobile Number |
| External Users | ◦ External Number |

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.
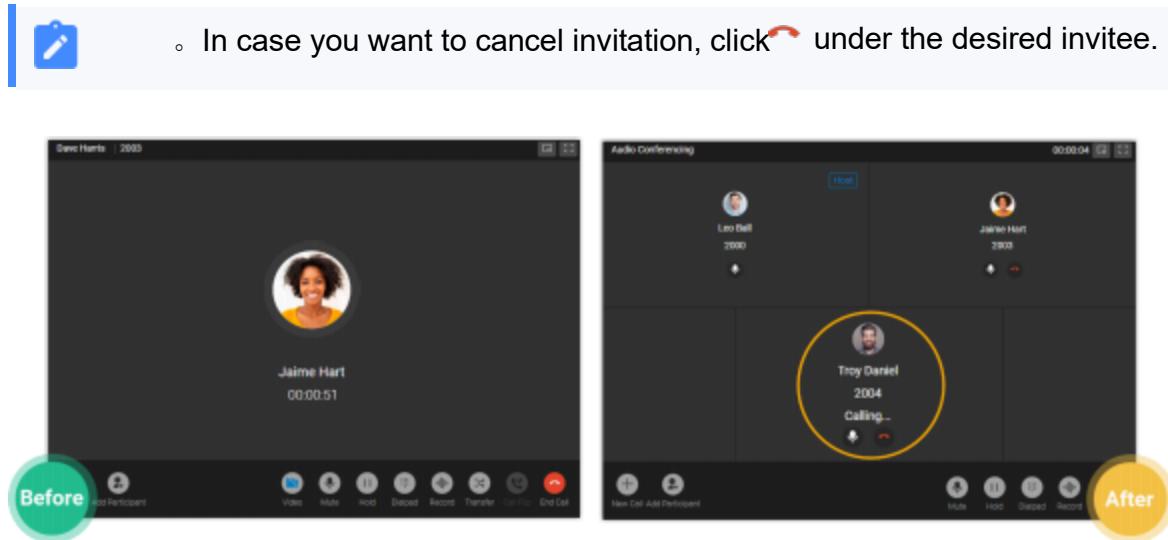


- The one who sends the call invitation first will be the conference "Host". The Host can manage the audio conference. For more information, see [Control an In-progress Audio Conference](#).
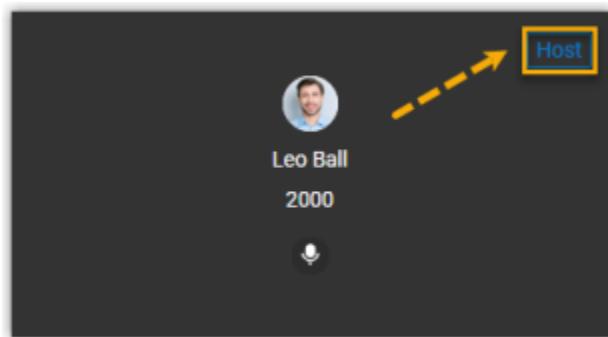


# Audio Conference Call Operations

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.

| Operation | Host | Participant |
|---|---|---|
| Turn on/Turn off one's own audio | √ | √ |
| Turn on/Turn off participants' audio | √ | × |

| Operation | Host | Participant |
|---|---|---|
| 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 Simu Connect for Google' users**.

# Control an In-progress Audio Conference

## Preview of an in-progress audio conference
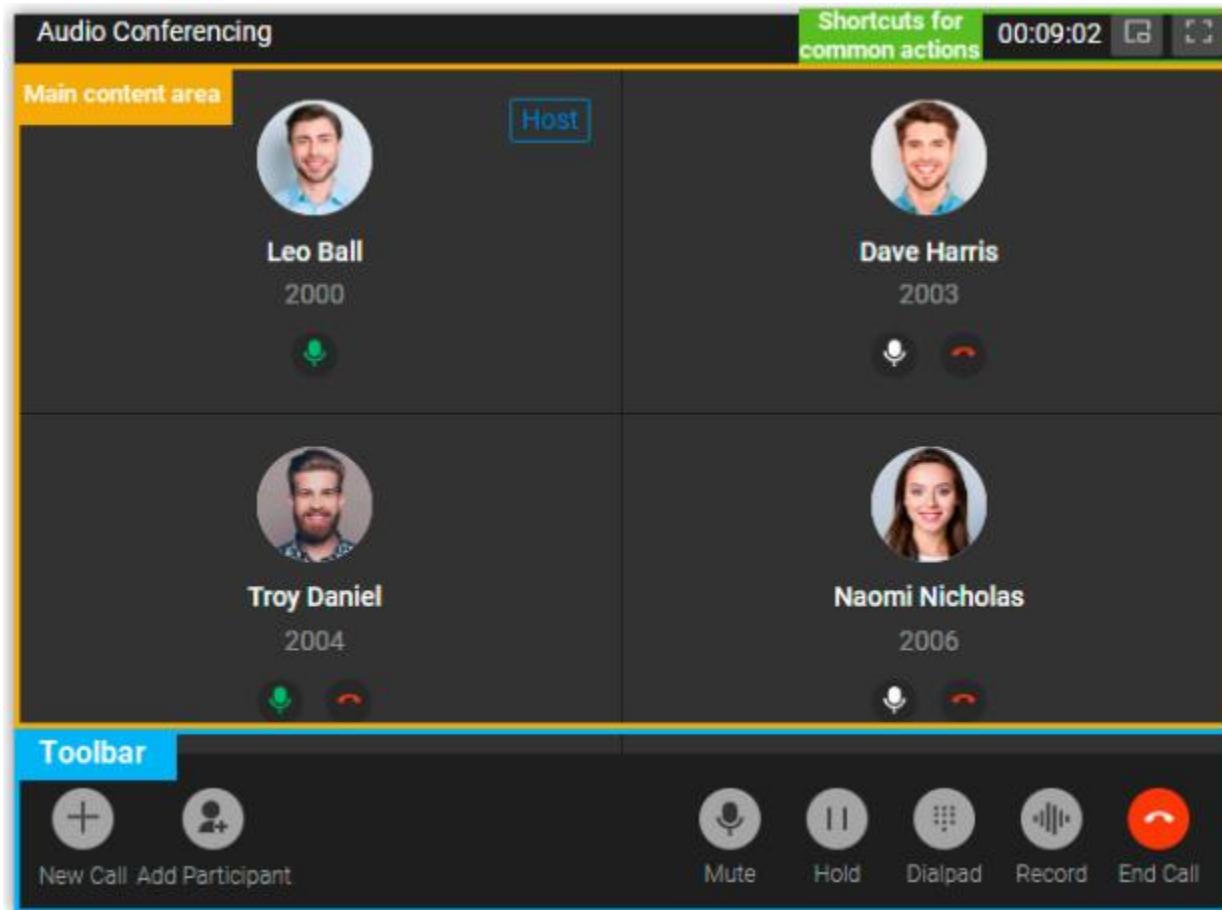


## Shortcuts for common actions

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 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.

# Call Logs

## Check and Manage Call Logs

This topic describes how to view the calls that you made, answered, or missed, and how to manage the personal call logs on Simu Connect Desktop Client.

**Procedure**

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



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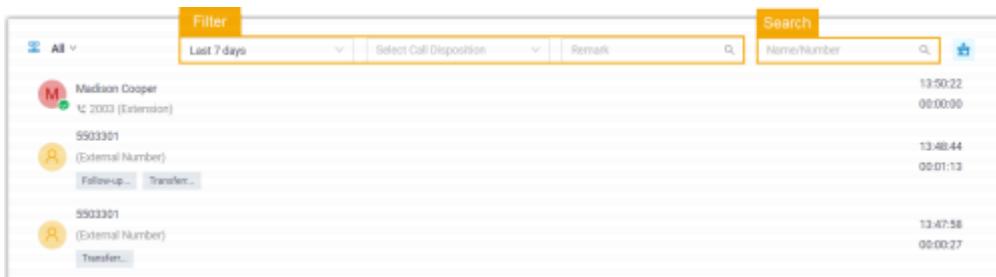


4. Manage the call logs according to your needs.

| Operation | Instruction |
| --- | --- |
| Check or edit call notes | You can check or edit call notes you've added for a call.<br>    • To check the call note, hover your mouse over the tag(s). |

| Operation | Instruction |
|---|---|
| |  • To edit the call note, do as follows:  a. Hover your mouse over the call log, then click ![edit icon] . b. In the pop-up window, edit the call note as needed, then click **Save**. |
| Place a call | You can directly place a call from a call log via the following methods: • Double click the desired call log. • Hover your mouse over the call log, then click ![call icon] .  |
| Delete a personal call log | To delete a call log, do as follows:  a. Hover your mouse over the desired call log, then click ![delete icon] . |

| Operation | Instruction |
|---|---|
| | b. In the pop-up window, click **OK**.<br><br>The personal call log is removed from Simu Connect UC Clients. |
| Clear all personal call logs | To delete all your personal call logs, do as follows:<br><br><br><br>a. Click ![icon] on the top-right corner.<br>b. In the pop-up window, click **OK**.<br><br>All your personal call logs are removed from Simu Connect UC Clients. |
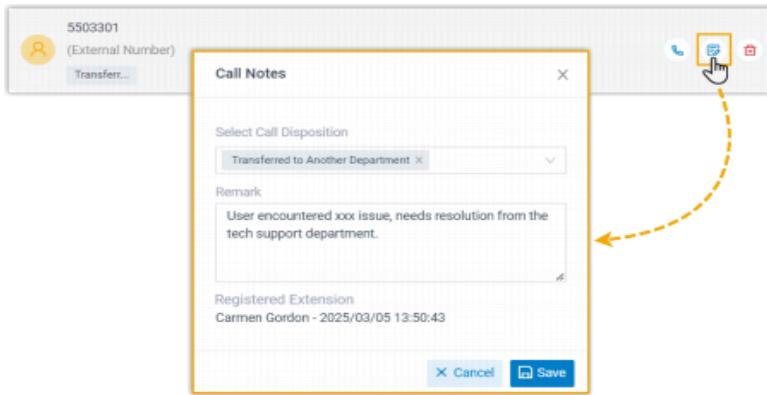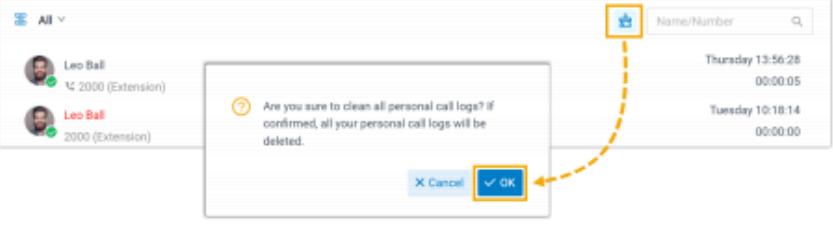
## Related information

[Manage Queue Call Logs](#)

# Voicemails

## Check and Manage Voicemails

This topic describes how to check and manage your voicemails on Simu Connect Desktop Client.

> ✏️ **Note:**
> Changes made to voicemails on Simu Connect Desktop Client will be synchronized to Simu Connect Web Client and Simu Connect Mobile Client.

**Procedure**

1. On Simu Connect Desktop Client, go to **Voicemails**.
2. **Optional:** Select specific read status to filter voicemails.
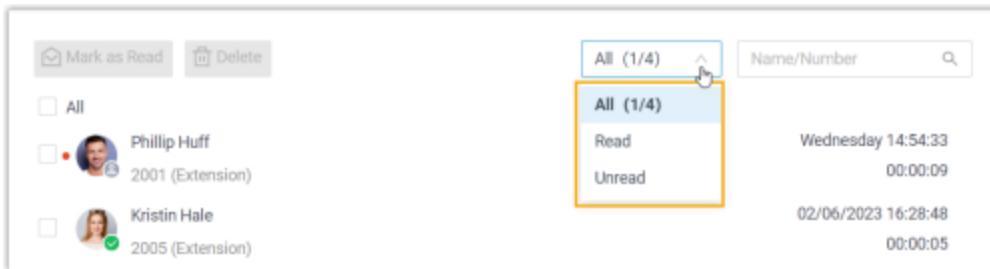


3. Check and manage the voicemails according to your needs:

| Operation | Instruction |
|---|---|
| Listen to a voicemail | a. Hover your mouse over the desired record.<br><br>b. At the right side, click ▶ .<br><br>An unread voicemail will be marked as read. |
| View a transcribed voicemail text | > ✏️ **Note:**<br>> This operation is available only if system administrator has set up voicemail transcription feature.<br><br>a. Hover your mouse over the desired record.<br><br>b. At the right side, click 🔍 . |
| Place a call | You can directly place a call from a voicemail record via the following methods: |

| Operation | Instruction |
|---|---|
|  | • Double click the desired record.<br>• Hover your mouse over the desired record, and click 📞 . |
| Download a voicemail | a. Hover your mouse over the desired record.<br>b. At the right side, click ⬇ . |
| Change the read status | • To mark a voicemail as read or unread, do as follows:<br>     a. Right click on the desired record.<br>     b. Click **Mark as Read** or **Mark as unread**.<br>• To bulk mark voicemails as read, do as follows:<br>     a. Select the checkboxes of the desired records.<br>     b. At the top menu, click **Mark as Read**. |
| Delete voicemail(s) | • To delete a voicemail, do as follows:<br>     a. Hover your mouse over the desired record.<br>     b. At the right side, click 🗑 .<br>     c. In the pop-up window, click **OK**.<br>• To bulk delete voicemails, do as follows:<br>     a. Select the checkboxes of the desired voicemails.<br>     b. At the top menu, click **Delete**.<br>     c. In the pop-up window, click **OK**. |

# Recordings

## Check and Manage Recordings

This topic describes how to check and manage your call recordings on Simu Connect Desktop Client.

> ✏️ **Note:**
> Changes made to recordings on Simu Connect Desktop Client will be synchronized to Simu Connect Web Client and Simu Connect Mobile Client.

**Requirements**

System administrator has granted you the permission to view recordings.

**Procedure**

1. On Simu Connect Desktop Client, go to **Recordings**.

Screen shoot

2. Check and manage the call recordings according to your needs.

| Operation | Instruction |
|---|---|
| Listen to a call recording | a. Hover your mouse over the desired record.<br><br>b. At the right side, click ⊙ .<br><br> |
| Place an audio call | You can directly place an audio call from a call recording record via the following methods:<br>• Double click the desired record.<br>• Hover your mouse over the desired record, then click 📞 . |

| Operation | Instruction |
|---|---|
| |  |
| Download a call recording | a. Hover your mouse over the desired record.<br><br>b. At the right side, click ⬇ .<br><br> |
| Delete call recording(s) | • To delete a call recording, do as follows:<br><br><br><br>a. Hover your mouse over the desired record.<br><br>b. At the right side, click 🗑 .<br><br>c. In the pop-up window, click **OK**.<br>• To bulk delete call recordings, do as follows: |

| Operation | Instruction |
|---|---|
|  | <br><br>a. Select the checkboxes of the desired call recordings.<br>b. At the top menu, click **Delete**.<br>c. In the pop-up window, click **OK**. |
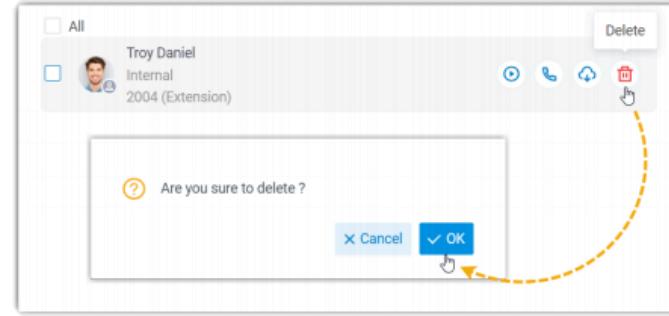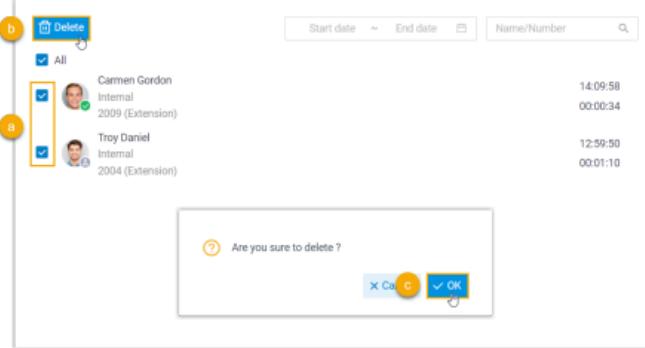
# Upgrade

## Upgrade Simu Connect Desktop Client

When a new version is released, Simu Connect Desktop Client will show a pop-up window, where you can find out what's new in the latest version. You can upgrade to the new version immediately or later. If you choose to upgrade later, follow the instructions in this topic to upgrade Simu Connect Desktop Client anytime you want.

1. Access the menu of Simu Connect Desktop Client based on your operating system.

   - **For Windows**: On the system tray, right click  .

     Screen shoot

   - **For macOS**: On the App menu, click **Simu Connect Desktop Client**.

     Screen shoot

2. Select **About** from the menu.
3. In the pop-up window, click **Check for updates**.

   A window pops up to show you what's new in the latest version.

Screen shoot

4. Click **Update Now**.

The new installation package is downloaded.
5. Install the installation package.

When the installation is completed, Simu Connect Desktop Client is upgraded successfully.

# Bug Reporting

## Report Simu Connect Problems

If you encounter problems with your Simu Connect Desktop Client, you can download Simu Connect debug logs and send the logs to Cloud One support for analysis.

1. Download Simu Connect debug logs.
   a. Access the menu of Simu Connect Desktop Client based on your operating system.

   • **For Windows**: On the system tray, right click  .

   Screen shoot

   • **For macOS**: On the App menu, click **Simu Connect Desktop Client**.

   Screen shoot

   b. Select **Download Logs** from the menu, then save the log file to your computer.
2. Submit a ticket to report the problem to Cloud One Support, and provide the debug logs.

# Extension Preferences

## User

### Update Your Extension Profile

This topic describes how to upload profile image and configure account information.

**Procedure**

1. Log in to Simu Connect Desktop Client, go to **Preferences > User > User Information**.

2. Click  to upload your profile image.

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

3. Configure your account information as needed.

- **First Name**
- **Last Name**
- **Email Address**: You can receive voicemail messages and notifications for missed calls and password changes via the email address.
- **Mobile Number**: You can receive calls via 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

Outbound Caller ID is the number and name that displayed on the callees' phone when you make outbound calls via specific trunks. This topic describes how to view Outbound Caller ID.

**Scenario**

You are a technical support, and use the trunk "Outbound_US" to contact your customers. Your system administrator can set up a specific Outbound Caller ID Number (eg. 0592-5503301) and a specific Outbound Caller ID Name (eg. Cloud One Support) for this trunk.

In this way, when you contact your customers via the trunk "Outbound_US", the callees' phone will display "Cloud One Support <0592-5503301>", so that they can verify the identity of the caller.

### Procedure

1. Log in to Simu Connect Desktop 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.

| 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 a corded IP desk phone.

### Procedure

1. Log in to Simu Connect Desktop Client.

2. Go to **Preferences > User > Outbound Caller ID (DOD) > Emergency Outbound Caller ID**.

**Outbound Caller ID (DOD)**

Emergency Outbound Caller ID

608522256
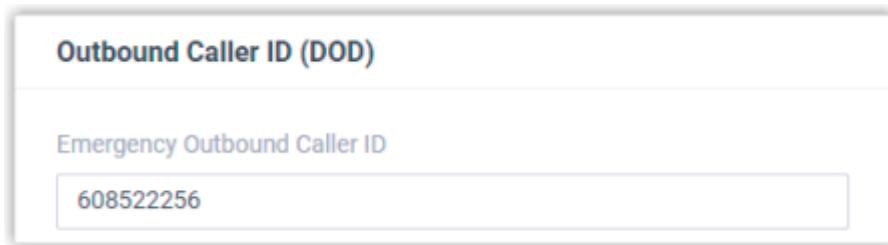
## Result

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

# Presence

## Configure Presence Settings

Simu Connect provides different presence statuses to let your colleagues know if you are currently available. This topic introduces the types of presence statuses and the presence settings. Simu Connect provides the following presence statuses.

- ✅ Available
- 🕐 Away
- ✈️ Business Trip
- ⛔ Do Not Disturb
- ⬆️ Lunch Break

- ℮ Off Work

You can go to **Preferences > Presence**, select a presence status and configure the following settings differently. When your presence status changes, the presence settings will change accordingly.

## Presence Information

| 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.

| Setting | Description |
|---|---|
| Types of incoming calls | Select a call type.<br><br>• **Internal Calls**: Set a call forwarding rule for incoming calls from your colleagues.<br>• **External Calls**: Set a call forwarding rule for incoming calls from external users. |
| Forwarding condition | Turn on the switch of a forwarding condition, then configure a destination.<br><br>**Note:**<br>  **Do Not Disturb** presence only supports the option**Always**.<br><br>• **Always**: Forward all incoming calls to the designated destination.<br>• **No Answer**: Only forward unanswered calls to the designated destination.<br>• **When Busy**: Only forward the calls that come in while you are talking on the phone to the designated destination. |

## Ring Strategy

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

**Note:**
  **Do Not Disturb** presence does not support this setting.

- **Extension Endpoint**: The IP phone, analog 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)

| Setting | Description |
|---|---|
| Ring First | Set which endpoint(s) will ring first when a call reaches your extension. |
| Ring Secondly | Set which endpoint(s) will ring if the incoming call is not answered on the endpoints that are selected as **Ring First**. |

## 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**.

> **Note:**
> **Do Not Disturb** presence does not support this setting.

| Setting | Description |
|---|---|
| Ring Timeout(s) | Set the timeout period.<br><br>> **Note:**<br>> The valid range is from 5 to 300 seconds. |

## 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:**
> **Do Not Disturb** presence does not support this setting.

| Setting | Description |
|---|---|
| Ring Mobile Number Simultaneously | Check the option to enable this feature.<br><br>> **Tip:**<br>> Click 🖉 to configure your mobile number. |

| Setting | Description |
|---|---|
| Prefix | Enter the prefix of outbound route so that PBX server can successfully send calls out.<br><br>**Note:**<br>Contact system administrator to check if a prefix is required. |

## 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.

| Setting | Description |
|---|---|
| Accept Push Notifications | 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 the 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.

| Setting | Description |
|---|---|
| Log In | Log in to a queue.<br><br>**Note:**<br>The option is available ONLY in `Available` status. |
| Log Out | Log out of a queue. |
| Pause | Pause receiving queue calls, and select a specific pause reason as needed. |

| Setting | Description |
|---------|-------------|
| Do Nothing | Retain current status. |

**Related information**

Manually Switch Presence Status
Automatically Switch Presence Status Based on Business Hours and Holidays

# Manually Switch Presence Status

This topic describes how to manually switch your current presence status to a new one, including fixed status and temporary status.

## Switch presence status to a fixed status

1. Log in to Simu Connect Desktop Client.
2. In the top pane, select a presence status from the drop-down list of presence.
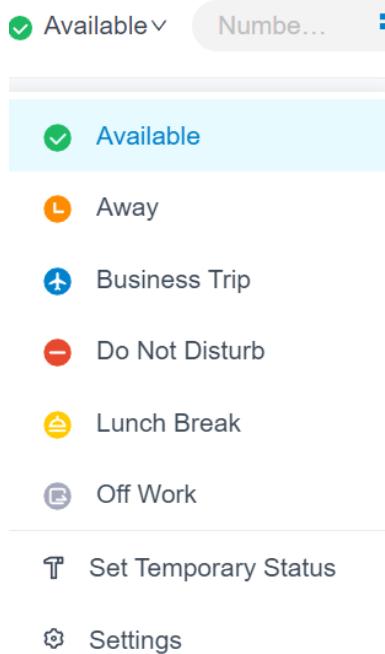


The presence status and the relevant presence settings take effect.

## Switch presence status 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 status, you can switch presence to a temporary status, and set how long the status will last.

1. Log in to Simu Connect Desktop Client.
2. In the top pane, select **Set Temporary Status** from the drop-down list of presence.

Set Temporary Status        ✕

> Select a temporary status for a specific duration. Your status will automatically switch back to its current state when this time is up.

**\* Change Status To:**

Away    ⌄

**\* Time:**

Duration    ⌄

**\* Hour:**          **\* Minute:**

01    ⌄      00    ⌄

**Set Status Message**

[                                                  ]

     ✕ Cancel    💾 Save

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 note to the temporary status.
4. Click **Save**.
   The presence status and the relevant presence settings take effect.

> ⓘ **Tip:**
> In the top pane, you can hover your mouse over the presence to check when will the temporary status ends. When the time is up, presence status and relevant settings would be switched back to the previous one.

**Related information**

# Automatically Switch Presence Status Based on Business Hours and Holidays

You can configure different presence status based on business hours and holidays. In this way, the extension presence will automatically switch to the preset status based on the

time.

## Requirement

System administrator has set up business hours and holidays.

**Procedure**

1. Log in to Simu Connect Desktop Client, go to **Preferences > Features**.
2. In the **Time-conditional Presence Auto Switch** section, specify a presence status to be displayed for the desired time.
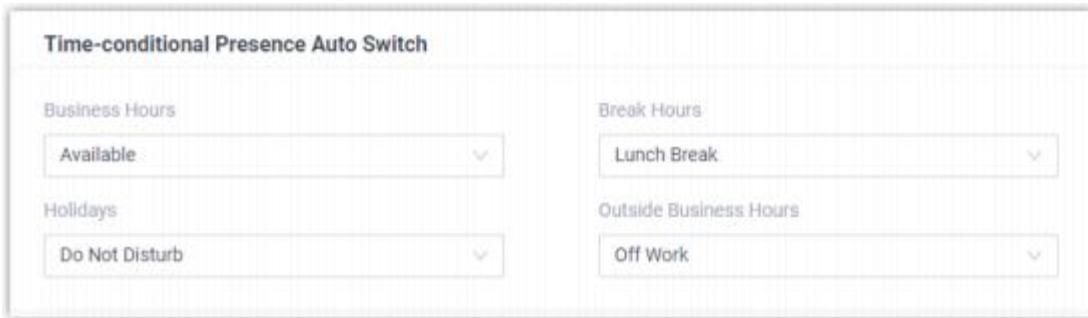


3. Click **Save**.

**Result**

Presence status will be switched automatically according to the business hours and holidays.

For example, the system administrator has set the Break Hours as 12:00-14:00, and you have selected **Lunch Break** for Break Hours. Then Simu Connect will automatically switch your presence status to **Lunch Break** during 12:00-14:00.

**Related information**

Manually Switch Presence Status

# Voicemail

## Customize Your Voicemail Settings

This topic describes how to customize your voicemail settings, including voicemail access PIN, new voicemail notification, voicemail play options, and voicemail greetings.

**Procedure**

1. Log in to Simu Connect Desktop Client, go to **Preferences > Voicemail**.
2. Turn on the option **Enable Voicemail**.

3. In the **Voicemail PIN Authentication** drop-down list, decide whether a PIN is required when you access voicemail.
   - **Enabled**: You need to enter a PIN to access your voicemail messages. You can set the PIN number in the **Voicemail Access PIN** field.
   - **Disabled**: You can access your voicemail messages directly.
4. 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.

5. In the **New Voicemail Notification** drop-down list, decide whether to receive email notification for new voicemails.
   - To disable email notifications, select **Do Not Send Email Notifications**.
   - To enable email notifications, select one of the following options:
     - **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 notification emails only.
6. 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.<br>    • **Mark as Read**: Mark the voicemail message in mailbox as read.<br>    • **Delete Voicemail**: Delete the voicemail messages from mailbox.<br>    • **Do Nothing**: Keep the voicemail message in mailbox as unread. |
| Send to | Specify the email address for receiving notification emails.<br>    • **User Email**: Send notification emails to your email address. • **Custom Email**: Send notification emails to a custom email address. |

| Setting | Description |
|---------|-------------|
|  | Enter the desired email address in the **Custom Email Address** field. |

7. **Optional:** Set whether to play the following messages when 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.
8. In the **Voicemail Greeting** section, decide which greeting will be played to callers when they reach your mailbox.

   By default, the system greeting is your default greeting, you can upload or record custom voicemail greetings and set it as the new default greeting.



> **Note:**
> If you want to play specific greetings based on your presence status, select an existing one from the corresponding drop-down list.
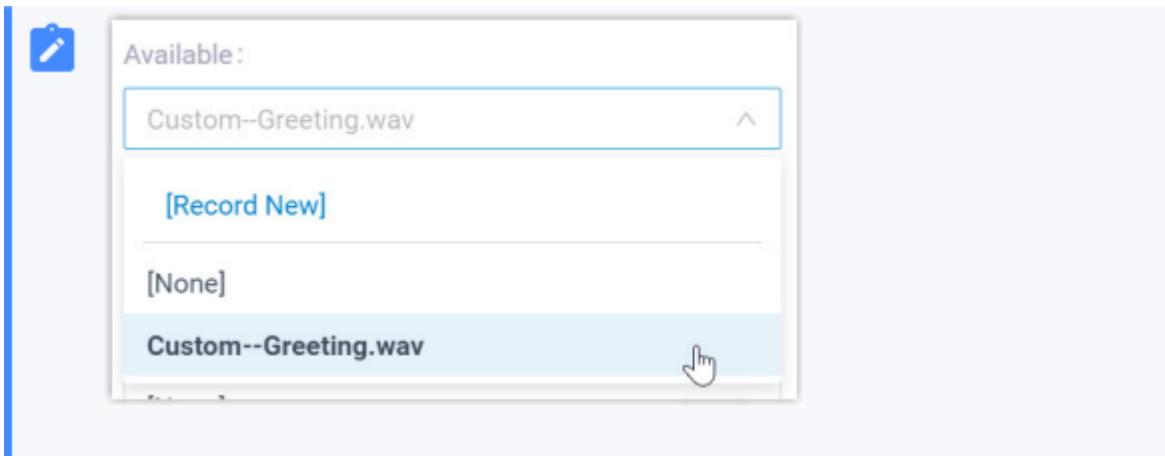
9. Click **Save**.

# Upload or Record Voicemail Greetings

Voicemail greetings are played to callers when they reach your mailbox. This topic describes how to upload or record your personal voicemail greetings.

## Restrictions

Up to 10 custom voicemail greetings are supported.

## Upload a voicemail greeting

### Prerequisites

Prepare an audio file, 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 8 MB

### Procedure

1. Log in to Simu Connect Desktop 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.

**Result**

• The uploaded greeting is displayed in the **Greeting Management** tab.
• You can set this greeting as the default greeting or the presence greeting by selecting it from the corresponding drop-down list.



Figure 7. **Set as the default greeting**
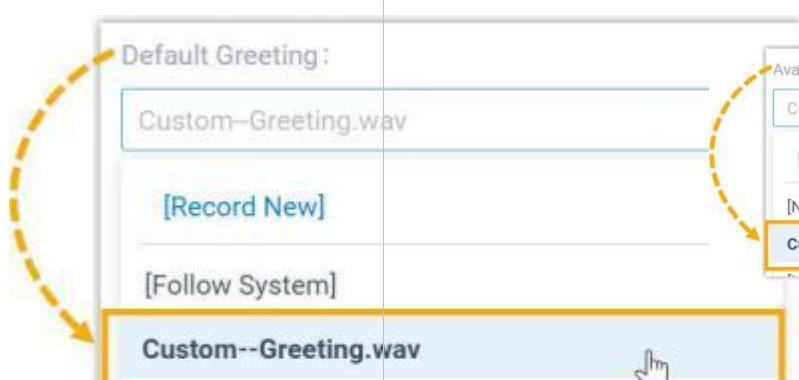
Figure 8. **Set as the presence greeting**
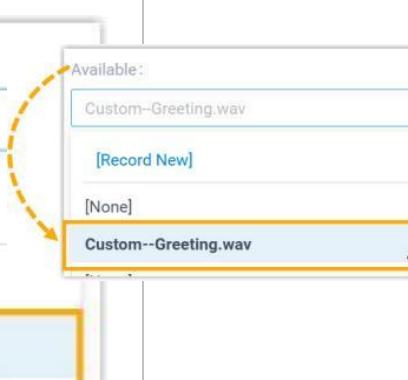
# Record a voicemail greeting

**Procedure**

1. Log in to Simu Connect Desktop Client, go to **Preferences > Voicemail**.
2. In the **Voicemail Greeting** section, click **Greeting Management**.
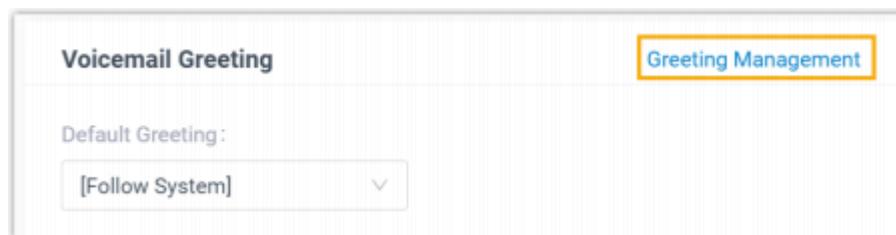
3. In the pop-up window, click **Record New Greeting** tab, and configure the
   following settings:
   a. In the **Audio File Name** field, enter a name to help you identify it.
   b. In the **Extension** drop-down list, select your extension to record a
      greeting.
   c. Click **Confirm**.

      The system places a call to your extension.
4. Answer the call, then record your greeting, and hang up after you finish
   recording.

**Result**

• The recorded greeting is displayed in the **Greeting Management** tab.
• You can set this greeting as the default greeting or the presence
greeting by selecting it from the corresponding drop-down list.

| Figure 9. **Set as the default greeting** | Figure 10. **Set as the presence greeting** |
|---|---|
| Default Greeting: <br> Custom—Greeting.wav ∧ <br> [Record New] <br> [Follow System] <br> Custom--Greeting.wav | Available: <br> Custom--Greeting.wav <br> [Record New] <br> [None] <br> Custom--Greeting.wav |
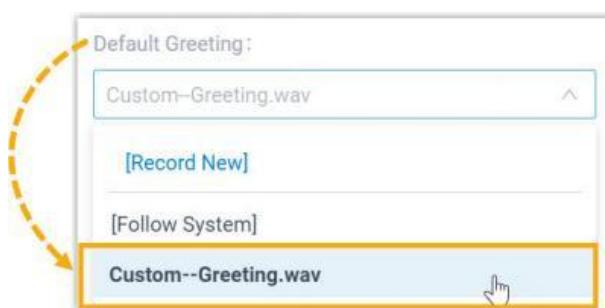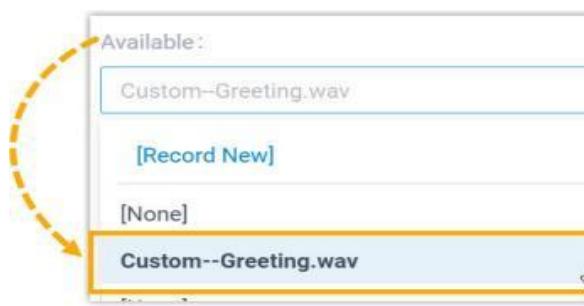
# Manage Personal Voicemail Greetings

This topic describes how to manage your voicemail greeting, including playing, downloading,
and deleting greetings.

## Play a voicemail greeting

1. Log in to Simu Connect Desktop 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 Simu Connect Desktop Client 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 voicemail greeting

1. Log in to Simu Connect Desktop 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 voicemail greetings

1. Log in to Simu Connect Desktop Client, go to **Preferences > Voicemail**.
2. In the **Voicemail Greeting** section, click **Greeting Management**.
3. Delete one or more greetings according to your needs.

- To delete a greeting, click  beside the greeting and click **OK**.
- To delete greetings in bulk, select the desired greetings and click **Delete**, then click **OK**.

# Audio and Video

## Configure Audio and Video Devices

This topic describes how to select the desired audio device and video device for your Simu Connect Desktop Client.

### Prerequisites

Simu Connect Desktop Client is in **Desktop Client** mode.
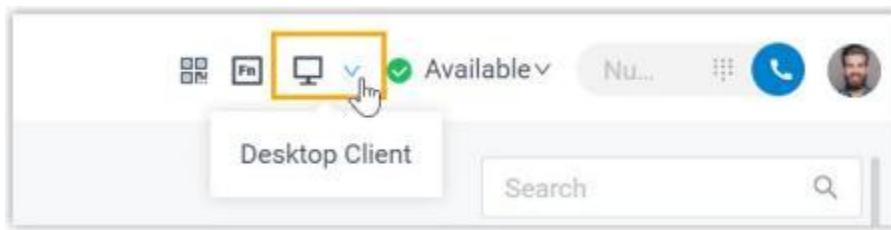
## Procedure

1. Log in to Simu Connect Desktop Client, go to **Preferences > Audio &Video**.
2. In the **Multimedia Device** section, select desired device from the drop-down list of **Camera**, **Microphone**, **Speaker**, and **Ringing Device**.

   > ⚠ **Important:**
   > Video device requires the subscription to Ultimate Plan (UP) of your organization's server.
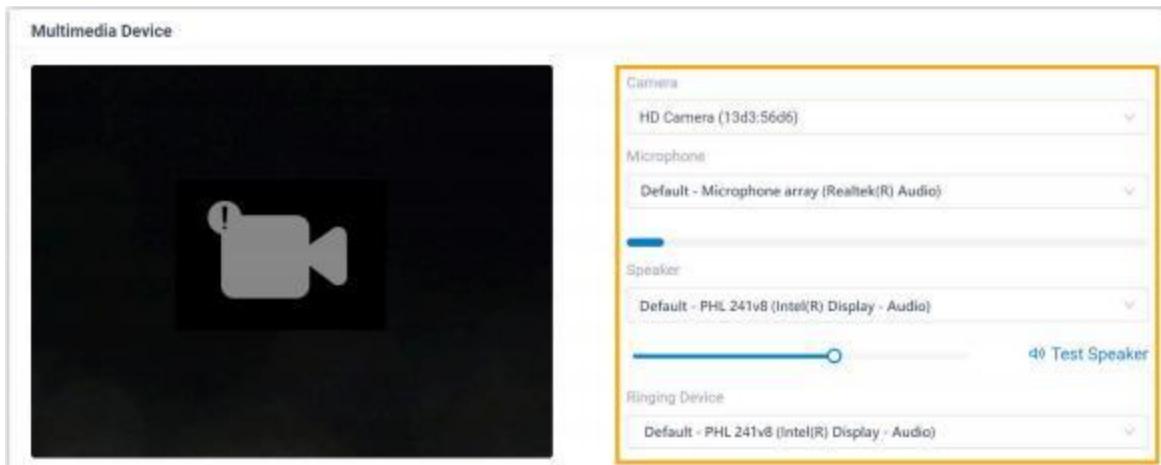


3. If you have a headset compatible with Simu Connect Desktop Client, you can set up the head- set to work with Simu Connect Desktop Client in the **Headset Integration** section. In this way, you can control Simu Connect calls directly from the headset.

   For the compatible headsets and the integration instructions, see Integrate HID-compliant Headsets with Simu Connect Desktop Client.

4. Click **Save**.

# Integrate HID-compliant Headsets with Simu Connect Desktop Client

If you have a **HID-compliant headset** on hand, you can set up the HID-compliant headset as the audio device for Simu Connect Desktop Client, so as to control Simu Connect calls via the headset.

## Supported headset types

All HID-compatible headsets (connected via USB or Bluetooth transmitter) are supported.

> **Note:**
> Headsets from **Jabra**, **Yealink**, **EPOS**, **Poly** have been verified to work properly. Headsets from other brands may be subject to limitations.

## Procedure

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

   b. At the toolbar, check if 🖥 is displayed.
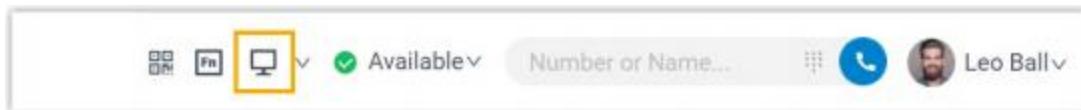
   

   If not, select **Desktop Client** from the drop-down list.
2. Connect the HID-compliant headset to the USB port of your computer.
3. Go to **Preferences > Audio &Video > Headset Integration**, set the headset as the audio device.
   a. In the drop-down list, select the connected HID-compliant headset.
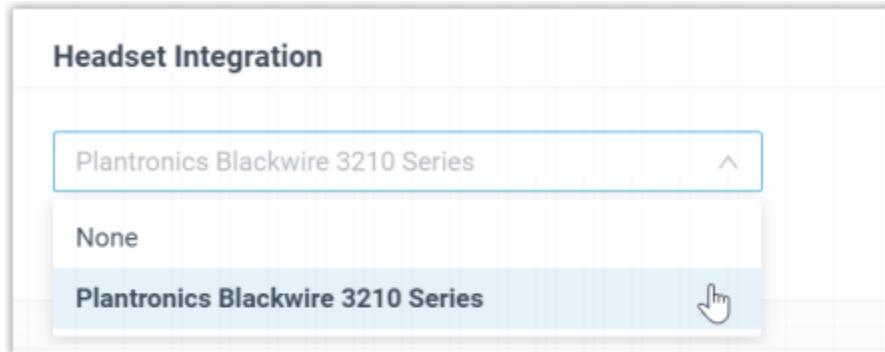
   

   b. Click **Connect Headset**.
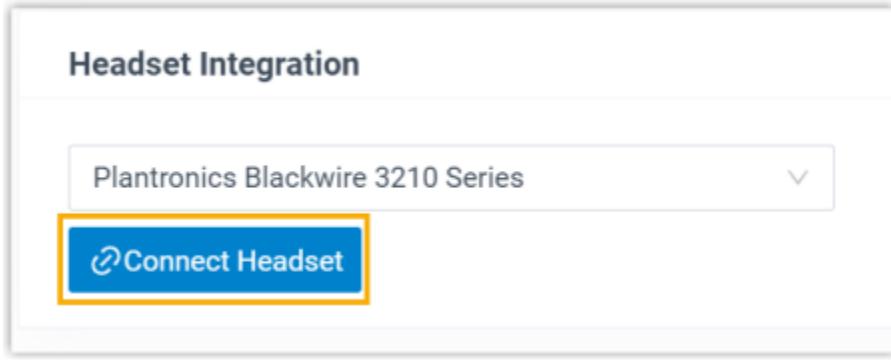
4. Click **Save**.

## 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

**Tip:**
In case you want to change the connected headset, select another connected HID- compliant headset and click **Connect Headset**.
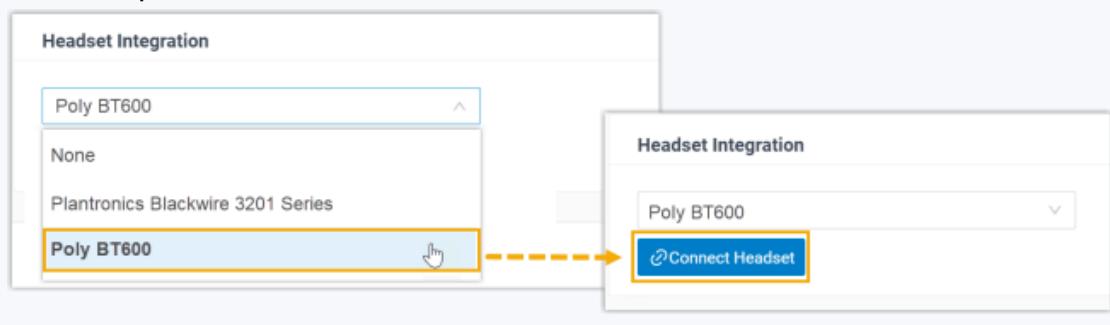
# Email Notification

## Enable Email Notifications for Missed Calls and Password Changes

This topic describes how to enable email notifications for missed calls and password changes.

**Procedure**

1. Log in to Simu Connect Desktop Client, go to **Preferences > Features**.
2. In the **Notifications** section, select the desired checkbox to decide which notifications you want to receive.
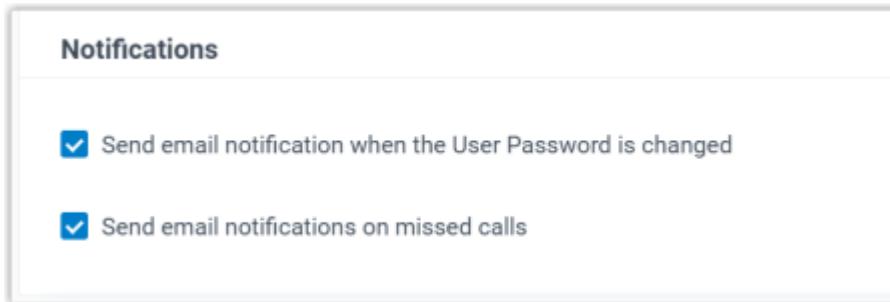


3. Click **Save**.

**Result**

When the corresponding event occurs, the system will send relevant notifications to your email address.

# Call

## Handle Incoming Calls Based on 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 Desktop Client, go to **Preferences > Features > Call Handling Based on Caller ID**.
2. Click **Add** to set up a call handling rule.
   a. 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](#).
   b. 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.

   c. Click **Confirm**.
3. **Optional:** To add more rules, repeat **step 2**.
4. **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.

5. Click **Save**.

## Result

The call handling rules take effect immediately. When an incoming call reaches your extension, PBX will handle the call based on Caller ID accordingly.

# 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 Desktop Client, go to **Preferences > Features**.
2. In the **Call** section, select the checkbox of **All Reject Mode for Endpoints**.
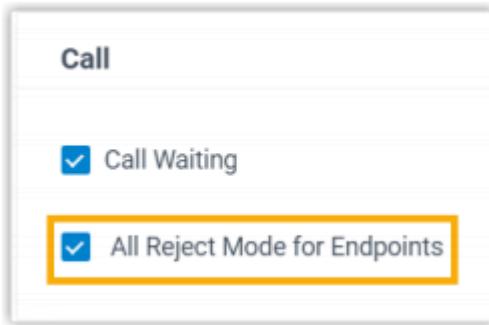


3. Click **Save**.

## 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 version of Simu Connect Desktop Client is 1.8.3 or later.

### Procedure

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

> **Call**
>
> ☑ Call Waiting
>
> ☐ All Reject Mode for Endpoints
>
> ☑ Auto Answer
>
>     ＊ Auto Answer Delay Time (s)
>
>     | 0 |
>
>     ☑ Play Auto Answer Tone
>
> ☐ Auto Answer Paging/Intercom Call

> 🖫 Save    ✕ Cancel

- **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. This topic describes how to enable auto-answer for paging/intercom calls.

### Requirements

The version of Simu Connect Desktop Client is 1.8.3 or later.

### Procedure

1. Log in to Simu Connect Desktop 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.

☑ Auto Answer Paging/Intercom Call

☐ Paging/Intercom Calls Barge In

☑ Play Auto Answer Tone

- **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/inter-com call will be routed to the "When Busy" destination.

# Call Popup

## Automatically Open Contact URL on Incoming Calls

Cloud One 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
- **Simu Connect Desktop Client**: Version 1.10.2 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 Desktop 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.

| Setting | Description |
|---|---|
| Popup URL | Enter the third-party URL, followed by the variables that you want to pass.<br><br>**Supported variables**:<br>• *. {{ .CallerNumber}}*: Incoming Caller ID.<br>• *. {{ .CallerDisplayName}}*: Incoming Caller ID Name. Take Solve360 CRM as an example: https://web/solve.360.com/{{.CallerNumber}}&{{.CallerDisplayName}} |
| Communication Type | Select which types of calls will trigger the call popup.<br><br>• **Inbound**: Inbound calls from external users.<br>• **Internal**: Internal calls from colleagues. |
| Trigger Event | Set when the call popup will be automatically triggered.<br><br>• **Ringing**: An incoming call reaches.<br>• **Answered**: An incoming call is answered.<br>• **Call End**: An incoming call is ended. |

4. Click **Save**.

## Result

When your extension receives an incoming 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 your browser, or the pop-up screen can NOT be opened automatically.
>
> 

# Automatically Launch External Applications on Incoming Calls

Cloud One Simu Connect Desktop Client supports to integrate third-party applications to achieve call popup by launching executable application. When your extension receives a call, Simu Connect Desktop Client will automatically launch the specified external application, and transfer the incoming call information.

## Requirements

- **PBX server**: Version 84.18.0.59 or later.
- **Simu Connect Desktop Client**: Version 1.10.2 or later
- **External Application**: The desired application(s) have already been installed on your local computer.

## Procedure

1. Log in to Simu Connect Desktop Client, go to **Preferences > Features > Call Popup**.
2. Select the checkbox of **Launch External Application**.
3. Click **Add** to add a trigger rule, then complete the following settings.

   > 📝 **Note:**
   > A maximum of **3** trigger rules are supported.

| Setting | Description |
|---|---|
| Trigger Event | Set when the external application will be automatically launched.<br><br>• **Ringing**: An incoming call reaches.<br>• **Answered**: An incoming call is answered.<br>• **Call End**: An incoming call is ended. |
| Parameters to Send | Enter the parameters that will be sent to the specified application.<br>**Supported variables**:<br>• *. {{ .CallerNumber}}*: Incoming Caller ID.<br>• *. {{ .CallerDisplayName}}*: Incoming Caller ID Name. |
| Path to Application Executable | Enter the file path where the application is installed on the local computer or click **Browse** to select the desired application.<br><br>For example, enter `D:\Download\MicroCRM\MicroCRM.exe`. |

4. Click **Save**.

## Result

When your extension receives a call, the external application is automatically launched based on the specified call-related events.

# Function Key

## 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 Desktop 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 |
|---|---|
| **Simu Connect Desktop Client** | 120 |
| **Simu Connect Web Client** | |
| **Cloud One Simu Connect for Google** | |
| **IP phones** that support Auto Provisioning | Depend on how many line keys your phone supports. |

## Procedure

1. Log in to Simu Connect Desktop 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.



   - **Type**: Select a key type.

     > **Tip:**
     > For the supported key types, see the table.

   - **Value**: Configure a desired value based on the key type.
   - **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 回 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.
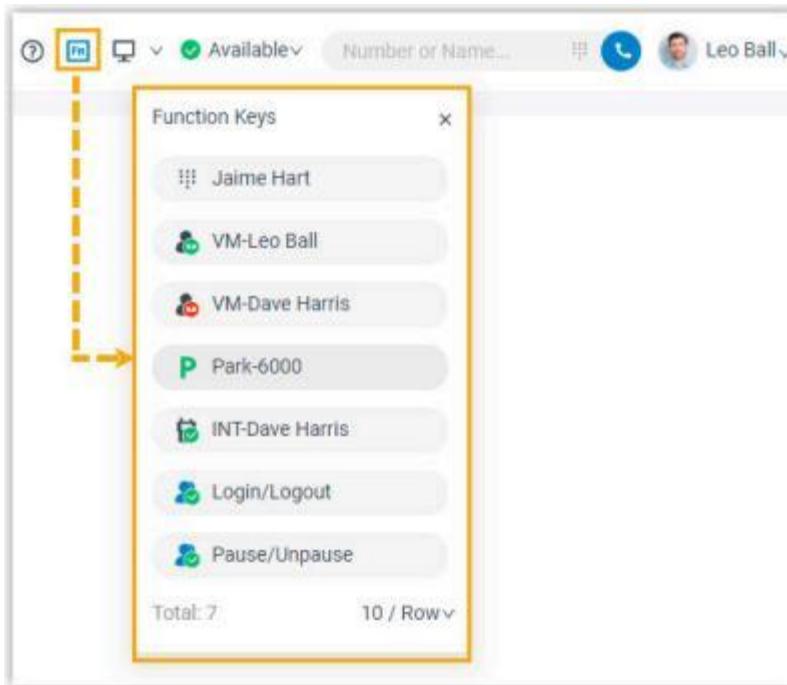
• If you have registered your extension on an IP phone via Auto Provisioning, the
phone also automatically applies the changes.

> 📝 **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. | • O: The function key provides no functionality until configuration. |

| Key Type | Function | Icon & Description |
|---|---|---|
| Line | Configure line keys for IP phone. | • ⇅ : The key type **Line** is only available for IP phones. |
| BLF | Monitor the status of a specific extension. | • : The monitored extension is unregistered.<br><br>• : The monitored extension is online and ready for communication.<br><br>• : The monitored extension is away from desk.<br><br>• : The monitored extension doesn't want to be disturbed, and won't receive any calls.<br><br>• : The monitored extension is currently on lunch break.<br><br>• : The monitored extension is on a business trip.<br><br>• : The monitored extension is currently off work.<br><br>• : The monitored extension receives a call.<br><br>**ⓘ Tip:**<br>To pick up the incoming call to the extension on Simu Connect Desktop Client, hover your mouse over the function key, then click the desired incoming call.<br><br>👤 Dave Harris<br><br>Caller<br><br>Troy Daniel<br>5557<br><br>• : The monitored extension is in a call.<br><br>• : The monitored extension is held in a call.<br><br>**✎ Note:** |

| Key Type | Function | Icon & Description |
|---|---|---|
| | | ✏️ The function key doesn't work in an audio conference call. |
| Speed Dial | Speed dial a number. | • ⠿ : Click the icon to place a call to the most commonly dialed numbers or extensions. |
| Check Voicemail | • Monitor the status of voicemail.<br>• Check voicemail messages. | • 👤 : The monitored extension is deleted.<br><br>• 👥 : All the voicemails of the monitored extension are read.<br><br>• 👤 : There are unread voicemails for the monitored extension.<br><br>ℹ️ **Tip:**<br>To check the voicemail messages on Simu Connect Desktop Client, click the icon, then enter the voicemail PIN code as prompts. |
| Check Group Voicemail | • Monitor the status of group voicemail in shared mode.<br>• Check group voicemail messages. | • 👥 : The monitored group voicemail is deleted.<br><br>• 👥 : All the voicemails of the monitored group voicemail are read.<br><br>• 👥 : There are unread voicemails for the monitored group voicemail.<br><br>ℹ️ **Tip:**<br>To check the group voicemail messages on Simu Connect Desktop Client, click the icon, then enter the group voicemail PIN code as prompts. |
| Park & Retrieve | • Monitor the status of a specific parking number.<br>• Park a call on a specific parking number.<br>• Retrieve a parked call from a specific parking number. | • P : The parking number is invalid.<br><br>• P : The parking number is available.<br><br>ℹ️ **Tip:**<br>You can click the icon to park the current call on the parking number.<br><br>• P : The parking number is occupied. |

| Key Type | Function | Icon & Description |
|---|---|---|
| | | **Tip:** You can click the icon to retrieve the call. |
| | | **Note:** The function key doesn't work in an audio conference call. |
| Intercom | • Monitor the status of a specific extension. <br> • Place an intercom call to the monitored extension to make an announcement. | • : The monitored extension is unregistered. <br> • : The monitored extension is available. <br> • : The monitored extension receives a call. <br> • : The monitored extension is in a call. |
| DTMF | Send DTMF signals directly instead of manually entering the numbers each time. | • : During a call, click the icon to send DTMF signals. <br><br> **Note:** The function key doesn't work in an audio conference call. |
| Agent Login/Logout | • Monitor login status in a specific queue. <br> • Log in to or log out of a specific queue. | • : Not a member in a specific queue. <br> • : Log in to a specific queue. <br> • : Log out of a specific queue. |
| Agent Pause/Unpause | • Monitor service status in a specific queue. <br> • Pause or unpause receiving a call from a specific queue. | • : Resume service in a queue. <br> • : Pause service in a queue. <br> • : Not a member in a specific queue. <br> • : Not logged in to a specific queue. |
| LDAP Directory | Quickly access the LDAP phonebook to query contact information on IP phones. | • : The key type **LDAP Directory** is only available for IP phones. |
| Boss-Secretary Feature | Monitor the call status of your boss or secretary. | • As a boss, you can monitor your secretary's call status: |

| Key Type | Function | Icon & Description |
|---|---|---|
| | | ○  : The secretary is NOT handling any calls for you. <br><br> ○ 是: The secretary is answering calls for you. <br><br> ○  : The secretary is putting a call on hold, waiting for you to answer. <br><br> • As a secretary, you can monitor your boss's call status: <br><br> ○  : The boss is NOT holding any calls for you to resume. <br><br> ○  : 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. | •  : The key type **Call Forward** is only available for IP phones. |
| Action URL | Quickly send an HTTP GET request to a specified URL for reporting specific events. | •  : The key type **Action URL** is only available for IP phones. |

# Integration

## Microsoft Outlook Integration

### Microsoft Outlook Integration Overview

Simu Connect Desktop Client supports to integrate with Outlook for Windows, which allows you to make phone calls to your Outlook contacts right from Outlook through Simu Connect Desktop Client. This topic describes the requirements and key features of Microsoft Outlook integration.

> ⚠ **Important:**
> **Simu Connect macOS Desktop** does NOT support integration with Microsoft Outlook.

### Requirements

Ensure that your Microsoft Outlook meets the following requirements:

- **Client**: Outlook for Windows
- **Version**: Outlook 2016 or later
- **Operating System**: Windows 10, Windows 11

### Key features

The integration of Simu Connect Desktop Client and Outlook provides the following key features:

**Make Calls in Outlook**

Launch phone calls to your Outlook contacts directly from Outlook through Simu Connect Desktop Client.

**Call Popup**

Automatically bring up the contact's profile on Outlook when you receive an inbound call from an Outlook contact through Simu Connect Desktop Client.

**Call Journal**

All the call activities get logged automatically to Outlook when you end calls with Outlook contacts through Simu Connect Desktop Client.

**Automatic Contact Creation**

Automatically pop up the contact creation page on Outlook when you receive
or make calls with an unknown number that doesn't match an Outlook contact.

**Related information**

# Integrate Simu Connect Desktop Client with Outlook for Windows

This topic describes how to integrate Simu Connect Desktop Client with Outlook for
Windows.

> ⚠️ **Important:**
> **Simu Connect macOS Desktop** does NOT support integration with Microsoft
> Outlook.

## Requirements

Ensure that your Microsoft Outlook meets the following requirements:

- **Client**: Outlook for Windows
- **Version**: Outlook 2016 or later
- **Operating System**: Windows 10, Windows 11

## Step 1. Set up Outlook integration on Simu Connect Desktop Client

1. Log in to Simu Connect Desktop Client, go to **Preferences > Integration**.
2. Turn on the switch of **Enable Outlook Integration**.



3. Set up automatic contact creation and call logs synchronization as needed.

| Feature | Instruction |
|---|---|
| Automatic Contact Creation | With automatic contact creation set up, Outlook will automatically pop up the contact creation page when you receive or make calls with an unknown number that doesn't match an Outlook contact. <br><br> a. Select the checkbox of **Create New Contacts Automatically**. <br> b. In the **Call Types to Auto-create Contacts** drop-down list, select when will Outlook pop up the contact creation page. |

| Feature | Instruction |
|---|---|
| | • **Inbound**: Inbound call from an unknown number that doesn't match an Outlook contact.<br>• **Outbound**: Outbound call to an unknown number that doesn't match an Outlook contact. |
| Call Logs Synchronization | With call logs synchronization enabled, all the call histories with your Outlook contacts will be synchronized to Outlook.<br><br>To enable call log synchronization, select the checkbox of **Synchronize Call Logs Automatically**. |

4. Click **Save**.

## Step 2. Activate Simu Connect add-in on Outlook

1. Open or restart Outlook, go to **File > Options**.
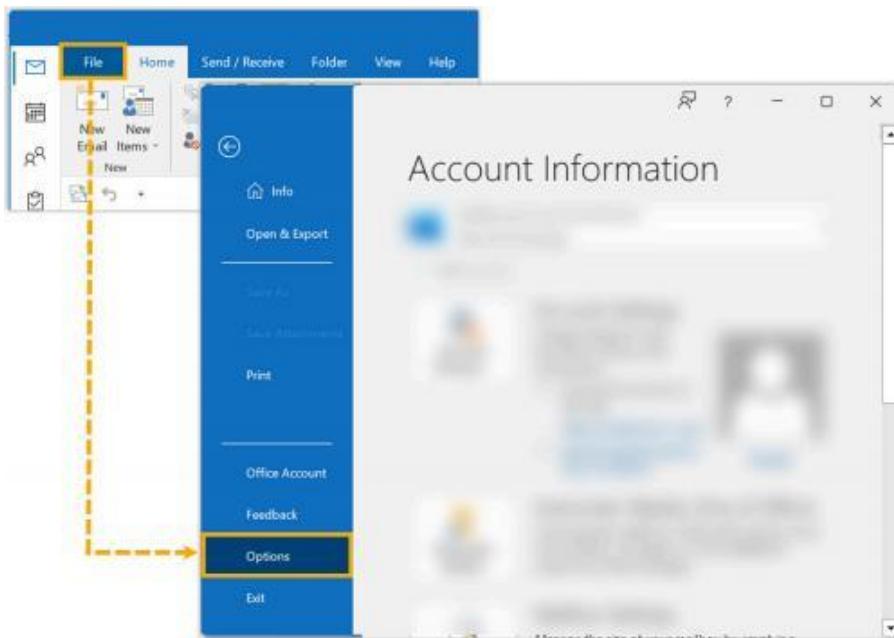


2. In the pop-up window, click **Add-ins** and click **Go...**.
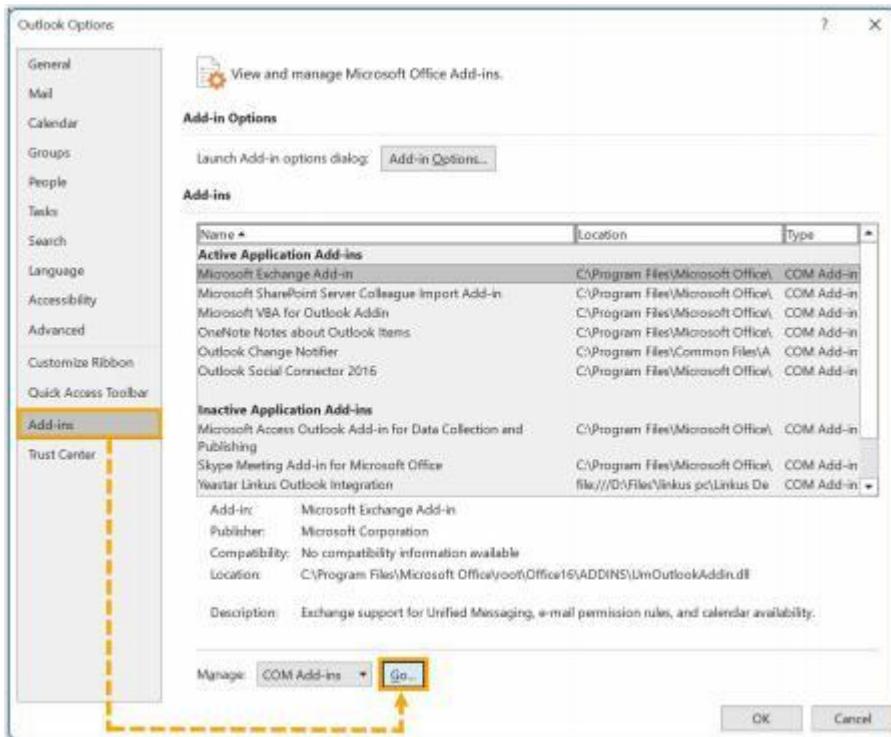
3. In the pop-up window, select the checkbox of **Cloud One Simu Connect Outlook Integration** and click **OK**.
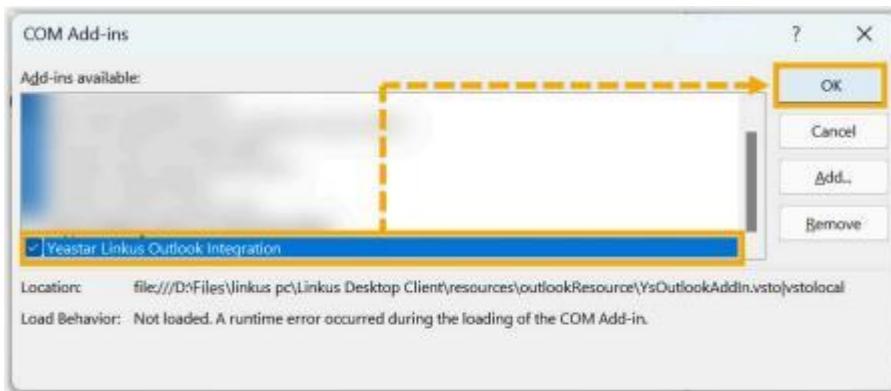


4. In the pop-up window, click **Install**.

## Result

- The integration of Simu Connect Desktop Client and Outlook for Windows is set up.
- You can make phone calls and utilize call features within Outlook.

# Use Microsoft Outlook Integration

This topic shows the usage of the key features that can be achieved after integrating Simu Connect Desktop Client with Outlook for Windows.

## Make calls in Outlook

### Prerequisites

Simu Connect Desktop Client stays logged in.

### Procedure

On your Outlook contact list, right click a contact and select **Call with Simu Connect Desktop**, then decide which number you want to call. Simu Connect Desktop Client will automatically pop up and initiate the call.
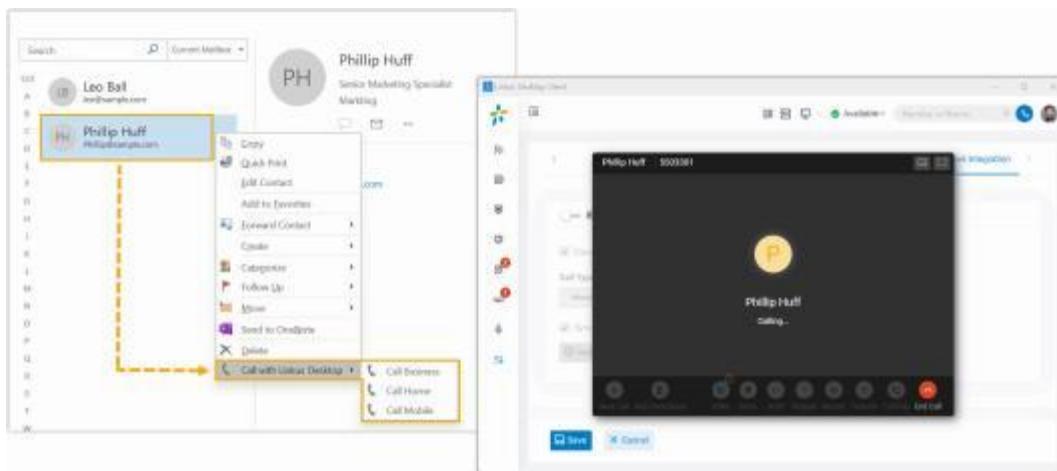


> ✏️ **Note:**
>
> • You can also make calls to your Outlook contacts by right clicking the recipient or sender in an email.
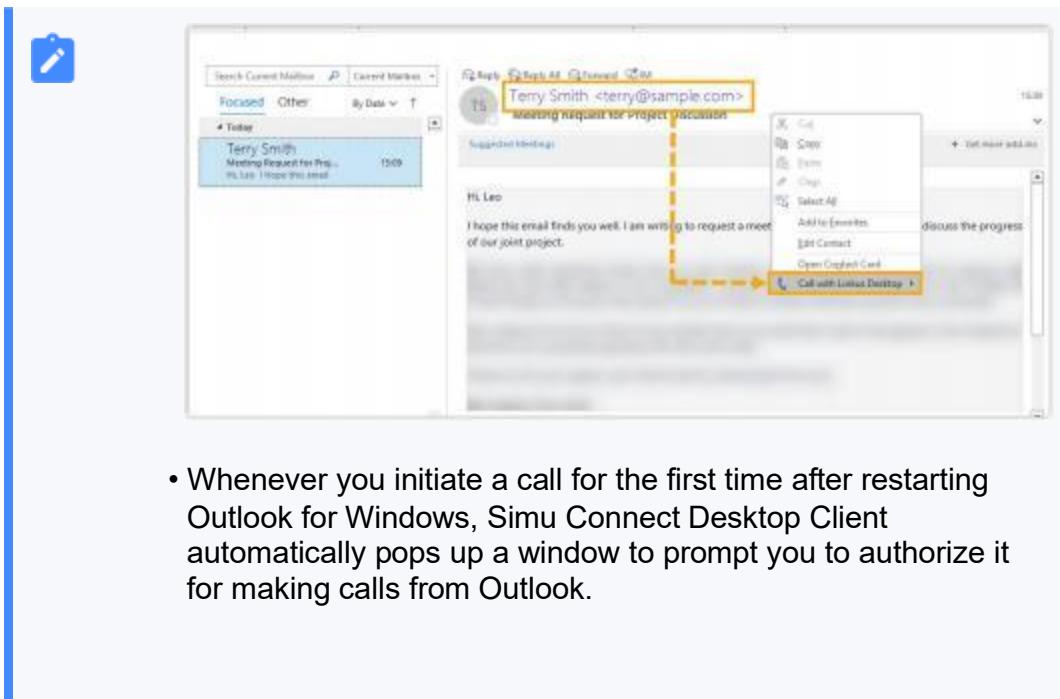
- Whenever you initiate a call for the first time after restarting Outlook for Windows, Simu Connect Desktop Client automatically pops up a window to prompt you to authorize it for making calls from Outlook.

## Call Popup

### Prerequisites

Outlook for Windows stays logged in.

### Procedure

When you receive an inbound call from an Outlook contact, Outlook will pop up to show the contact's information.
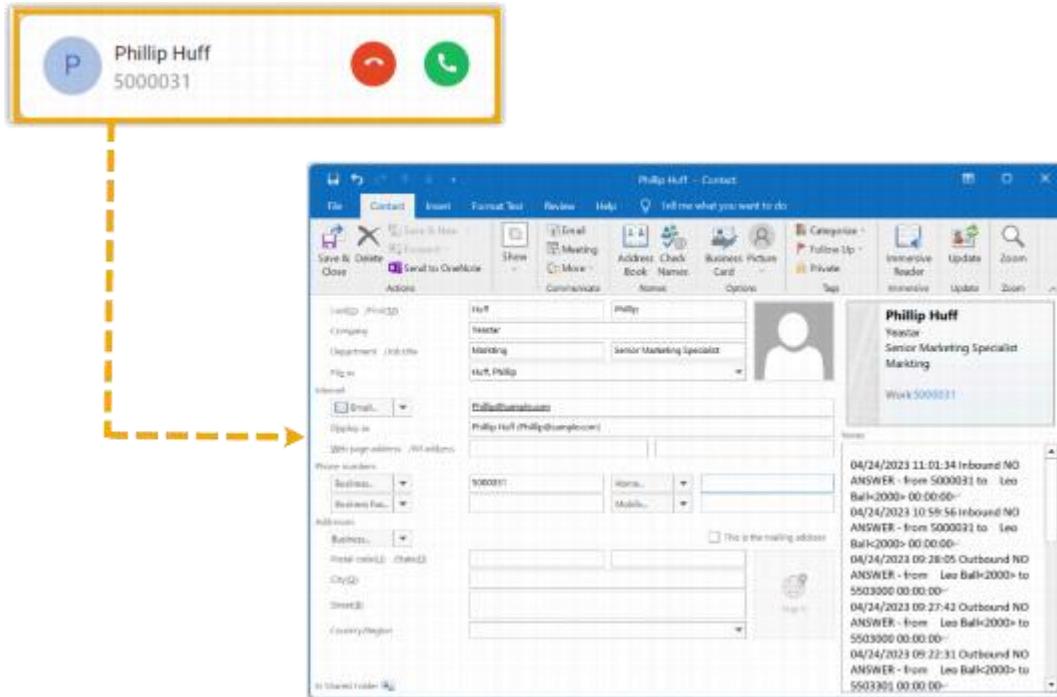
**Troubleshooting:**

Simu Connect Desktop Client does NOT display the caller's name?

If the Simu Connect Desktop Client only displays the phone number when receiving calls from your Outlook contacts, you need to contact the system administrator to **synchronize your Outlook contacts to your app name clients**.

## Call Journal

### Prerequisites

- Outlook for Windows stays logged in.
- You have enabled call logs synchronization.

### Procedure

All outbound calls, inbound calls, and missed call histories with your Outlook contacts will be logged to Outlook automatically, which helps you to keep track of every conversation.

You can log in to Outlook, go to the **Notes** section in a contact editing page to view the call logs.
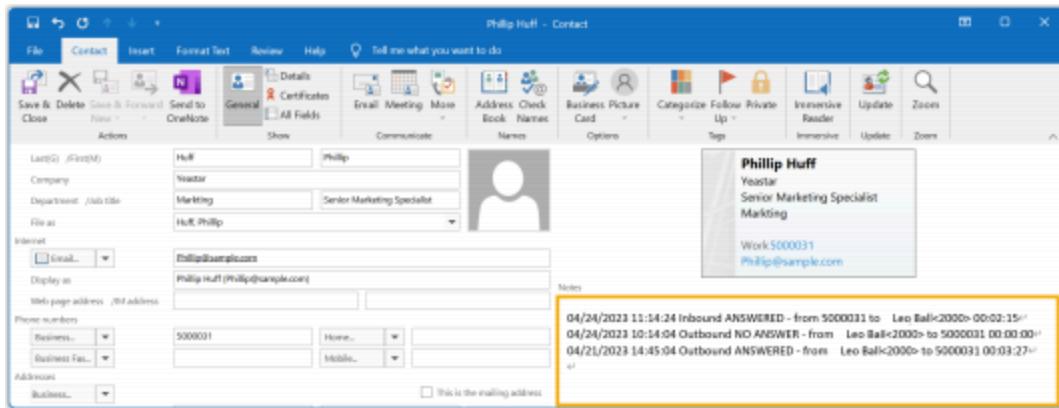
## Automatic Contact Creation

### Prerequisites

- Outlook for Windows stays logged in.
- You have set up automatic contact creation.

### Procedure

When you receive or make calls with an unknown number that doesn't match an Outlook contact, Outlook automatically brings up the contact creation page and logs the phone number. You can update other details and save it as your Outlook contact.
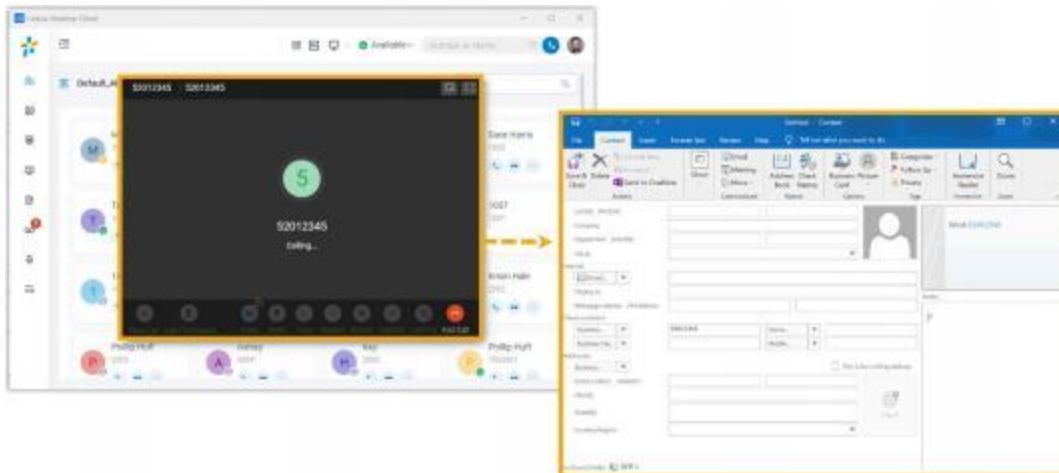


# Disable Microsoft Outlook Integration

This topic describes how to disable the integration of Simu Connect Desktop Client and Outlook for Windows.

## Step 1. Disable Outlook integration on Simu Connect Desktop Client

1. Log in to Simu Connect Desktop Client, go to **Preferences > Outlook Integration**.
2. Turn off the switch of **Enable Outlook Integration**.



3. Click **Save**.

## Step 2. Inactivate Simu Connect add-in on Outlook

1. Log in to Outlook, go to **File > Options**.
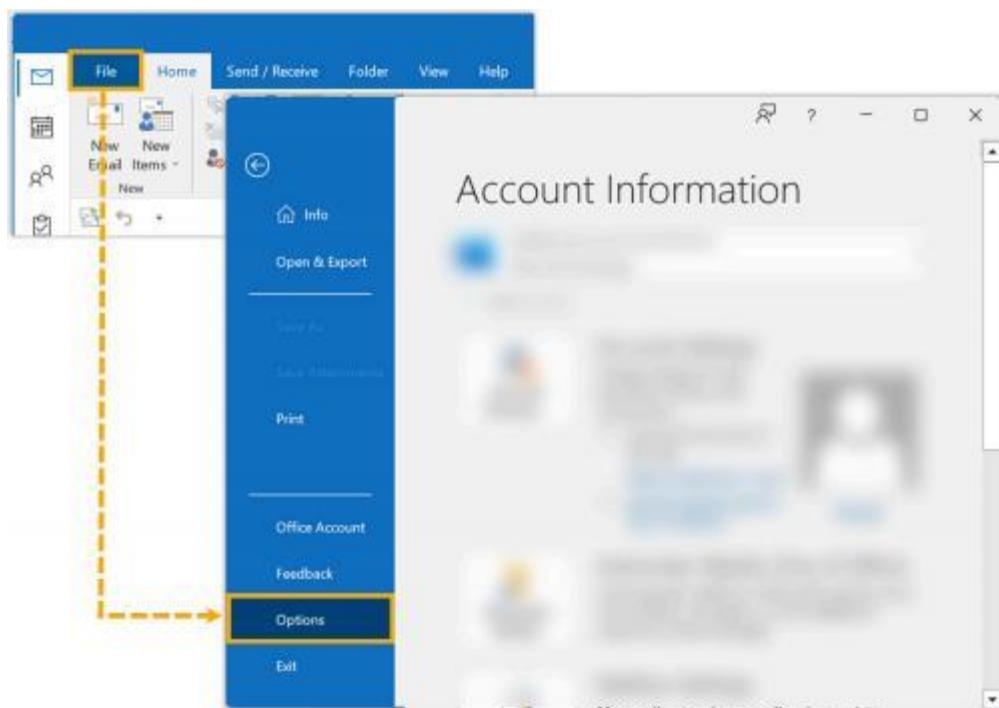


2. In the pop-up window, click **Add-ins** and click **Go...**.
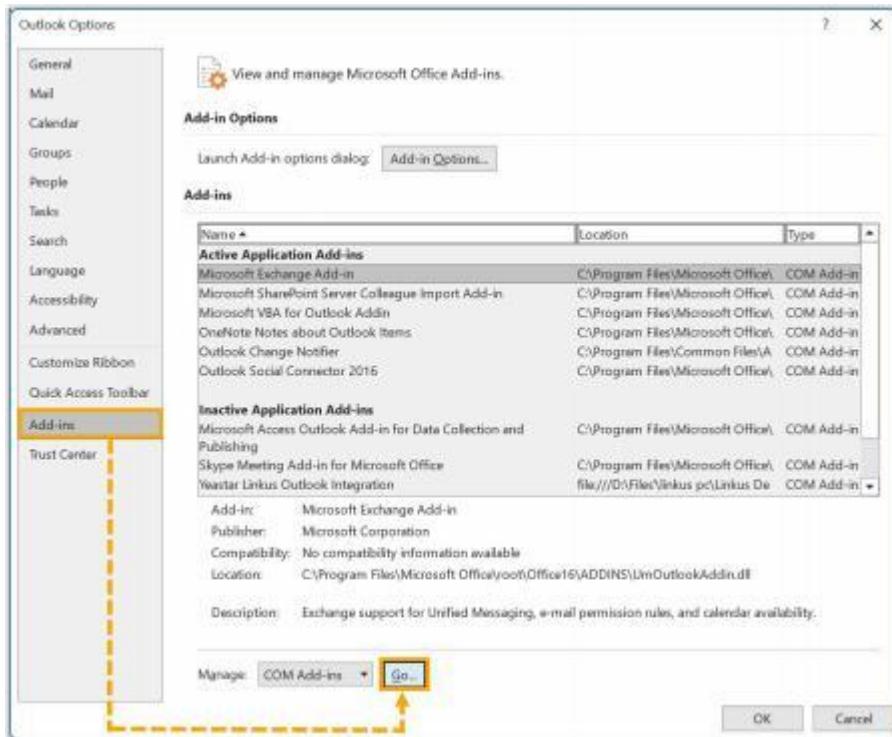
3. In the pop-up window, unselect the checkbox of **Cloud One Simu Connect Outlook Integration** and click **OK**.
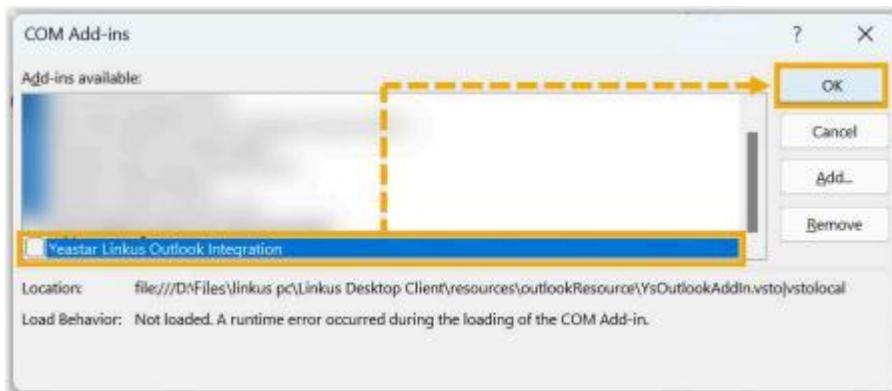


## Result

The integration of Simu Connect Desktop Client and Outlook is disabled, along with all the features provided by the Outlook integration.

# TAPI Integration

## TAPI Integration Guide

## Integrate Simu Connect Desktop Client with TAPI

Cloud One offers a TAPI software driver that can be installed on your PC to seamlessly integrate with your Simu Connect Desktop Client (Windows Desktop). This integration allows you to implement click-to-call directly from a variety of TAPI-enabled applications (such as your CRM application) using Simu Connect Desktop Client, eliminating the need for manual dialing of telephone numbers and thus enhancing productivity.

> **Note:**
> The TAPI integration is available for **Simu Connect Desktop Client (Windows Desktop)** only.

### Requirements

- **PBX Server**: Version 84.17.0.16 or later
- **Simu Connect Desktop Client (Windows Desktop)**: 1.8.3 or later
- **Windows Operating System**: Windows 7, Windows 8, Windows 8.1, Windows 10, Windows 11, Windows Server 2008 R2, Windows Server 2012 R2, Windows Server 2016, and Windows Server 2019 (all 64-bit)

### Install the Cloud One TAPI driver

Download the TAPI driver on Simu Connect Desktop Client and install the driver on your PC.

1. Log in to Simu Connect Desktop Client, go to **Preferences > Integration**.
2. At the top-right corner of the **TAPI Integration** section, click **TAPI Driver Download**.

**TAPI Integration**                                    TAPI Driver Download

· First, click on the upper right corner to download the driver and follow the wizard to complete the installation.
· After installation, you will see **"Cloud One TAPI Service Provider"** in your Windows settings > Phone and Modem > Advanced.
· After the application is connected to TAPI, if the status below says **"Connected"**, TAPI is ready for use.

Status:

● Disconnected

A **Simu Connect TAPISetup.exe** file is downloaded to your PC.

3. Open the **Simu Connect TAPISetup.exe** to install the TAPI driver.

    a. Select the desired language.
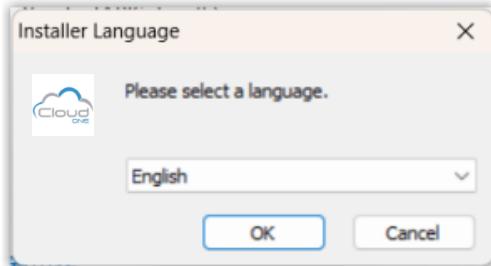


    b. Click **Install**.

       Screen shoot

The TAPI driver installation starts.

    c. When finished, click **Finish** to close the installer program.

    d. In the pop-up window, click **OK**.

4. Restart the Simu Connect Desktop Client.

## Check the installation result of the Cloud One TAPI driver

You can check whether the Cloud One TAPI driver is installed successfully on your PC.

1. Press **Win** + **R** to open the Run command window.
2. Type telephon.cpl and press **Enter** to open the **Phone and Modem** window.

   Under the **Advanced** tab, if you see the **Cloud One TAPI Service Provider** displayed in the **Providers** list, it indicates that the Cloud One TAPI driver is installed successfully.

   Screen shoot

## Make a test call via Cloud One TAPI driver

Make a test call to verify whether the Cloud One TAPI driver is operational. In this example, we use the Windows **Dialer** app to show how to make a call via Cloud One TAPI driver.

### Prerequisites

- You have logged in to Simu Connect Desktop Client.
- The **Dial out immediately** setting on Simu Connect Desktop Client has been enabled.

Screen shoot

• If you have set up default calling app to other driver or app for your PC before, you need to change it to your app name.

**Procedure**

1. On your PC, press **Win** + **R** to open the Run command window.
2. Type dialer.exe, then press **Enter** to open the **Phone Dialer** window.
3. On the top menu, click **Tools**, then select **Connect Using...**.
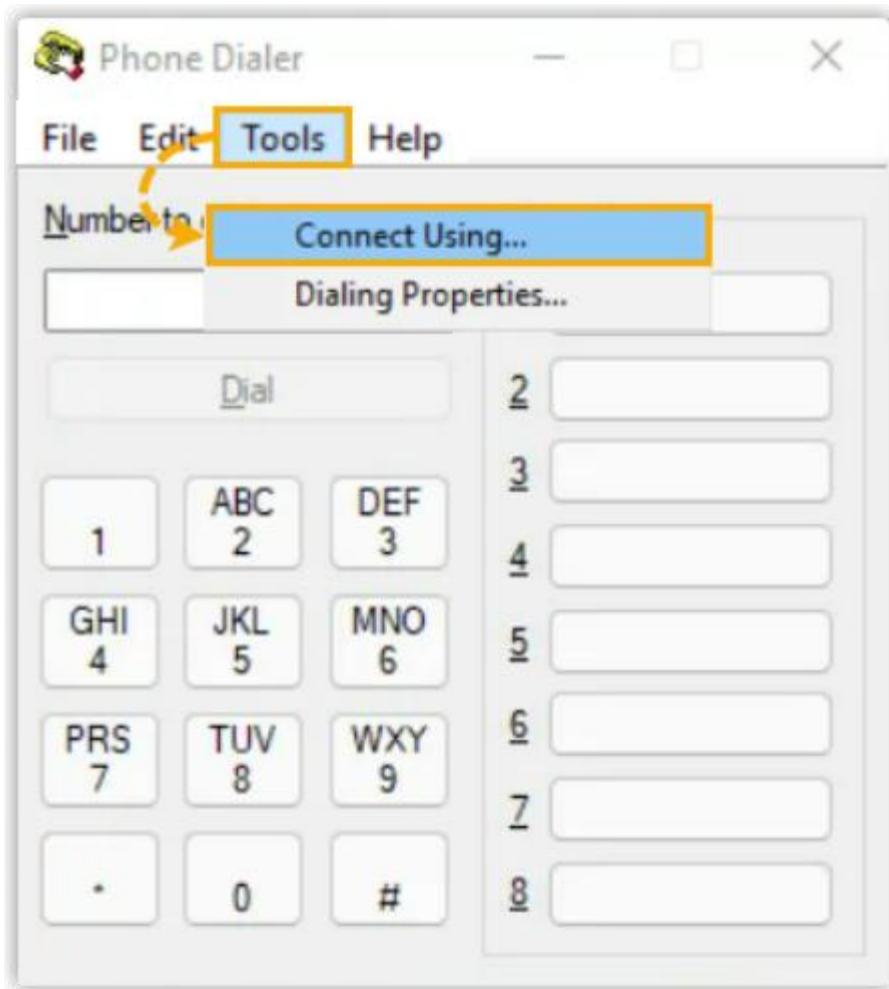
4. In the **Line** drop-down list, select **Cloud One TAPI Service Provider**, then click **OK**.

In this way, numbers dialed in the **Dialer** will be called out through this line.

> **Note:**
> When Cloud One TAPI driver is selected as the line, the TAPI connectivity on Simu Connect Desktop Client will be displayed as **Connected**.

5. In the **Number to dial** field, enter a phone number and click **Dial**.
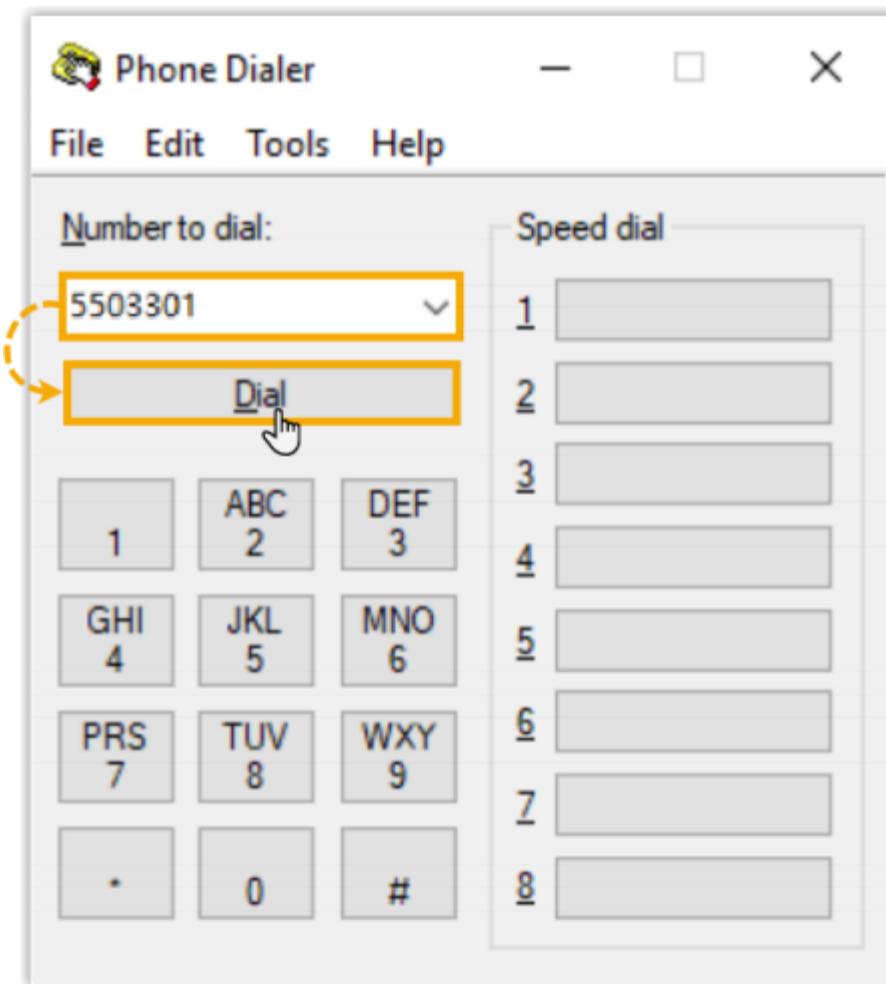


Simu Connect Desktop Client is launched, initiating an outgoing call.

# TAPI Integration Guide (Deutsch)

## Integrieren Sie den your app name-Desktop-Client mit TAPI

Cloud One bietet einen TAPI-Softwaretreiber an, der auf Ihrem PC installiert werden kann, um naht los mit Ihrem Simu Connect Desktop Client (Windows Desktop) zu integrieren. Diese Integration ermöglicht es Ih nen, einen "Click-to-Call" Anruf direkt aus einer Vielzahl von TAPI-fä higen Anwendungen (wie Ihrer CRM-Anwendung) mithilfe des Simu Connect Desktop Clients
zu implementieren. Somit entfä llt manuelles Wählen von Telefonnummern, verringert die Fehlerquote und steigert somit die Produktivität.

> **Note:**
> Die TAPI-Integration ist nur für den **Simu Connect Desktop Client (Windows Desktop)** verfügbar.

### Anforderungen

- **PBX-Server**: Version 84.14.0.24 oder neuer
- **Simu Connect Desktop Client (Windows Desktop)**: 1.4.9 oder neuer
- **Windows-Betriebssystem**: Windows 7, Windows 8, Windows 8.1, Windows 10 und Windows 11 (alle 64-Bit)

### Installation des Cloud One TAPI-Treibers

Laden Sie den TAPI-Treiber auf Ihrem your app name-Desktop-Client herunter und installieren Sie den Treiber auf Ihrem PC.

1. Melden Sie sich beim Simu Connect Desktop Client an und gehen Sie zu **Preferences > Integration**.
2. In der oberen rechten Ecke des Absch nitts **TAPI Integration** klicken Sie auf **TAPI Driver Download**.
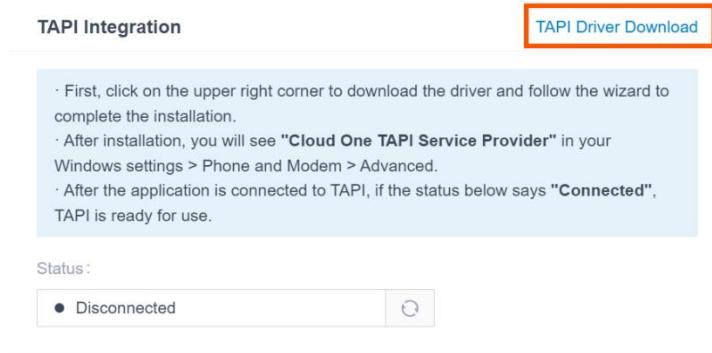


Es wird eine Datei mit dem Namen **Cloud One TAPISetup.exe** auf Ihren PC herunterge- laden.
3. Öffnen Sie die Datei **Cloud One TAPISetup.exe**, um den TAPI-Treiber zu installieren.
   a. Wählen Sie die gewünschte Sprache aus.
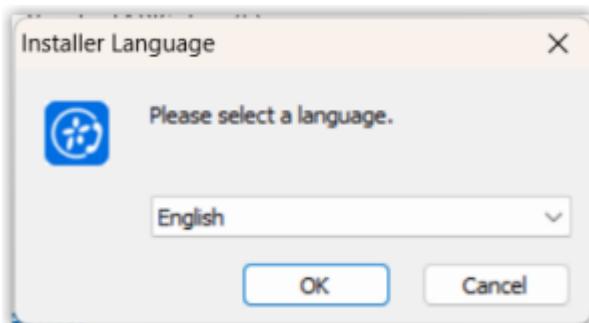


   b. Klicken Sie auf **Install**.

Screen shoot

Die Installation des TAPI-Treibers beginnt.

c. Wenn die Installation abgeschlossen ist, klicken Sie auf **Finish**, um das Installationsprogramm zu schließen.

Screen shoot

## Überprüfen Sie das Installationsergebnis des Cloud One TAPI-Treibers.

Sie können folgendermaßen überprüfen, ob der Cloud One TAPI-Treiber erfolgreich installiert wurde.

| Methode | Anleitung |
|---|---|
| Überprüfen Sie das Installationsergebnis auf Ihrem PC. | 1. Drücken Sie **Win** + **R**, um das Fenster "Ausführen" zu öffnen.<br>2. Geben Sie telephon.cpl ein und drücken Sie die Eingabetaste, um das Fenster **Phone and Modem** zu öffnen.<br><br>Unter dem Tab **Advanced**, wenn Sie den your brand name TAPI-Dienstanbieter in der Liste der Anbieter sehen, zeigt dies an, dass der Cloud One TAPI-Treiber erfolgreich installiert wurde. |
| Überprüfen Sie die TAPI-Konnektivität im <mark>your app name</mark> Desktop-Client. | 1. Öffnen Sie im Simu Connect Desktop-Client die Einstellungen und navigieren Sie zu **Preferences > Integration > TAPI Integration**. |

| Methode | Anleitung |
|---|---|
| | 2. Im Statusfeld klicken Sie auf ⟳ , um denVerbindungsstatus zu aktualisieren. Wenn der Status als **Connected** angezeigtwird, deutet dies darauf hin, dass der Cloud One TAPI-Treiber erfolgreich installiert wurde.  |

## Führen Sie einen Testanruf über den Cloud One TAPI-Treiber durch

Füh ren Sie einen Testanruf durch, um zu ü berprüfen, ob der Cloud One TAPI-Treiber funktion- iert. In diesem Beispiel verwenden wir die Windows-Wähl-App, um zu zeigen, wie ein Anruf ü ber den Cloud One TAPI-Treiber getätigt wird.

### Voraussetzungen:

- Sie haben sich im Simu Connect Desktop-Client angemeldet.
- Die Funktion **Dial out immediately** im Simu Connect Desktop-Client wurde ak- tiviert.
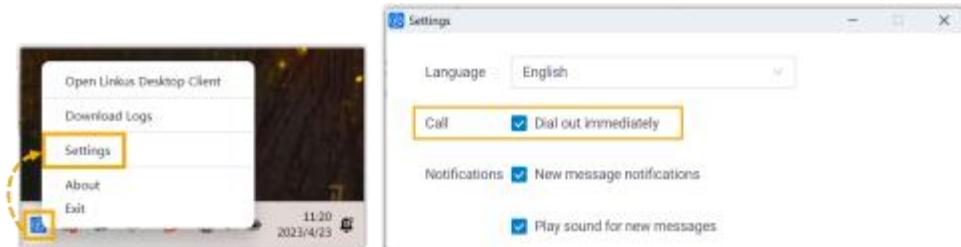


- Wenn Sie zuvor eine andere Standardanruf-App oder einen anderen Treiber für Ih ren PC eingerichtet haben, müssen Sie diese auf Simu Connect än- dern.

### Vorgehensweise

1. Drücken Sie auf Ihrem PC **Win** + **R**, um das Fenster "Ausführen" zu öff- nen.

2. Geben Sie dialer.exe ein und drücken Sie dann die **Enter**, um das Fenster **Phone Dialer** zu öffnen.
3. Klicken Sie im o beren Menü auf **Tools**, und wählen Sie dann **Connect Using...**.
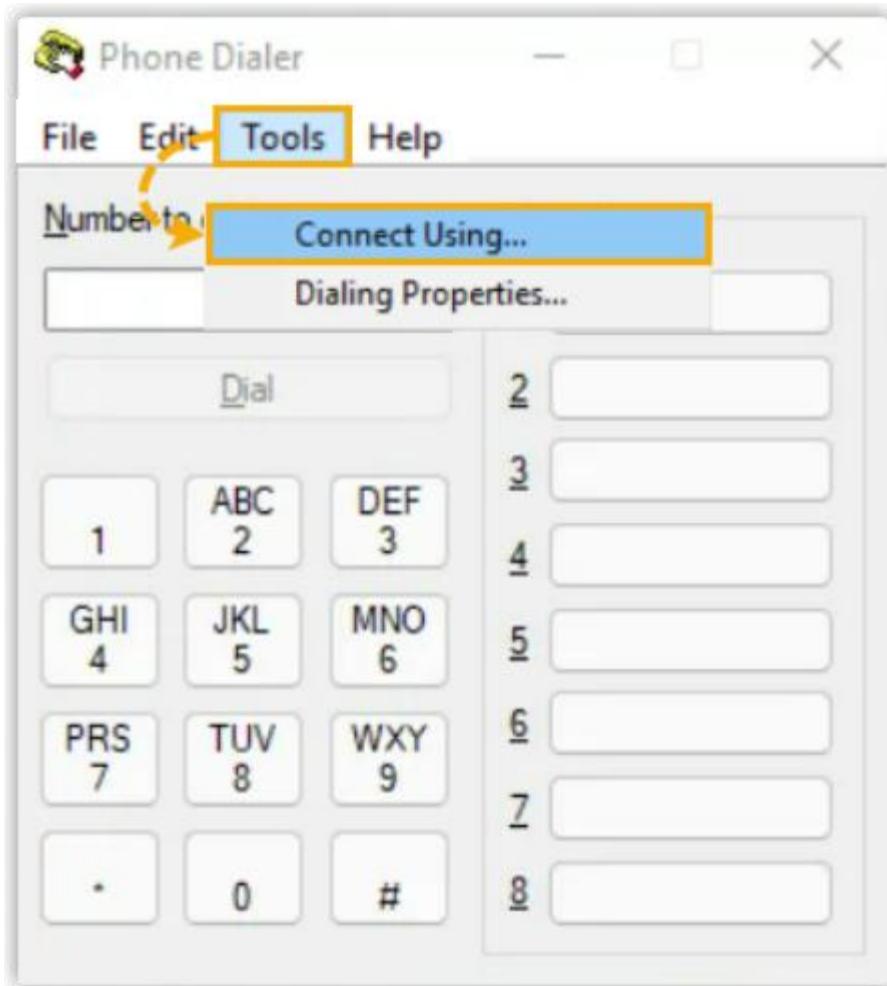


4. Wählen Sie im Dropdown-Menü **Line** den Eintrag **Cloud One TAPI Service Provider** aus und klicken Sie dannauf **OK**.

Auf diese Weise werden die im **Dialer** gewählten Nummern über diese Leitung angerufen.

5. Geben Sie im Feld **Number to dial** eine Telefonnummer ein und klicken Sie dannauf **Dial**.