

managedIP UC

Desktop Application User Guide



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About this Guide

This user guide provides guidelines on installing, setting up, and using the managedIP UC application on your computer.

 **NOTE:** Screens pictured in this guide are samples and may differ from actual screens. Features available within the application may vary depending upon the services you are subscribed to. We recommend contacting your company administrator if there are questions regarding your assigned service package.

managedIP UC Desktop Application

The managedIP UC desktop application can be installed on a host computer and used to place and answer phone calls, as well as send messages via the Internet.

This application supports the following features:

- Inbound and outbound calls
- Call forwarding
- Call recording
- Voicemail
- Call transfer
- Messaging

REQUIREMENTS

To use this desktop application, ensure the host computers are connected to the Internet and equipped with communication services. A headset may be needed.

MINIMUM SYSTEM REQUIREMENTS

WINDOWS DESKTOP:

To ensure the softphone application runs smoothly, the user devices must meet certain minimum system requirements.

OS Versions

The minimum supported OS version is Windows 10 22h2.

Hardware Recommendation

Our application supports a variety of hardware, and our recommendations are as follows:

- CPU Specifications: 64-bit architecture, minimum 4 cores, 2.4 GHz clock speed or higher
- CPU Model: Intel Skylake (6th generation, 2015), AMD Epyc, Ryzen and newer models



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- RAM: Minimum 8 GB RAM
- Storage: Solid-state drive (SSD)

MAC DESKTOP:

OS Versions

The devices should be running macOS 13 (Ventura) and onwards.

ANDROID MOBILE:

OS Versions

The minimum supported OS version is Android 8.

iOS MOBILE:

OS Versions

The devices should be running iOS 16 and onwards.

Network Requirements

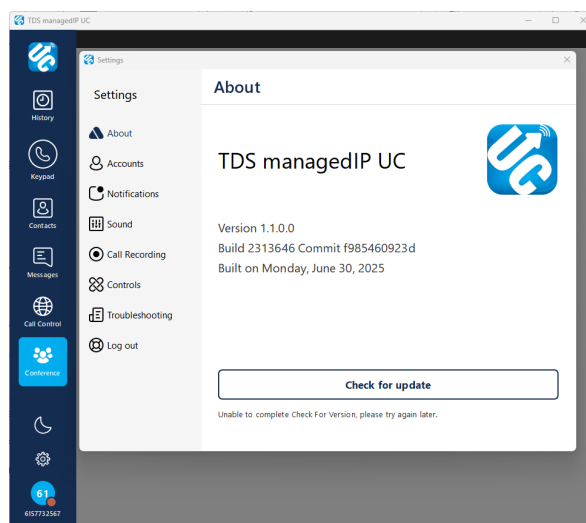
Please ensure your network is compatible with the following security system rules.

FIREWALL RULES FOR TDS MANAGEDIP UC			
PROTOCOL	PORTS	SOURCE	DESTINATION
TCP	443, 8443, 9519, 773	TDS	Private IP/Public IP : 10.128.0.4/104.198.16.57
UDP	3478, 45000 - 65000	TDS	Private IP/Public IP : 10.128.0.4/104.198.16.57

Determining the Application Version

Determine the application version on the host computer to check if the latest software is being used.

Select **Settings** (2) from the left navigation menu. The **Settings** window with **About** (1) displayed by default contains the application name and the software version.



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Initial Setup

To begin using this application, the user must have a username and password. Check with your managedIP Hosted system administrator to get the account credentials. Download and install the application on the host computer, sign in with the credentials, and set up the work account to begin using this application.

INSTALLING THE APPLICATION

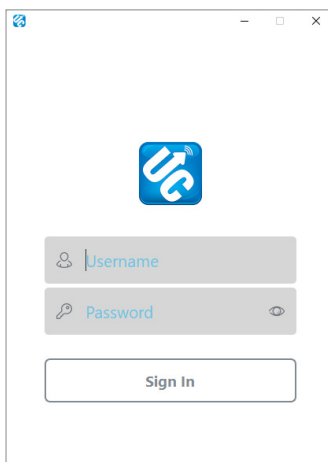
To begin, visit our support site to download the managedIP UC application:
<https://support.tdsmanagedip.com/uc.html>

1. Copy or download the managedIP UC installer on the host computer.
Important: On a Mac computer, copy the application file to the **Applications** folder.
2. Open the installer.
3. Follow the instructions on the dialogue window to install the application.

SIGNING IN TO THE APPLICATION

To start using the application, sign in with the account credentials provided by the system administrator.

1. Open the application.
A window prompts the user to sign in.



2. Fill in the **Username** and **Password** fields.
Important: If you do not have these credentials, contact your managedIP Hosted system administrator.
3. Select the **Sign In** button.



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PERMISSIONS SETTINGS

Upon signing in, the initial setup requires the users to allow some permissions, such as the default calling application, location, and media device settings before using this application. To reaccess these settings, select  > **Controls** > **Wizard**.

SETTING THE DEFAULT CALLING APPLICATION

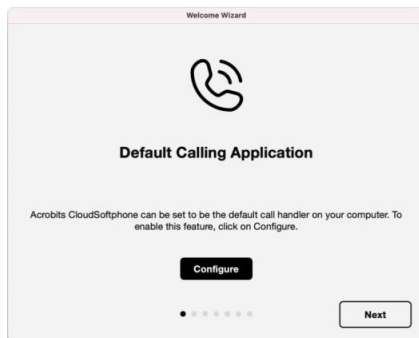
This application handles all the calls on the host computer once it is set as the default calling application.

To set this application as the default calling application:

MAC DESKTOP:

1. Upon signing in, on the **Welcome Wizard** dialog box select the **Configure** button.

 **NOTE:** Select the **Next** button to set the default calling application later.



(height: 2.1 in.)

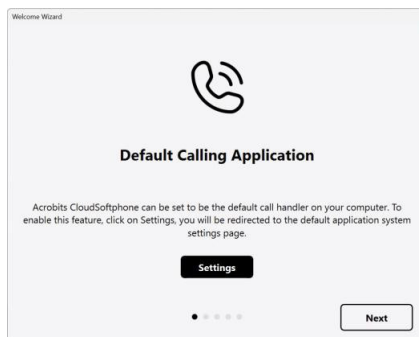
A confirmation box displays.

2. Select **Yes** on the confirmation box.
3. Select the **Next** button.

WINDOWS OS COMPUTER:

1. Upon signing in, on the **Welcome Wizard** dialog box select the **Settings** button.

 **NOTE:** Select the **Next** button to configure the default calling application later.



(height: 2.1 in.)



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2. On the **Settings** window, select this application from the application list.
3. Scroll through the list and select **TEL**.
4. Select this application in the application list and then select the **Set default** button.
5. Close the Settings window.
6. Select the **Next** button.

Next, the **Welcome Wizard** dialog box displays the location and device permissions settings.

SETTING THE LOCATION PERMISSION

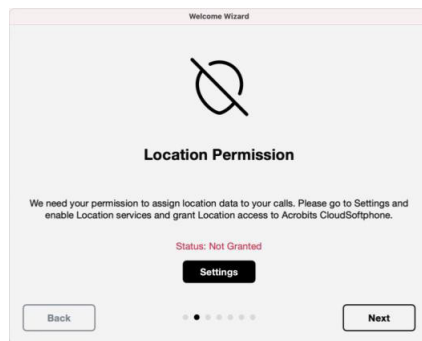
The location permission enables this softphone application to access location-based information.

Important: Some service providers require this permission to work. Check with the system administrator if you have any questions about this setting.

1. On the **Welcome Wizard** dialog box displaying **Location Permission**, select the **Settings** button.



NOTE: Select the **Next** button to configure this later.



(height: 2.1 in.)

The Security and Privacy window displays location access.

2. Follow the instructions on the window to make changes to the location and privacy settings:
 - On a Mac computer, click the Lock icon and enter the administrator password before making the permission changes. Next, select this application under **Enable Location Service**. Then, close the window.
 - On a Windows computer, ensure **Let desktop apps access your location** includes this application and is turned on. Then, close the window.

The **Welcome Wizard** dialog box displays the location permission status as **Granted**.

3. Select the **Next** button.



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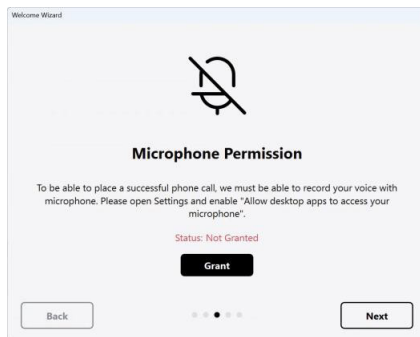
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SETTING THE DEVICES PERMISSIONS

After granting the permissions for devices such as the camera and microphone access, the application can use them in calls.

1. On the **Welcome Wizard** dialog box displaying **Microphone Permission**, select the **Grant** button.

✓ **NOTE:** Select the **Next** button to button to configure this later.



(height: 2.1 in.)

2. The Security and Privacy window displays microphone access.
3. Follow the instructions on the window to manually grant the microphone access in this application:
 - On a Mac computer, click the Lock icon and enter the administrator password before making the permission changes. Next, select this application under **Allow the apps below to access your microphone**. Then, close the window.
 - On a Windows computer, ensure **Let desktop apps access your microphone** includes this application and is turned on. Then, close the window.

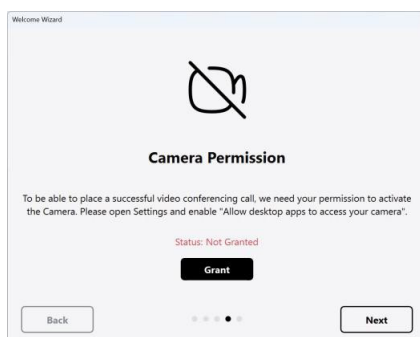
The **Welcome Wizard** dialog box displays the microphone permission status as **Granted**.

4. Select the **Next** button.

The **Welcome Wizard** dialog box displays **Camera Permission**.

5. Select the **Grant** button.

✓ **NOTE:** Select the **Next** button to button to configure this later.



(height: 2.1 in.)



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The Security and Privacy window displays camera access.

6. Follow the instructions on the window to manually grant the microphone access in this application:

- On a Mac computer, click the Lock icon and enter the administrator password before making the permission changes. Next, select this application under **Allow the apps below to access your camera**. Then, close the window.
- On a Windows computer, ensure **Let desktop apps access your camera** includes this application and is turned on. Then, close the window.

The **Welcome Wizard** dialog box displays the camera permission status as **Granted**.

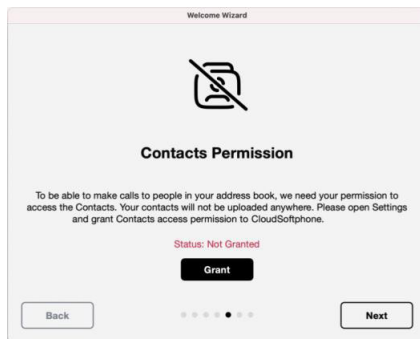
7. Select the **Next** button.

SETTING CONTACTS AND NOTIFICATION PERMISSIONS FOR MAC OS

After granting the contacts and notification permissions, this application can open the contact directory and the host computer can receive alerts from this application.

1. On the **Welcome Wizard** dialog box displaying **Contacts Permission**, select the **Grant** button.

✓ **NOTE:** Select the **Next** button to button to configure this later.



(height: 2.1 in.)

The Security and Privacy window displays contact access.

2. Click the Lock icon and enter the administrator password before making the permission changes. Next, select this application under **Allow the apps below to access your contacts**. Then, close the window. The **Welcome Wizard** dialog box displays the contacts permission status as **Granted**.

3. Select the **Next** button.

The **Welcome Wizard** dialog box displays **Notification Permission**.

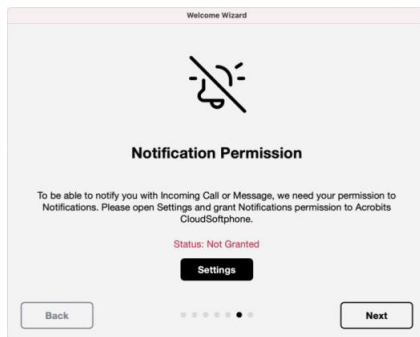
4. Select the **Settings** button.

✓ **NOTE:** Select the **Next** button to button to configure this later.



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(height: 2.1 in.)

The Notifications window displays.

5. Select this desktop application from the application list.

6. Switch on **Allow Notifications**, and then close the Notifications window.

The **Welcome Wizard** dialog box displays the notification permission status as **Granted**.

7. Select the **Next** button.

The **Welcome Wizard** dialog box displays **Setup completed** and this desktop application is ready to use.

ICON DOT INDICATIONS

Upon signing into this application, a green dot should appear on the application icon in the bottom left corner. Contact TDS managedIP Support at 1-888-850-5915 if the icon shows a red dot.

DOT COLOR	INDICATIONS
Green	The account is registered.
Red	The account is not registered yet. Check your internet connection or contact TDS managedIP Support to get assistance.

(OPTIONAL) CHANGING DISPLAY LANGUAGE

The display language of this application follows the default operating system language of the host computer, but users can choose to change it.

To change the display language:

1. Select **Settings > Controls**.
2. Scroll to the **Language** option.
3. Select the drop-down arrows. A list of available languages displays.
4. Select the desired language.



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Using the Application

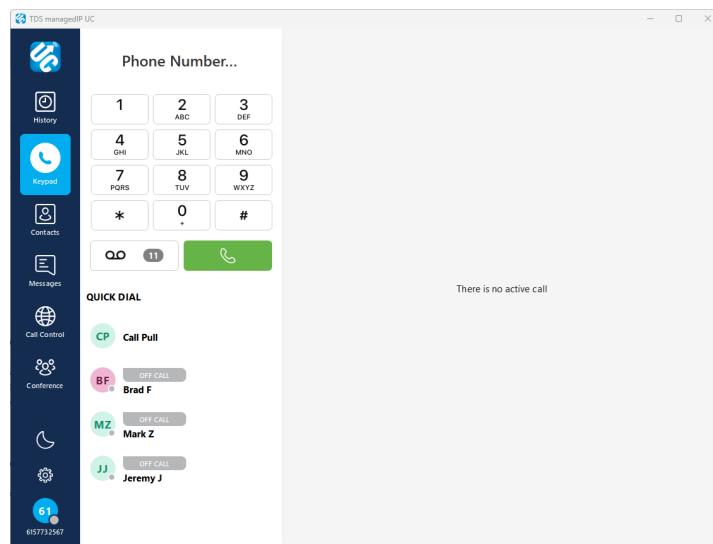
This chapter describes the softphone features and user instructions. Use this application to communicate with other users via calls and instant messaging.

✓ **NOTE:** Depending on your assigned service, the screen may appear differently than the graphics in this user guide.

MAIN WINDOW

Upon successful signing into this application, the **Contacts** window (1) with a dialer is displayed by default.

The **Main** window has a left navigation menu (2) and an icon (3) displaying the account's registration status using this application. When one of the buttons from the left navigation menu is selected, the function pane (6) opens and the details or status of this function displays on the right pane (4). Select the **X** (5) icon to close this window.



(height: 3.7 in.)

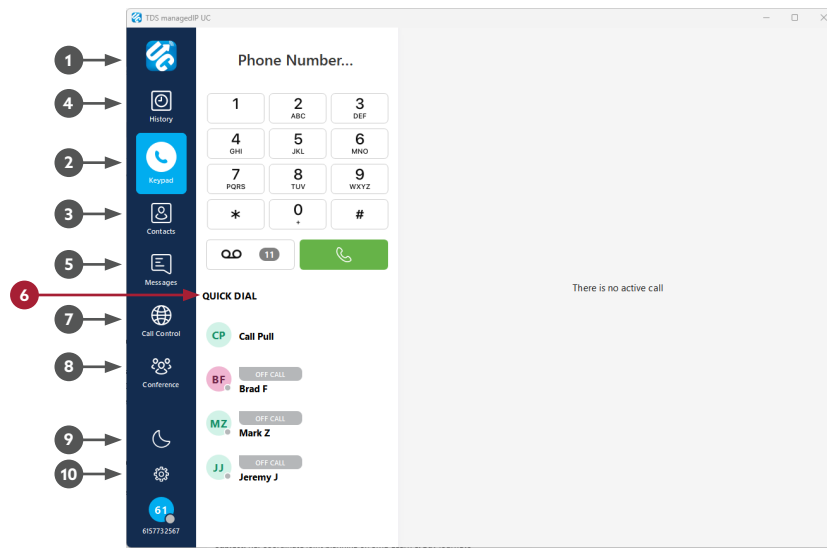


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NAVIGATION MENU

This application provides quick access, such as a dialer, phone contacts lists, and recent calls or messages on the left navigation menu. Use this quick access on this application to make and answer calls, send instant messages, and change the settings.



ITEM	DESCRIPTION
1	Opens the New Chat pane to send messages to your contacts.
2	Use the dialer to make calls or send messages to new phone numbers.
3	Opens your contact directory.
4	Lists the call history.
5	Lists the messaging history.
6	Lists the quick dials.
7	Use Call Control to access your calling features from the web portal
8	Conference: Start, join or schedule a video conference meeting
9	Toggle to turn Do Not Disturb mode on and off.
10	Opens Settings

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MAKING A CALL

Use this application to place a call by dialing a phone number, or call a number from the existing contact lists or call logs. The users can also create a list of quick dials for frequently-called contacts.

Make an outgoing call via the following options:

NEW PHONE NUMBERS

1. Select **Keypad** from the left navigation menu.
2. Dial the phone number.
Important: Include the country codes when dialing the numbers.
For example, use +1 when calling someone from North America.
3. Select the **Call**  button below the dialer to initiate the call.

EXISTING CONTACTS DIRECTORY

1. Select **Contacts** from the left navigation menu.
2. Search and select the contact name.
The right pane displays the contact information.
3. Select the **Call**  button next to the contact number to initiate the call.

QUICK DIALS



NOTE: See the **Adding Quick Dials** section to learn how to add a quick dial.

1. Select **Keypad** from the left navigation menu.
The **Quick Dial** section displays underneath the dialer.
2. Search and select the contact name. The call is initiated.

MESSAGES

1. Select **Messages** from the left navigation menu.
2. Under the **MESSAGES** pane, search and select the contact or phone number.
3. Select the **Call**  button on the top of the right pane to initiate the call.

CALL HISTORY

1. Select **History** from the left navigation menu.
2. Under the **CALLS** pane, search and select the contact name.
The right pane displays the call details.
3. Select the **Call**  button next to the contact number.

Select the **End Call**  button to dismiss a call.

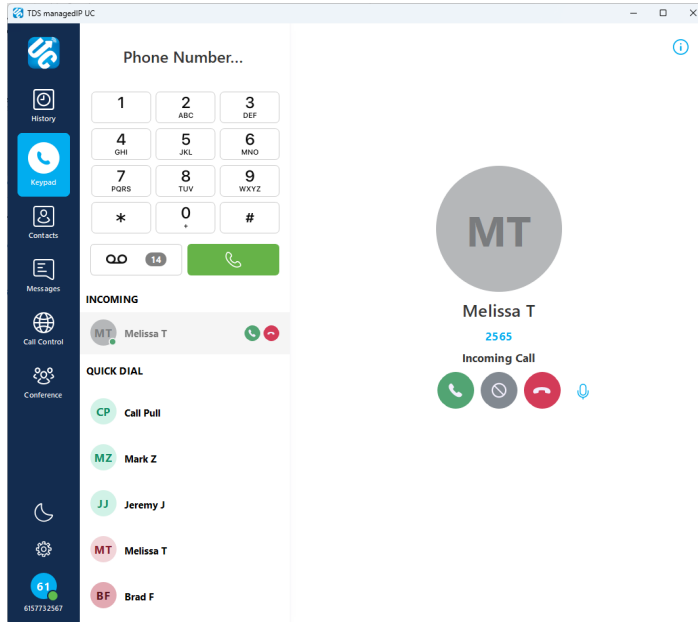


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ANSWERING CALLS

This softphone application rings when someone calls the user. When receiving a phone call, the right pane displays the caller's information (2). Answer or dismiss the call.



When receiving a call:

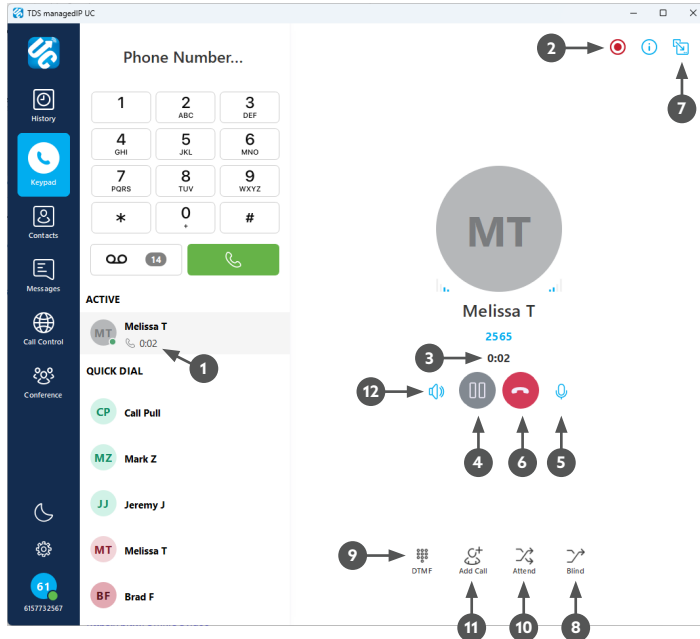
- Select the **Call** (5) button to answer the call.
- Select the **End Call** (4) button to decline the call.
- Select the **Information** (1) icon to display the quality of the call.
- Select the **Mute** (3) icon to turn off the microphone before answering the call. The icon then changes to . Select this icon again to unmute the microphone.

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MID-CALL OPERATION

While in the middle of an active phone call, the user can put the call on hold, record calls, transfer calls (attend and unattended), merge calls, and use the dual-tone multi-frequency (DTMF) keypad.



ITEM	DESCRIPTION
1	Displays active, on hold, and incoming calls underneath the dialer.
2	Toggle to start and stop recording the call. Note: See the Recording Options section for more information.
3	Displays the call duration.
4	Puts the call on hold. By toggling this button, the user can hold or resume the call.
5	Turns off the microphone. By toggling this button, the user can turn on or off the microphone.
6	Dismisses a call.
7	Opens a smaller dialog box of an ongoing call that stays on top of all windows.
8	Initiates a cold or unattended transfer.
9	Opens the dual-tone multi-frequency (DTMF) keypad.
10	Initiates a warm or attended transfer.
11	Adds new call participant(s) to the present call.
12	Turns on the computer speaker.



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MUTING AND UNMUTING THE MICROPHONE

Select the Mute  icon to mute the microphone. The icon then changes to Unmute . Select this icon again to unmute.

CONFIGURING THE AUDIO SETTINGS

Select the **Audio**  icon to change the speaker, microphone, and sound settings.

- If the host computer has more than one audio device, more device options are displayed in the list. A check mark (✓) is displayed on the default or selected devices. Change to another device, if necessary.
- Select **Sound Settings** to open the **Sound** pane in the **Settings** window. See the **Audio Settings** section for more information.

MAKING AN UNATTENDED TRANSFER

Use **Blind**  to initiate an unattended transfer. Unattended transfer, also known as cold or blind transfer, is when you transfer a call to another destination without establishing a conversation with this new call recipient. The call is put on hold until transferred successfully.

To make an unattended transfer:

1. On an active call, select the **Blind**  icon on the right pane.
The call is placed on hold and the phone number field in the **Keypad** pane displays **Transfer call**.
2. To transfer the call to another person, follow the steps in the **Making a Call** section. Once the new recipient answers the call, the user is disconnected from that call.

 **NOTE:** A dialog box displays the message The **transfer has failed** if the new recipient does not answer the call. Select the **Cancel X** icon, and then repeat steps 1 and 2.

MAKING AN ATTENDED TRANSFER

Use **Attend**  to initiate an attended transfer. Attended transfer, also known as warm transfer, is when you transfer a call to another destination but want to speak with this new call recipient before the transfer. The first call is put on hold until the call is transferred successfully.

To make an attended transfer:

1. On an active call, select the **Attend**  icon on the right pane. The call is placed on hold and the phone number field in the **Keypad** pane displays **Transfer call**.
2. To transfer the call to another person, follow the steps in the **Making a Call** section.



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3. Speak with the new call recipient when the new call is answered.

✓ **NOTE:** If the new recipient does not answer the call, the right pane displays that the first call is still on hold.

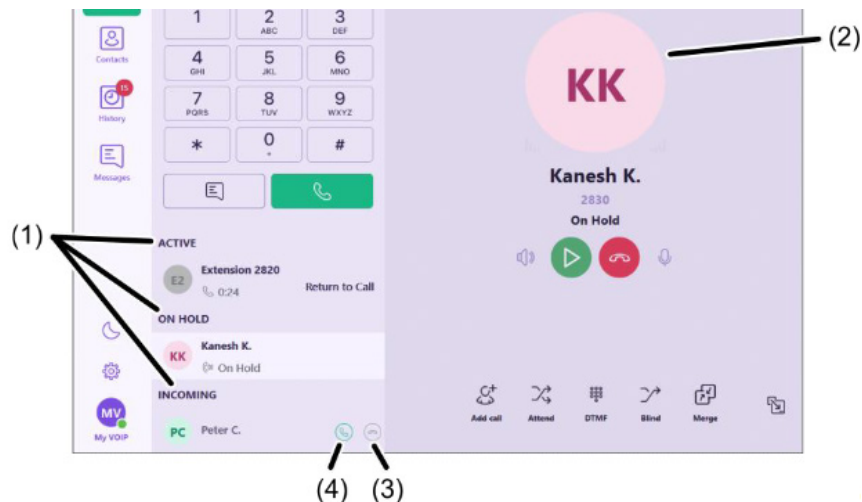
- To attempt another transfer, repeat step 2.
- To cancel the unattended call operation, select the **Cancel X** icon.

4. Select the **Complete Transfer** icon to transfer the call.

The right pane displays **Transfer in progress** when the transfer is successful.

SWITCHING CALLS

View concurrent calls and switch between them underneath the dialer in the **Dialer** tab.



All concurrent calls are visible underneath the dialer.

The title displays the statuses (1) of the calls.

- To switch to another call, select the desired call. The right pane (2) displays the call.
- To pause or resume a call, see the **Placing a Call on Hold** section.
- To answer a new incoming call, select the **Answer** icon (4).
- To dismiss a new incoming call, select the **End Call** icon (3).

RECORDING CALLS

This application can record voice calls. Use this feature when reviewing the call content is required.

Important: Some countries impose laws and regulations on recording calls. We recommend

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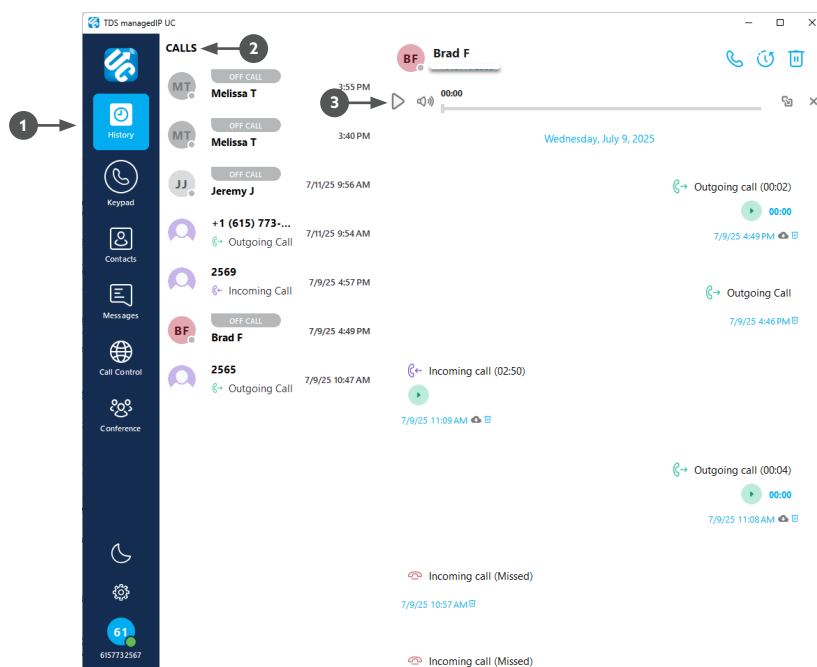
that the users get consent from the call participants before recording the call. Consult with the regulatory experts in your company before using this feature.

To start recording an active call, select the **Start Record**  icon on the right pane. The icon then changes to . Select this icon to stop the recording.

 **NOTE:** See the **Recording Options** section for more settings to record calls.

MANAGING CALL RECORDINGS

Once the calls are recorded, retrieve the recordings in the recent call history.



To access a call recording:

1. Select **History** (1) from the left navigation menu.
2. Under the **CALLS** pane, select the name or phone number you want to retrieve the recording.
3. Select the **Play Record**  (6) button to listen to the recording. The audio player displays at the top of the conversation pane.
 - Select  (2) to pause the recording. The icon then changes to . Select this icon again to resume.
 - Select **X** (3) to close the player.
 - Select  (4) to open the media player in a separate window.



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This player is then separated as a new window. Toggle this same icon to return the separated player to the conversation pane.

- Select  (5) to turn off the volume when playing the recording.
The icon then changes to . Select this icon again to unmute.

4. (Optional) Select  (8) to download and save the recording on your device.

 **NOTE:** To delete the recording, select  (7).

PLACING A CALL ON HOLD

Users can put a call on hold to pause the conversation so that none of the users or call participants can hear each other. To put a call on hold, touch the **Hold**  button on the call screen. The button then changes to . Touch this button again to resume the call.

CONFERENCE CALLS

You can add more people to an active call to form a conference call and talk to them in a single call.

ESTABLISHING A CONFERENCE CALL

Use **Add call**  to add more people to an ongoing call and make it a conference call. This way, you can talk to a group of people in a single call.

To form a conference call:

1. On an active call, select the **Add call**  icon.
The phone number field in the **Keypad** pane displays **Add call**.
2. Follow the steps in the **Making a Call** section to make a new call. The first call goes on hold.
3. Select the **Merge**  icon when the second recipient answers the call. The right pane indicates a conference call is formed.
4. To add more people, repeat steps 1 to 3.
5. To dismiss a conference call, select the **End Call**  button.

SPLITTING A CONFERENCE CALL

Use **Split**  to split a conference call into separate calls when some call recipients want to leave the conference to have a private conversation with you.

To split a conference call:

1. On an active conference call, select the **Split**  icon.
Below the **Split**  icon displays a list of conference members.



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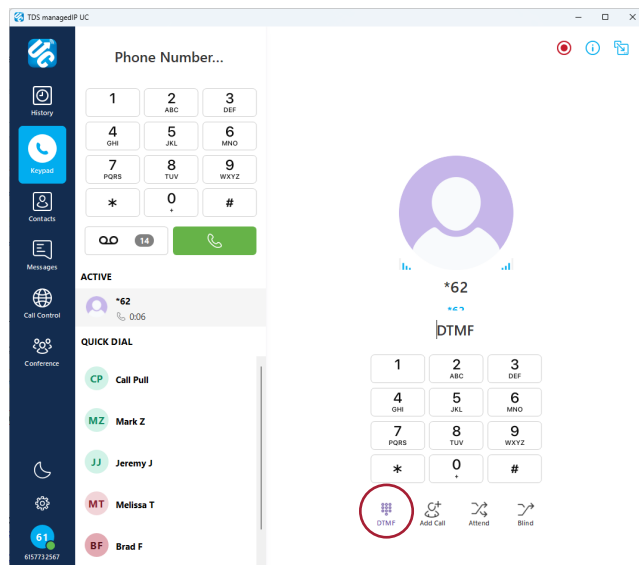
2. Select the name of the person you wish to remove from the conference.

NOTE:

- To rejoin a call back to the conference, select the **Merge**  icon on the pane of that active call pane.
- To speak with any call recipients, select the call below the dialer, and then select the **Resume**  button.

ENTERING DTMF DIGITS

Toggle the **DTMF**  icon to turn on and off the DTMF keypad (2). Dial the keypad to enter any inputs in a call.



To use the **DTMF** keypad:

1. On an active call, select the **DTMF**  icon. The DTMF keypad (2) displays.
2. Dial on the keypad as required.

The DTMF field (1) displays the dialed digit.

NOTE: Select the **Delete** icon to clear the field when needed.

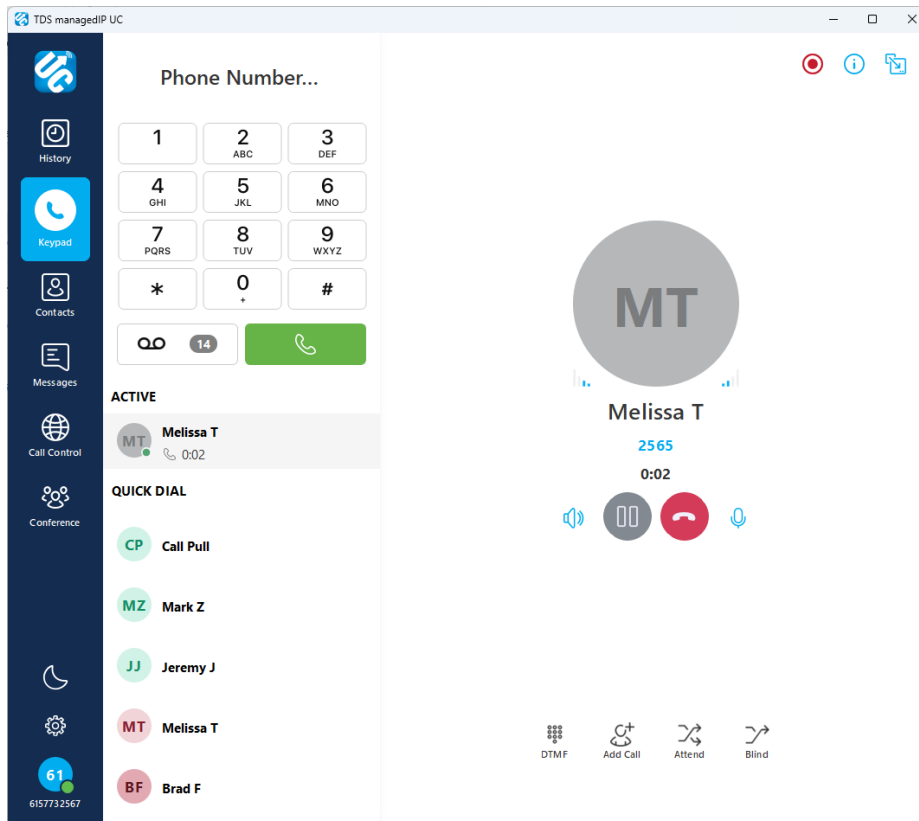
To close this DTMF keypad, select the **DTMF**  icon again.

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OPENING A DIALOGUE WINDOW

Use **Switch to Dialogue**  (2) to open a smaller dialogue box (1) that stays above other windows for an ongoing call.



On an active call, select the **Switch to Dialogue**  (2) icon. A dialogue box (1) of the call displays. This floating window, indicating this application has an active call, displays the caller's name and the duration of the call.

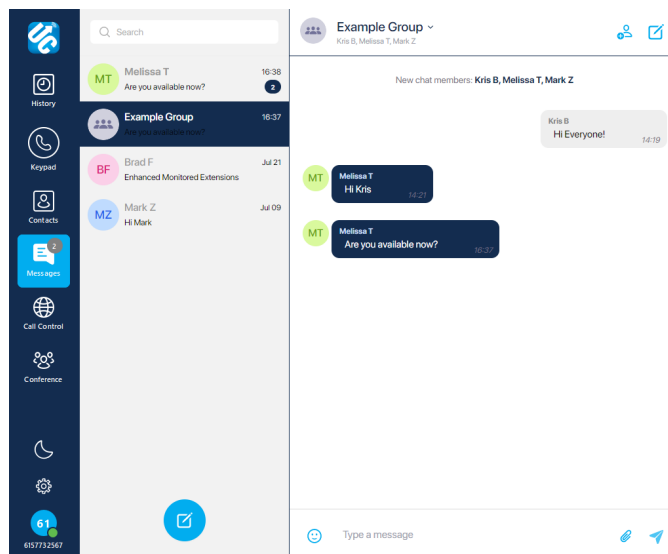
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CHAT MESSAGES

The users can exchange texts, files, and audio messages with other users using this application. Start a new conversation by selecting **Start Chat**  or send messages to the recent contacts by selecting one of the contacts in **Messages**.

 **NOTE:** The number in the dots indicates the presence of unread messages.



The **Message** tab provides a quick way to manage messages:

- Contains conversation history from the most to least recent below the **MESSAGE** pane.
- Exchanges text messages including attachments media files with other users.

USING CHAT

The users can use the chat feature to send instant messages to others instead of calling them.

Use the following steps to send a chat message:

New conversation

1. Select **Start Chat**  on the **Main** window.
2. Under the **New Chat** pane, select the contact.
The right pane displays the contact name and phone number.
3. Select the **Start Chat**  button.



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Recent interactions

1. Select **Messages** from the left navigation menu.
2. Under the **MESSAGES** pane, search and select the contact or phone number.

Existing contacts directory

1. Select **Contacts** from the left navigation menu.
2. Search and select the desired contact.
The right pane displays contact information.
3. Select the **Chat**  button next to the contact number.

After composing messages or attaching files, select **Send** .

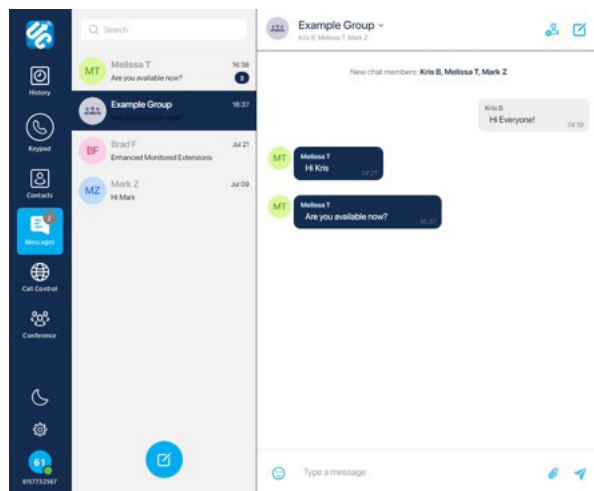
SENDING MESSAGES

The users can use the chat feature to send short text messages to others.

To send a message:

1. Select the **Messages** tab from the left navigation menu.

 **NOTE:** To start a new conversation, refer to the steps in the **Using Chat** section.
The **MESSAGES** pane displays.



2. Under the **MESSAGES** pane select the conversation.
3. Enter text in the text field.
4. Select **Send** .

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ENTERING SPECIAL ICONS

The users can add emoji icons in text messages.

Select the **Emoji** 😊 icon in the text field. Toggle this icon to close the emoji box.

1. Select an emoji.

MEDIA FILES

The users can exchange media files including documents, photos, videos, and audio files with other users. Also, they can download, delete, and forward these media files.

Transferring Files

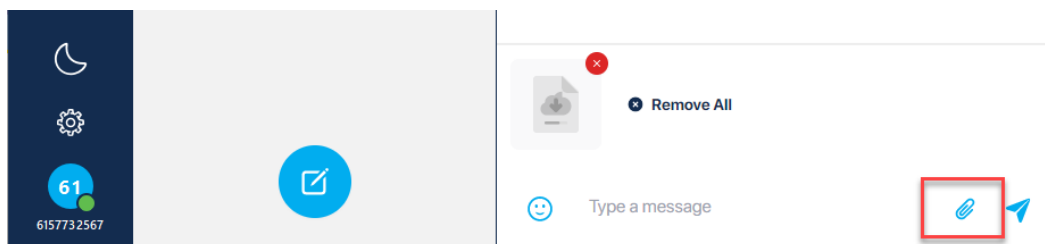
The users can send or attach media files to text messages using the chat feature of this application.

1. Select the **Attach** 📎 icon in the text field. A file explorer window displays.
2. Navigate to the location storing the files.
3. Select file(s) to attach.

The media file(s) are displayed above the text field.



NOTE: To remove any file, select the **Delete** ❌ icon before sending it out.



4. (Optional) Enter text in the text field.
5. Select **Send** ➡.

Managing Media Files

The users can download and or delete the media files in the conversation.

- Select 📄 to download and save the files to the host computer.
- Select 🗑 to delete the files.

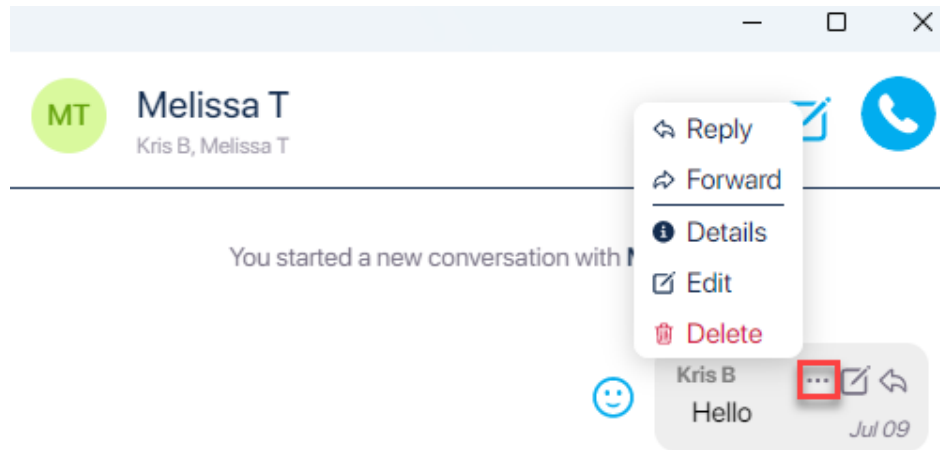
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DELETING MESSAGES

The users can delete specific messages, conversations, and all messages in the application.

IMPORTANT: The changes after deleting messages only reflect in the users' application, not in those of the recipients.



Deleting a conversation:

1. Select **Message** from the left navigation menu.
2. Under the **MESSAGES** pane, right-click the conversation.

✓ **NOTE:** Users can also select the **Trash**  icon at the top right corner on the right pane.

3. Select **Delete all messages**.

Deleting a conversation:

1. Select **Message** from the left navigation menu.
2. Under the **MESSAGES** pane, right-click the conversation.

✓ **NOTE:** Users can also select the **Trash**  icon at the top right corner on the right pane.

3. Select **Delete complete history**.

Deleting a message in a conversation:

1. Select **Message** from the left navigation menu.
2. Under the **MESSAGES** pane, select the conversation.
The conversation displays on the right pane.
3. Select  below the message.

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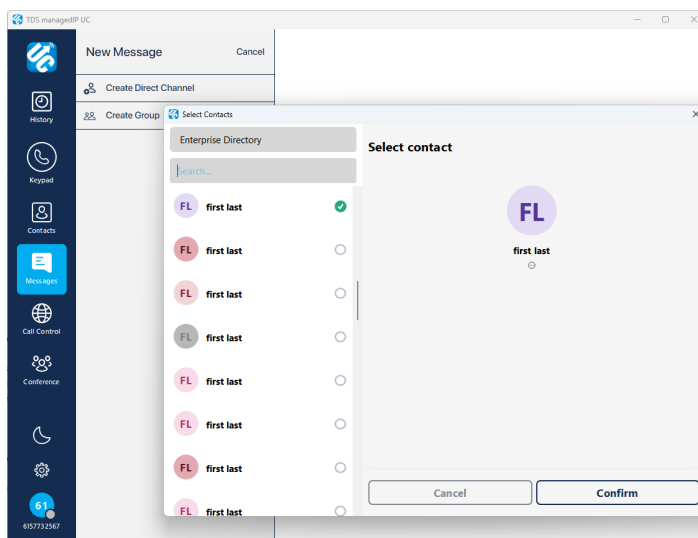
FILTERING MESSAGES

The **MESSAGES** pane contains a record of messages that the users send and receive. Select a contact and then the right pane displays the messaging history. The user can filter the logs to display the calls according to the type as needed.

1. Select **Messages** from the left navigation menu.
2. Under the **MESSAGES** pane, select the contact name. The right pane displays the conversation history.
3. Select the **Filter**  icon and then one of the following:
 - **All Messages** - displays messages only.
 - **Outgoing Messages** - displays the sent messages only.
 - **Incoming Messages** - displays the received messages only.
4. To restore displaying all logs, select the **Filter**  icon and then **All Messages**.

MULTI-PARTY MESSAGING

In the multi-party messaging **Chat**  tab, users can create one-on-one chats and collaborative group conversations, and send messages and media files to other users. Select the Compose **New Message**  icon to begin.



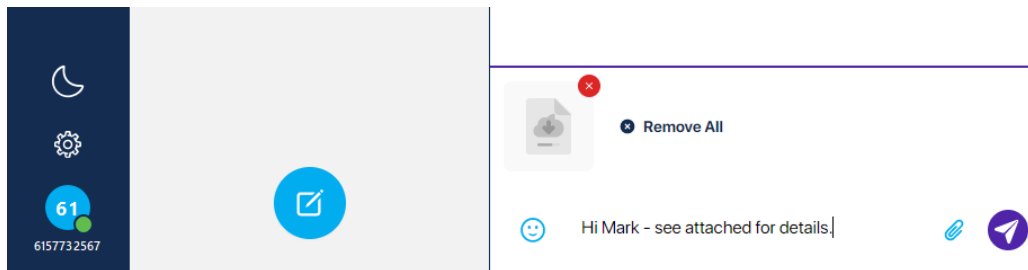
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SENDING DIRECT MESSAGES

Send direct messages to chat one-on-one with a user.

1. Touch  > **Create Direct Channel**.
2. Select the desired contact.
3. Select the **Confirm** button.
4. Enter text in the text field (3). Select the **Emoji**  (1) icon to include one in your message.



5. Touch **Send**  (4) after entering messages.
A timestamp (2) shows when the message is sent.

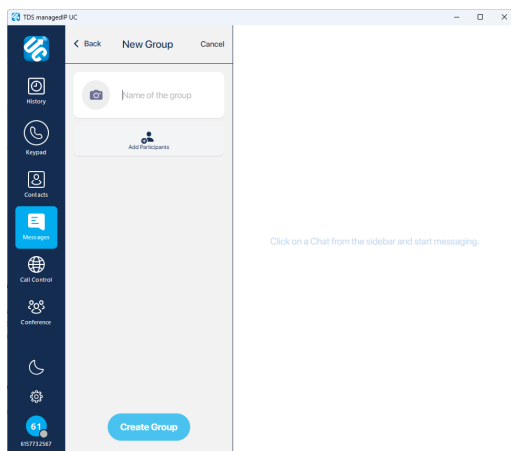
GROUP CONVERSATION

Use this feature to send messages to a larger audience with specific topics or recipients. You can create a group with up to 64 members.

Creating a Group Conversation

Give a meaningful name to the group and add relevant members.

1. Touch  > **Create Group**.
2. On the **New Group** pane:



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- Give a group name at the **Name of the group** field.

Select **Add Participants** , select group members from the contact list, and then select the **Confirm** button.

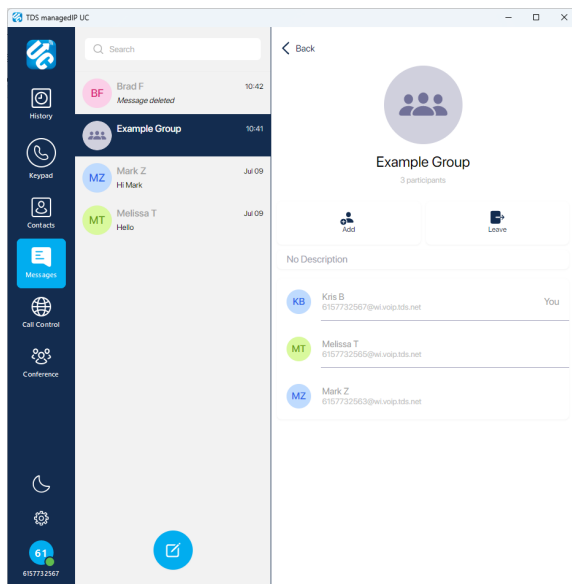
 **NOTE:** Users can change the group details afterward.
See the **Managing a Group** section for more details.

3. Select the **Create Group** button.
4. Touch **Send**  after entering messages.

Managing a Group

Give the group a clear description so members can understand its purpose. You can also edit the group name, add or remove members, and leave the group.

1. In the multi-party messaging **Chat**  tab, select the desired group conversation.
2. Touch the group name.
3. In the group details screen:



- To add more members, touch **add** , select members from the contact list, and then select the **Confirm** button.
- To remove a member, hover your cursor over the name. The **Delete** button displays. Select the **Delete** button, and then select the **Confirm** button in the confirmation window.
- (optional) Enter the group's purpose in this field.
- To leave the group, select **leave**  and then select the **Leave** button in the confirmation window.



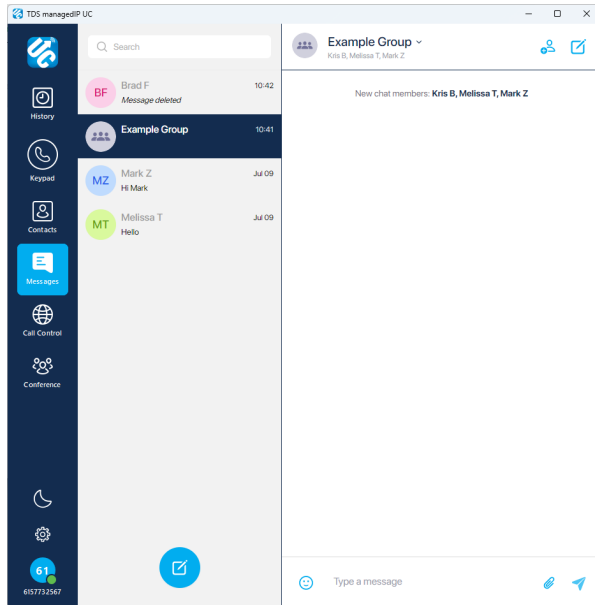
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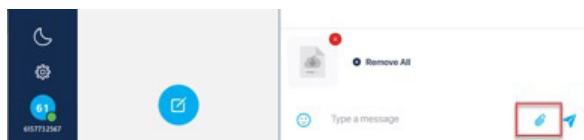
ATTACHING MEDIA FILES

You can send media files such as documents, photos, videos, and audio files in both direct and group chats.

1. Select .



2. Navigate to the location to open the media folder on the device. Select more files if needed.
The media files display above the text field.



3. (Optional) Enter a text message if needed.
4. To remove the file before sending it out, tap the **Delete X** icon.
5. Touch **Send** .

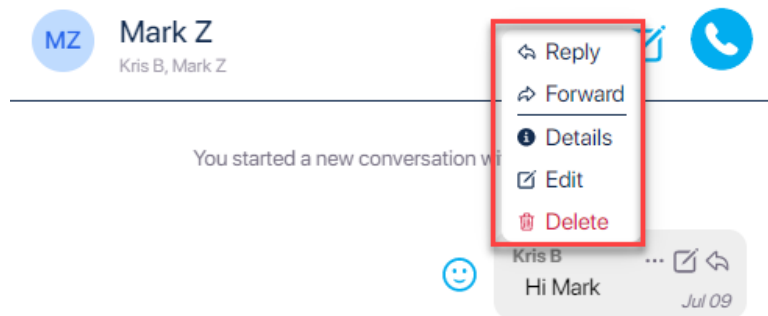
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EDITING MESSAGES

You can edit any message after sending it out.

1. Hover your cursor over the desired message. The **...** and **Edit** icons display.



2. Select the **Edit** icon, or select **...** > **Edit**.

3. Edit the message.

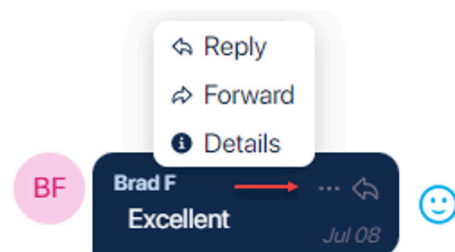
To cancel editing, select the **X** icon.

4. Select **✓**.

Replying to a Message

You can edit any message after sending it out.

1. Hover your cursor over the desired message. The **...** and **Reply** icons display.
2. Select the **Reply** icon. Or, select **...** > **Reply**.



3. Enter your message.

4. Touch **Send**.

Viewing Message Details

The **Message Details** window displays details of when the sent message is delivered or read by the recipient.

Tap on the message. Or, hover your cursor over the desired message, select **...** > **Details**.



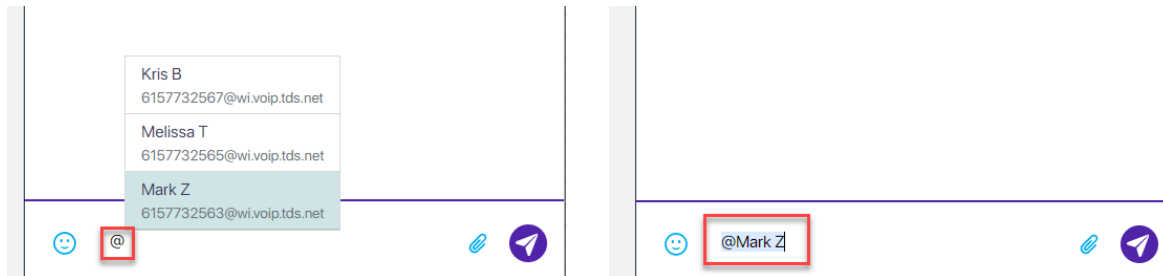
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MENTIONING A PERSON IN A GROUP

In a group conversation, you can mention a member's name to get their attention.

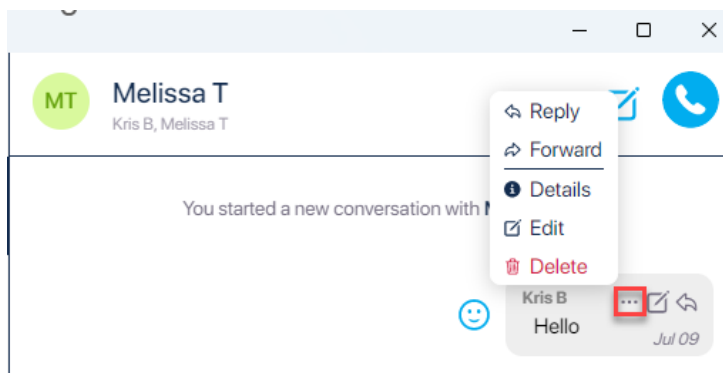
Type the @ symbol and select the contact's name from the list.



DELETING MESSAGES

You can delete a message after sending it out.

1. Hover your cursor over the desired message. The **...** icon displays.
2. Select **...** > **Delete**.



3. Select **Delete** in the confirmation window.

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COPYING CONTACT NUMBERS

The users can copy the phone number of a contact from the **Contacts** tab or the conversation history.

COPYING FROM THE CONTACTS DIRECTORY

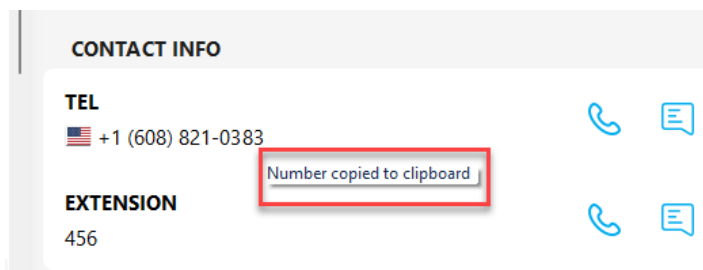
The **Contacts** tab has the contact number of a saved in the directory. The users can copy a phone number from this application and paste it into a text field.

1. Select the **Contacts** tab from the left navigation menu.

2. Search and select the contact.

The right pane displays contact information.

3. Right-click the contact information.



4. Paste the number of contacts to another location as required.

COPYING FROM THE CALL HISTORY

The **Recent** tab records the phone number or contacts who call the users. Copy a phone number from this application and paste it into a text field.

1. Select the **History** tab from the left navigation menu.

2. Under the **CALLS** pane, right-click on the conversation and select **Copy number**.

3. Paste the number of contacts to another location as required.

COPYING FROM THE MESSAGE HISTORY

The **Messages** tab records the phone number of contacts who send messages to the users. Copy a phone number from this application and paste it into a text field.

1. Select the **Messages** tab from the left navigation menu.

2. Under the **MESSAGES** pane, right-click on the conversation and select **Copy number**.

3. Paste the number of contacts to another location as required



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RECENT CALLS

Select **History** from the left navigation menu to view the recent calls.

The **History** tab provides a quick way to manage and track recent activities or interactions:

- Contains audio conversation history from the most to least recent in the **CALLS** pane.
- Displays the name and phone number, call type, call time, and call duration.
- Contains audio recordings (see **Managing Call Recordings** to access call recordings.)

CALL LOG ICONS

The icon in the conversation logs indicates the types of calls.

ICONS	INDICATION
	Received incoming call
	Outgoing call
	Missed incoming call
	Ongoing call
	Ongoing call

FILTERING CALL LOGS

The call logs contain a record of calls that the users receive, place, or miss. The right pane displays the call logs after one of the call histories is selected. The user can filter the logs to display the calls according to the type as needed.

1. Select **History** from the left navigation menu.
2. Under the **CALLS** pane, select the contact name. The right pane displays the call log.
3. Select the **Filter**  icon and then one of the following:
 - **All Calls** - Displays call logs only.
 - **Outgoing Call** - Displays calls the users make only.
 - **Incoming Call** - Displays calls the users receive only.
 - **Missed Call** - Displays the missed calls only.
4. To restore displaying all logs, select the **Filter**  icon and then **All Calls**.

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DELETING CALL HISTORY

Select **History** from the left navigation menu to access the call history. The users can choose to delete specific calls or all call history.

1. Under the **CALLS** pane, right-click on the conversation and select one of the following:

- **Delete all calls** - clears the call logs only.
- **Delete complete history** - clears all call logs under the **CALLS** pane.

2. On the **Confirmation** dialogue box, select **Yes**.



NOTE: You can also select the **Trash**  icon at the top right corner on the right pane to delete call history.

CONTACTS DIRECTORY

The contact directory has the phone number of a contact you save in the application, such as the quick dials, Enterprise and Outlook.

SEARCHING FOR A CONTACT

When you have many contact directories in the application, use the search function in **Contacts** to look for a contact.

1. Select the **Contacts** tab from the left navigation menu.
2. (Optional) Select the desired contact directory from the drop-down menu.
3. Select the **Search**  icon.
4. Enter a contact name in the search text field.
5. Select the desired contact.
The right pane displays the contact information.
6. Select the **Search**  icon to leave the contact searching mode.

ADDING QUICK DIALS

Create quick dials as a shortcut in the **Contacts** tab for frequently called contacts. The quick dial contact also displays underneath the dialer in the **Keypad** tab.

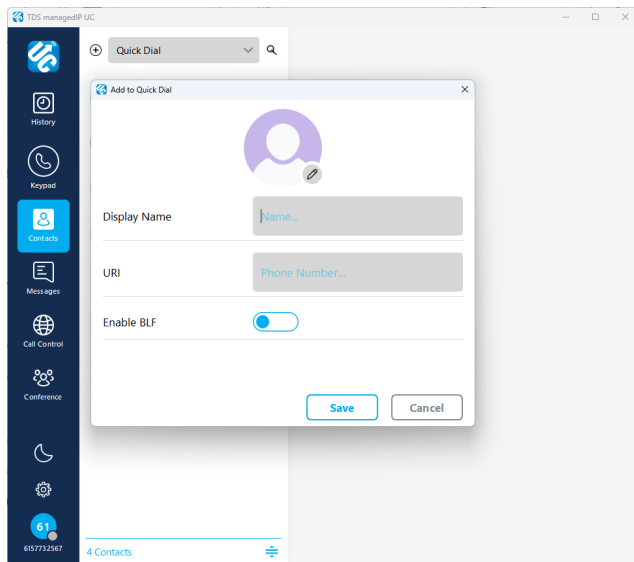


NOTE: By default, a Quick Dial for Call Pull has been added for your convenience. Call Pull can be used to seamlessly move an active call on your mobile application to your desktop with just a single click.



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1. Select the **Contacts** (2) tab from the left navigation menu.
 2. Select the **Add** ⊕ (1) icon beside **Quick Dial** (3). An **Add a quick dial** window (4) displays.
 3. Enter a contact name (7) and phone number (8) in the fields.
 4. Toggle **Enable BLF (Busy Lamp Field)** to monitor that users on call status.
- ✓ **NOTE:** BLF in-call status is only applicable to contacts in your Enterprise Directory.
5. Select the **Edit** ✎ (6) icon to assign an avatar to a quick dial contact.
Select **Cancel X** (5) to remove the added avatar.
 6. Select the **Save** button (9).

EDITING QUICK DIALS

When the names or phone numbers in **Quick Dials** need changes, update them in the **Contacts** tab.

1. Select the **Contacts** (2) tab from the left navigation menu.
2. Right-click the contact. An option menu displays.
3. Select **Edit**.
An **Edit Quick Dial Entry** window display.
4. Make changes as required in the text fields.
5. Select the **Save** button.

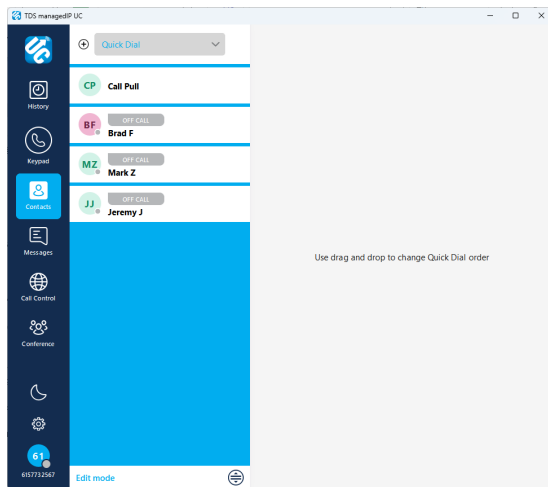
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CHANGING THE QUICK DIALS ORDER

When a new quick dial is created, it is added to the bottom of the Quick Dial list. Rearrange their orders based on priority.

1. Select the **Contacts** (2) tab from the left navigation menu.
2. Select the **Reorder** ≡ (10) icon.
3. Select and hold the contact's name, then drag it to the desired position.



4. Select the **Reorder** ≡ icon again to exit the Edit mode.

DELETING QUICK DIALS

When contact(s) in **Quick Dials** no longer exists, remove them in the **Contacts** tab.

1. Select the **Contacts** (2) tab from the left navigation menu.
2. Right-click the contact. An option menu displays.
3. Select **Delete**.
4. Select **Yes** on the confirmation window.

DO NOT DISTURB MODE

Do Not Disturb mode controls how and when to receive calls, messages, and notifications.

When the user sets the status to **Do Not Disturb**:

- Incoming calls do not ring.
- Callers see **Busy** on their calling pane when they call the user.
- Able to receive chat messages without notifications.
- Able to make outgoing calls.



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SETTING DO NOT DISTURB

Turn on **Do Not Disturb** mode when you want to reduce possible distractions from calls and messages.

Select the **Busy**  icon from the left navigation menu. The icon then changes to . Toggle this icon to turn on and off **Do Not Disturb** mode.

ICONS	INDICATION
	Do Not Disturb mode inactive
	Do Not Disturb mode active

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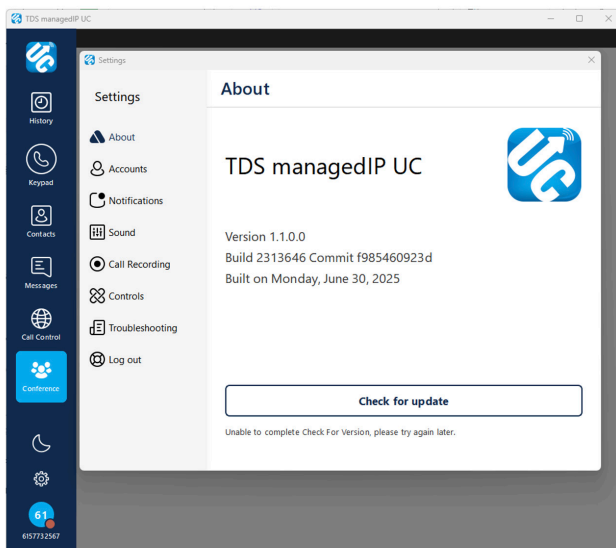
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Settings

This chapter describes the settings on this softphone desktop application. Select the  icon from the left navigation menu to open the **Settings** window.

SETTINGS WINDOW

The **Settings** window has a left navigation menu (1). When one of the settings from the left navigation menu is selected, more details or the current settings are displayed on the right pane (4). Select the **X** (3) icon to close this window.



SETTING ACCOUNTS OPTIONS

Users sign in to the application with the system administrator-provided account credentials. Select **Account** from the Settings navigation menu to configure the application account.

1. Select  > **Settings**.
2. Then select **Edit**.
3. To configure **Call Control**, select **Options**.
4. Make necessary changes.
5. Select the **Save** button.
6. Close the window.

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NOTIFICATIONS SETTINGS

Select **Notification** from the **Settings** navigation menu to select the sound to play for an incoming call or message.

- **Ringtone** - Select a sound to play for all incoming calls.
- **Text tone** - Select a sound to play when a message is received.

AUDIO SETTINGS

Select **Sound** from the **Settings** navigation menu to configure audio devices and media settings.

- **Microphone** - Select a microphone input device.
- **Microphone volume** - Controls the microphone input volume during a call.
- **Microphone gain** - Controls the amplification applied to your audio input for the sound signals.
- **Speaker** - Select an audio output device.
- **Playback volume** - Controls the audio output volume.
- **Playback gain** - Controls the amplification applied to your audio output for the incoming sound signals.
- **Ringtone audio output** - Select the audio device to play the incoming call ringtone.
- **Ringtone volume** - Controls the call ringtone volume.
- **Keypad volume** - Controls the volume when keys on the dial pad are pressed.
- **Mute other apps during call** - When enabled, notifications from other applications are muted during calls.
- **Incoming audio noise suppression** - Select the background noise elimination level when you speak.
- **Outgoing audio noise suppression** - Select the background noise elimination level when others speak.
- **Echo cancellation mode** - Select the microphone and speaker conditions to minimize echo.
- **Enable headsets integration** - Enable or disable to integrate headsets in calls.
- **EPOS port** - Set the port used for communication with EPOS (Sennheiser) headsets. The default is 8001.



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- **Advanced sound setting** - Select the Advanced button.

- **Record audio data** - When enabled, the audio data of all active calls are recorded for troubleshooting purposes. To retrieve the data, go to the file path at C:\Users\<user>\AppData\Local\<app_id>.storage\Temp\Recordings.



NOTE: <user> denotes the username of the host computer and <app_id> denotes the name of this softphone application.

- **Remember device-specific sound preferences** - Enable or disable (default) the application to save sound preferences specific to each audio device.
- **Audio capture buffer timeout** - Select a period to buffer the audio data after being captured from the microphone.
- **Playback audio buffer timeout** - Select a period to buffer the audio sound before playing through the output device.
- **AEC sound card latency** - Select a delay to the Acoustic Echo Cancellation (AEC) to minimize echoes in audio calls (default - 100 ms).
- **Audio fragmentation** - Select the audio packet size in milliseconds and bytes. The default setting is server default which uses the predefined server setting. Only consider changing this setting when your network has low bandwidth.



NOTE: Close and open this application again if you change this feature.

- **Use default sound format** - Turn this on to save the audio files in Microsoft's Waveform (.wav) format when this application records calls. When disabled, this application uses a predefined format with pulse-code modulation (PCM) method, 2 channels, and 16 bits per sample.



NOTE: This is enabled by default. Turn this off only if you experience audio issues using non- standard audio devices, such as microphones with multiple audio channels.

- **Use system sample rate** - Enable this setting to use the audio device sample rate for audio, or disable it to use a 16 kHz sample rate (default - enabled).
- **Use audio categories for microphone input** - Enable or disable this setting for the system to prioritize microphone input during calls over other audio types (default - enabled).
- **Allow microphone enhancements** - Turn this on to allow the operating system to improve the sound quality of your audio input devices.
- **Allow speaker enhancements** - Turn this on to allow the operating system to improve the sound quality of your audio output devices.
- **Microphone audio buffer capacity as a time value** - Set the duration, in milliseconds, for which the microphone audio data is buffered (default -100 ms).



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RECORDING OPTIONS

Select **Call Recording** from the **Settings** navigation menu to configure the call recording settings.

- **Record all calls** - When enabled, all phone calls are recorded (default - disabled).
- **Automatically delete recordings** - Select the period to keep call recordings or to keep them forever.
- **Warning beep** - When enabled, a beep occurs every 15 seconds in recorded active calls.

CONTROLS SETTINGS

Select **Controls** from the **Settings** navigation menu to configure call settings for this application.

- **Launch at login** - When enabled, this application opens once the users log in to the computer (default - disabled).
- **Log SIP traffic** - When enabled, all the SIP traffic logs are recorded. See the Accessing SIP Logs section to open the (default - disabled).
- **Incoming call alert mode** - Select to control the display notification for all incoming calls from this application. Note: The incoming call ringtone plays.
 - **Notification and app into foreground** - Allow both the Incoming Call window and a notification prompt to display on the screen.
 - **Notification only** - Allow a notification prompt to display on the screen.
 - **Disabled** - Do not allow any display notification.
- **Set as a default calling app** - Opens the Settings window in the host computer to set this application as the default to answer all calls.
- **Language** - Select the application language. The default follows your computer's operating system settings. Other options are available (Arabic, Danish, Swiss German, German, English, Spanish, Belgian French, Canadian French, French, Hebrew, Indonesian, Italian, Japanese, Korean, Malay, Norwegian, Dutch, Polish, Brazilian Portuguese, Portuguese, Russian, Swedish, Thai, Turkish, Vietnamese, Simplified Chinese, Traditional Chinese).
- **Always on top** - When enabled, this application displays above other applications on the screen (default - disabled).
- **Launch setup wizard** - Opens the **Welcome Wizard** window to allow this application to use the camera, speakers, and microphone.



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ACCESSING SIP LOGS

The application generates and records the SIP traffic log when the **Log SIP traffic** option in **Controls** is enabled. The log is used for troubleshooting purposes.

1. Select .
2. On the **Settings** window, select **Troubleshooting** to access troubleshooting logs.



NOTE: **Troubleshooting** is visible after enabling the **Log SIP traffic** option in **Controls**.

3. To retrieve a copy of the log, under **SIP LOG**, select the **Export** button next to the **Export SIP log** option. A **Pick save location** window displays.
4. Save the log and send it for troubleshooting if needed.

SIGNING OUT OF THE APPLICATION

Your call logs, messages, quick dials, settings, and additional contact sources, such as Office 365 and Google accounts (if applicable), remain in the app after signing out and signing back in.

Touch  > **Settings** > **Log out** to sign out from the application.

To log back in, follow the steps in the **Signing in to the Application** section.

