Fuze Desktop/Web Softphone

Fuze Enablement Team

Softphone Training Objectives

After attending this training, users should have a basic understanding of:

- Application overview, signing in, and desktop layout

- Setting presence status, signing out, and accessing help

- Softphone functions including call management and voicemail list

- Configuring settings

- Utilizing Queues

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Softphone Application Overview

Overview

Fuze Desktop and Web softphone offers the ability to place and receive phone calls from anywhere there is an internet connection.
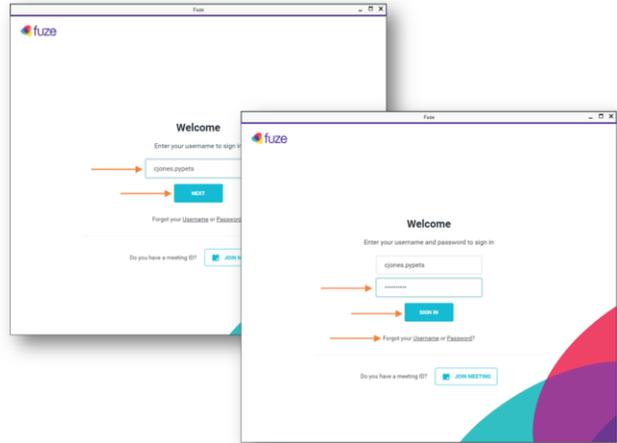
New users will receive a **Get Started** message upon signing into Desktop. A **Setup Checklist** will appear in Fuze Desktop allowing the user to make a test call, choose the preferred device for making calls, the ability to add a picture, connect Google or Office 365 accounts to import contacts and calendars, and the option of setting up voicemail.

In Fuze Web, the **Setup Checklist** will include options to choose a preferred device for making calls, adding a profile picture, and connecting a Google and/or Office 365 account to import contacts and calendars.

If the username has been forgotten, the work email address will be used for retrieval. If the password has been forgotten, a magic link will be sent to the users registered email address, in order to reset it.

Click the **I AGREE** button to acknowledge the **Emergency Services** notice. Any questions regarding the user's registered location details should be directed to the local Fuze Administrator.
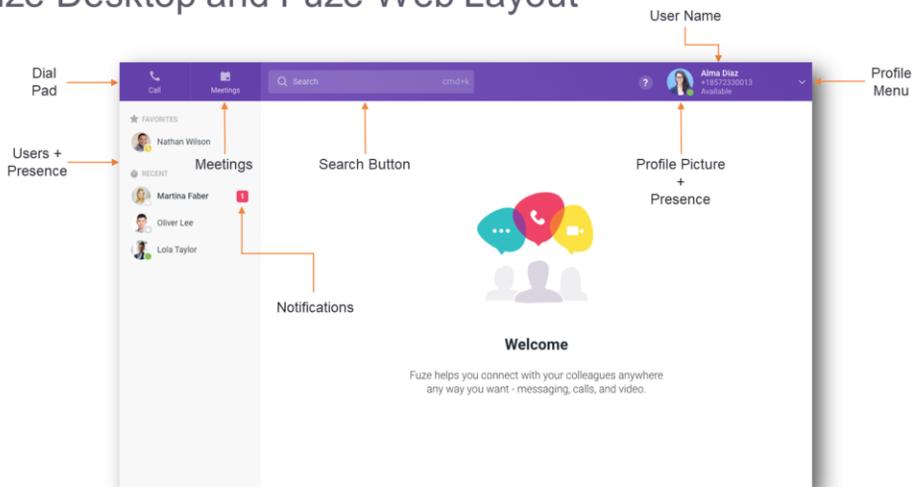
Fuze Desktop offers the ability to re-size the screen and make it smaller by clicking on the Restore button in the upper-right of the screen. Once made smaller, a user may drag and move Fuze Desktop anywhere on the screen. Fuze Desktop will automatically collapse the sidebar to showcase more of the content on the screen.

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Setting Presence Status

Status describes current availability.

- Click the profile dropdown menu and then click the **Current Status** dropdown
- Select the applicable status option
- Optionally, click the ✏ icon, enter custom message details, and then click the ✓ icon
- Click the **Do not disturb** toggle to decline incoming calls and mute notifications

fuze tip Manually setting presence will override all other presence options.
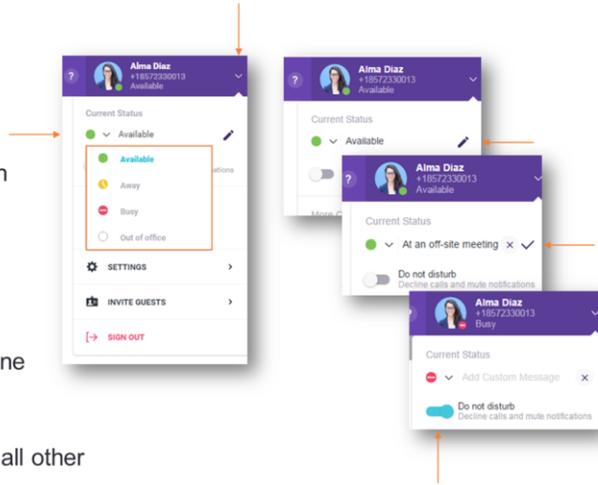
When on a phone call, the status indicator will change to **Busy** with a message of **On a call**. When in a Fuze Meeting, the status will change to **In a Meeting.** When the toggle is turned on for a Google or Office 365 calendar event, the status will be set to **Busy**. After 20 minutes of inactivity, Fuze Desktop will automatically change the status from **Available** to **Away**.

Accessing Help and Signing Out

The help feature allows a user to interact with Fuze or view application information.

- Click the ? icon
  - GET SET UP
  - WHAT'S NEW IN FUZE?
  - GET HELP ONLINE
  - SEND US YOUR FEEDBACK
  - REPORT A PROBLEM
  - CHECK FOR UPDATES
  - FUZE CHECKUP

Signing out will set the user's status to offline.

- Click the profile dropdown menu

- Select SIGN OUT
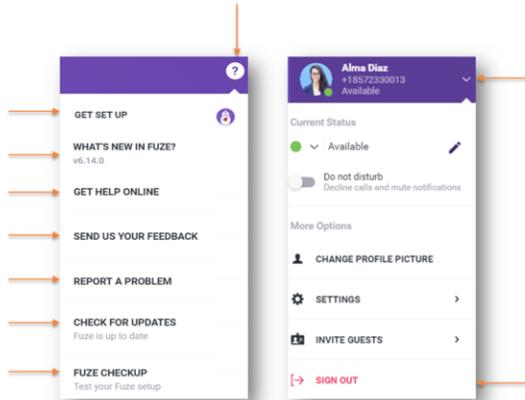
9   Copyright 2021, Fuze

GET SET UP - allows the user to make a test call, choose which device will be used to initiate calls from Fuze Desktop, add a picture, set-up voicemail, or connect accounts

WHAT'S NEW IN FUZE? - provides a list of new features or bug fixes

GET HELP ONLINE - directs a user to the Fuze Help Center page (https://help.fuze.com) for the most recent product resources

SEND US YOUR FEEDBACK - allows a user to submit feature suggestions for upcoming releases

REPORT A PROBLEM - allows a user to report a Fuze Desktop problem

CHECK FOR UDPDATES - allows a user to upgrade to the latest version of Fuze Desktop

DOWNLOAD FUZE DESKTOP (Fuze Web Only) – directs a user to https://www.fuze.com/download, where there is the ability to download the desktop application for Windows or Mac

FUZE CHECKUP – confirms a users account and network conditions will reliably support placing calls and participating in meetings

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A search may also be performed by phone number or extension.

Managing an Active Call

- Hover over the 📶 icon to view information about the call connection
- Click the 👤 dropdown window to **Add To Call**
- Click the 🔊 dropdown menu to **Choose an audio device**
- Click the 💬 icon to send a message
- Click the ⓘ icon to view contact insights
- While on a call, the following options are available:

Mic, Video, Share, Dial Pad, Hold, Hang Up

Oliver Lee
Pyramid Pets - Pyramid Pets Training
Work - +18572330669
00:55

Transfer
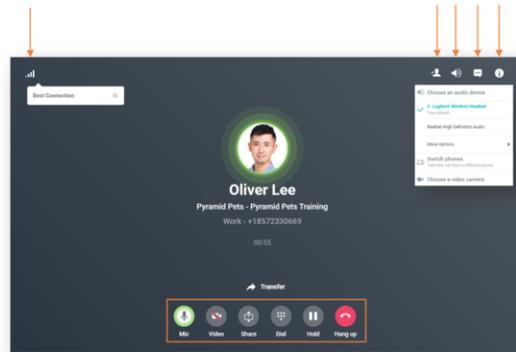
The ability to share screen or video is only available when in an active call with another Fuze Desktop user. If a call needs to be placed from a shared line, click the profile menu and choose the phone number the call needs to be placed from. A green indicator will highlight the current speaker in both the Fuze call screen, and the mini controller.

Receiving Calls While Active

- Click either the 📞 or 📞 icon to answer an incoming call
- Click either the 📞 or 📞 icon to reject a call or the ⊗ icon to ignore
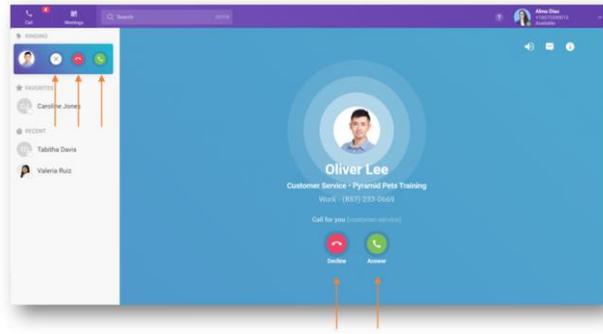
Fuze Desktop becomes active once a user clicks within the application and becomes inactive when a user clicks outside the application window. There is also the ability to answer an incoming call with a headset. Fuze currently supports approved Logitech, Plantronics, and Jabra headsets for use with Fuze Desktop (a list of Fuze-supported headsets can be found at https://help.fuze.com).

Receiving Calls While Inactive

While outside of Fuze Desktop, a comms control window will appear.

- Click the 📞 icon to answer a call

- Click the 📞 icon to reject a call

- Click the ⊘ icon to ignore a call

- Click the ⊞ icon to expand the incoming call screen
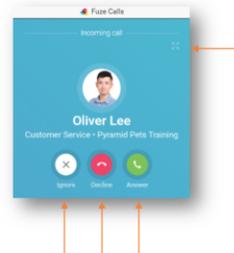
fuze tip   The floating comms control window can be moved to a preferred location on the screen.

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Within Fuze Web, a pop-up notification appears on the right-hand side of the screen with the option to answer the call.

Controlling Calls While Multitasking

User has full call control when outside of Fuze Desktop or when chatting in Fuze Desktop.

- Click the ▦ icon to expand the active call screen and bring Fuze Desktop to the forefront

- Click the 🔊 icon to view **More audio options** for the call

> 🔶 fuze tip
>
> Incoming calls while on an active call will appear below the comms control; answering the call will place the initial caller on hold.
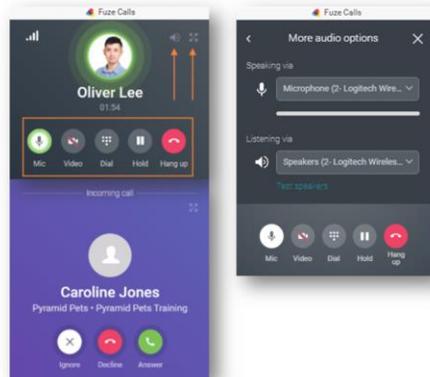
Clicking outside of Fuze Desktop will bring the comms control window back on the screen. The comms control window can hold up to five voice calls and one meeting (Fuze Desktop Only).

To record an active call, click the **Dial Pad** and then click *3. Enter *7 to pause or resume recording of a call. Recording capabilities will need to be configured by a local Fuze administrator.
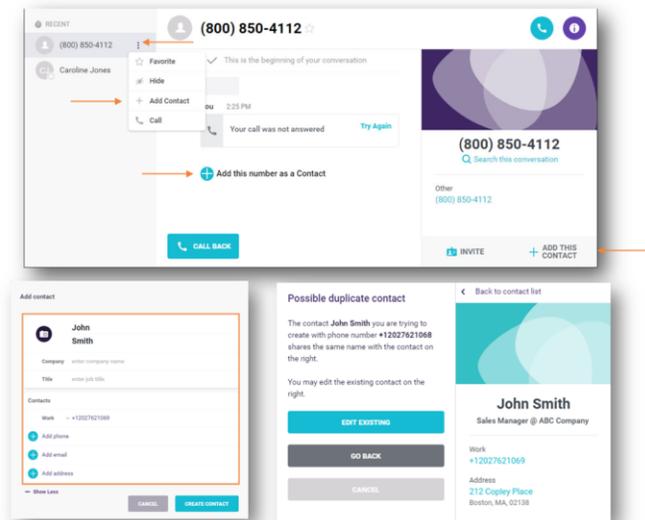
Fuze informs a user of duplicate names or phone numbers. Added contacts will be synced to Fuze Mobile. A profile image can be added to the new contact by clicking the camera icon to the left of the name fields.

There is the ability to edit and delete contacts, once the contact has been created.

Managing the People List

A user will have the ability to manage contacts and unknown phone numbers listed on the people list.

- Click the ellipsis in the recent people list to move a contact to the **Favorite** list, **Hide** the contact from the recent people list, **Call** the contact, or create a **Video Call** with the contact

To unhide a contact, search for and click the contact's name.
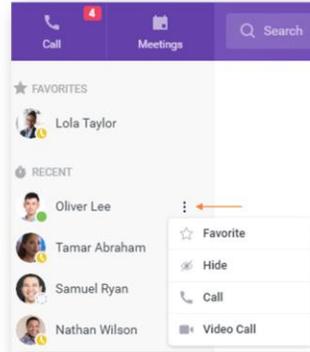
Initiating Video During an Active Call

Video will be available to share while on a call with an internal contact. To share video:

- Click the ⬛ icon

- Click the ⬛ icon again to stop sharing video

🎨 **fuze tip** A preview of the shared video will appear in the top right corner of the screen; click the arrow icon to minimize this window.

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Sharing video will only be available when on an active call with another Fuze Desktop user. During video sharing, a **More** button will appear with the option to **Transfer**, **Merge**, or utilize the **Dial pad**.
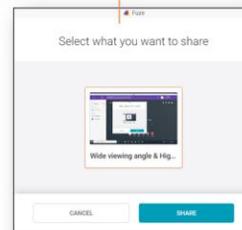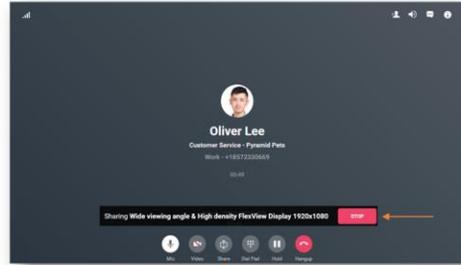
Screen sharing will only be available when on an active call with another Fuze Desktop user. During screen sharing, a **More** button will appear with the option to **Transfer**, **Merge**, or utilize the **Dial pad**.

Performing a Transfer Now

Transfer Now allows a call to be transferred without speaking to the recipient first.

- Click the **→ Transfer** icon to transfer a call unattended

- Type the name, extension, or number in the search field

- Hover over the contact and then click the ● icon to **Transfer now**
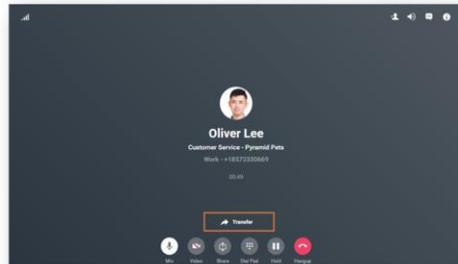
fuze tip To transfer to a number not in the directory, enter the number in the search field and then click the ● icon.

fuze
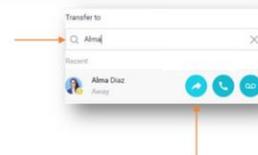
With a **Transfer Now**, the recipient of the call will see the original caller's ID.

A pop-up will appear in the upper-right portion of the screen, informing the user of transfer status.

Performing a Call First Transfer

To transfer a call and speak to the recipient first:

- Click the **Transfer** icon

- Type the name, extension, or number in the search field

- Hover over the contact and then click the icon to **Call first**
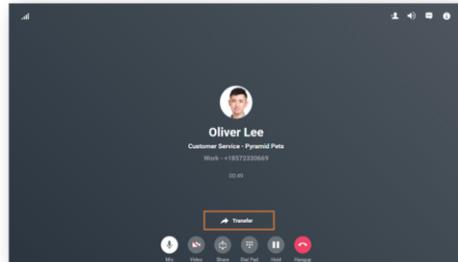
When transferring to a "Fuze Room" or a Fuze meeting, the call may be transferred utilizing the **Transfer Now** option or the **Call First Transfer**. If utilizing a **Transfer Now**, the user will enter the dial in number, and then select the transfer button (meeting ID number would be required). A **Call First** Transfer allows the user to enter the meeting ID number, then press transfer and the call will transfer directly into the meeting as a dialed in participant.

A call may also be transferred to a Conference Room. If utilizing a **Transfer Now**, the user will enter the conference bridge number, then transfer the call. The caller would then be prompted to enter the conference room number and the access code to enter. In a **Call First Transfer**, the user is allowed to enter the conference room number and the access code for the caller, press **Transfer** again and the call will be sent into the conference room.

A pop-up will appear in the upper-right portion of the screen, informing the user of transfer status.

Completing a Call First Transfer

To complete the transfer:

- Click the 🔀 button after speaking with the receiving party

fuze tip To cancel the transfer, click the 🔴 icon next to the receiving party's name and then click the 🟢 icon to resume the original call
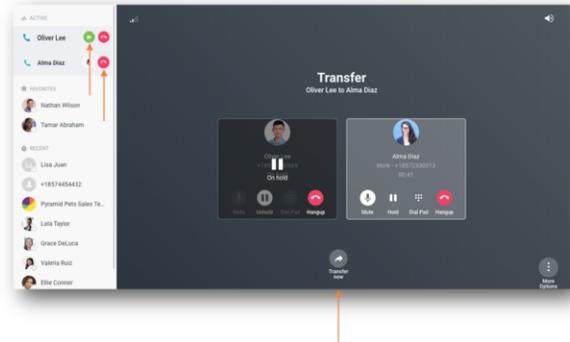
Transfer Now will transfer the caller immediately to the receiving party.
More options will provide the ability to view contact insights or chat with the user currently on the active call.

Send to voicemail will only appear for internal contacts. A pop-up will appear in the upper-right portion of the screen, informing the user of transfer status.

Merging Calls

Merging calls allows an active caller and a caller on hold to be merged.

- Click the ⇥ Merge icon

- Click on the name or number that is currently on hold

- Click the MERGE button

- Click the 👥 button to add a person to the call

fuze tip A total of two additional participants can be added to a merged call.

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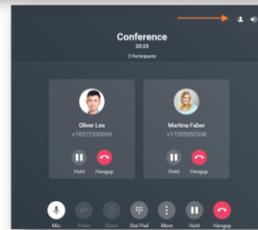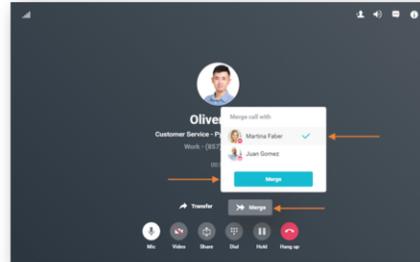
Creating an Audio Conference

An audio conference call allows multiple participants to be joined on a single call.

- Click the 👤 icon while on an active call

- Enter the name or phone number for additional participants to be invited

- Click on the name or number and then click the `CONFIRM` button

🔴 fuze tip A maximum of five participants are allowed in an audio conference.

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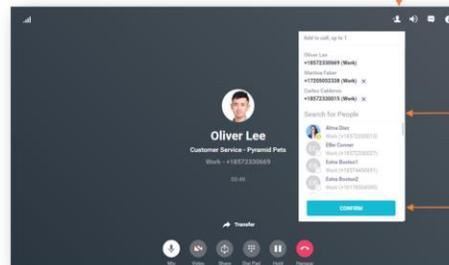
Messaging a Contact During an Active Call

To message a caller during an active call:

• Click the 💬 icon
    - The message panel will open

• Enter text in the message field and click the SEND button, or press Enter to send

fuze
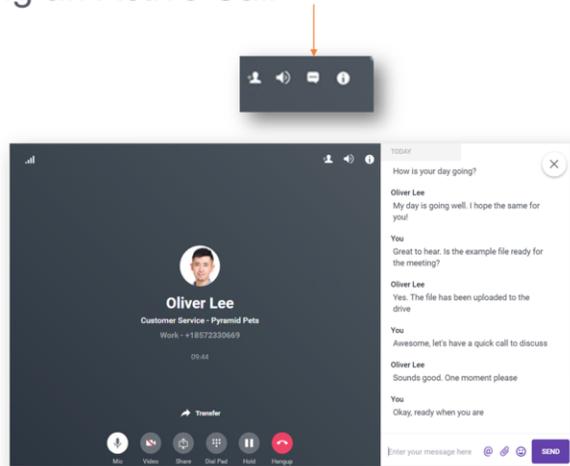
Messaging Another Contact During an Active Call

To message another user during an active call:

- Select the **Search** button

- Search for a user

- Hover over the user and click the 💬 icon

- Enter text in the message field and click the **SEND** button, or press Enter to send

fuze tip To return to the active call, click the caller's name within the **ACTIVE** list.

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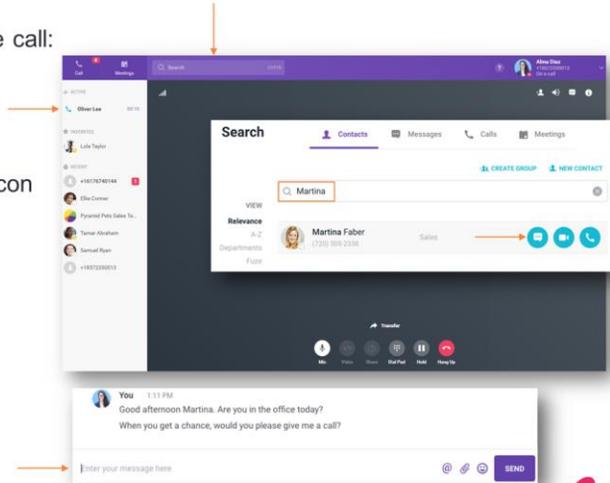
Sending a Short Message Service (SMS) – US & Canada Only

SMS allows messages to be sent to external phone numbers. To send an SMS:

- Click the **Search** button and then type a contact name or number in the search field

- Hover over a contact and then click the 🔵 icon

- Click the Send as: IM ⌄ dropdown and then select **SMS**

- Enter text in the message field and then click the **SEND** button or press Enter to send

🎈 fuze tip — To manually send an SMS to any US number, click the 📞 icon, enter the phone number, and then select the 🔵 icon.
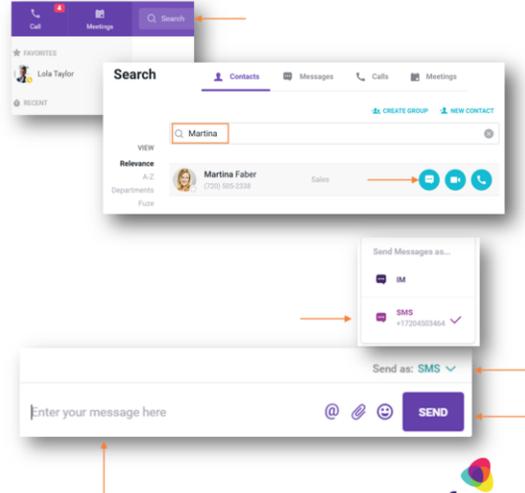
SMS is only available in North America (US and Canada) and requires an additional license. Multi-Media Messaging Service (MMS) is also available to all users with an SMS license.

Switching Devices During an Active Call

To switch an active call from one device to another:

- Click the 🔊 button

- Click **Switch phones**

- Click **RING ALL OF MY PHONES** to ring all Fuze-enabled phones

  - The caller will be placed on hold

- Answer the device on which to continue the call
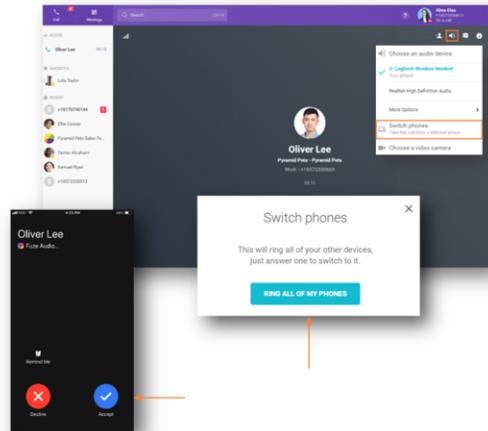
When a user clicks **RING ALL OF MY PHONES**, the person on the other end will be on a silent hold until the user answers the paired device. If the call is not answered, then the person on the other end will hear the 20 second ring, until it is automatically routed to the voicemail.
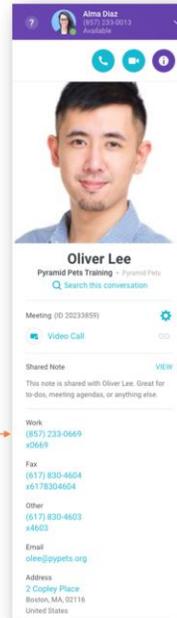
Contact information that may be seen includes: name, company, department, work address, work phone number, mobile number, and email address.

Accessing Call History

To view call history from the search field:

- Click the **Calls** button

- View a list of **All Calls** by default or click **Missed Calls**

- Hover over a contact and then click the handset icon to call

The Call History can also be accessed from the **Call** icon.
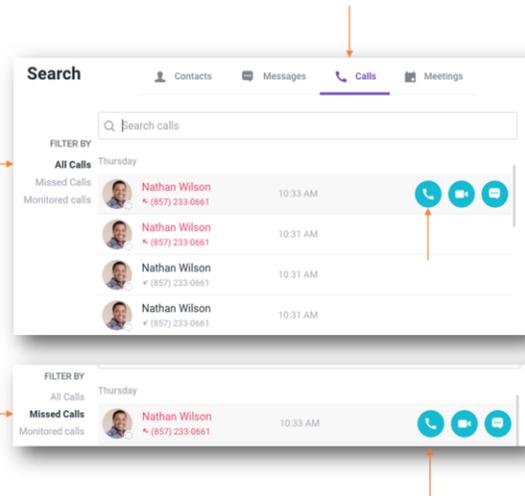
Viewing the Voicemail List

- Click the [Call] icon
- Select **VOICEMAIL LIST**
- Hover over a voicemail
- Click the 🗑 button to permanently delete the voicemail
- Click the ⬇ button to download the voicemail as a .wav file
- Click the ▶ button to play the voicemail
  - Voicemail will play within the application
- Click the ✕ icon to close the page

fuze tip New voicemails will show a **New** icon.
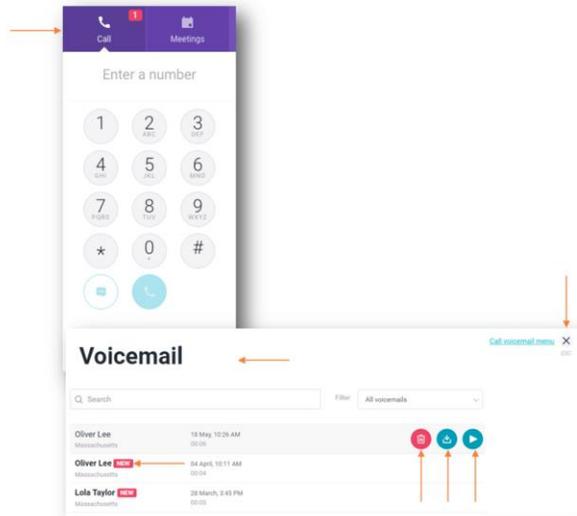
A user may click the **Filter** dropdown to filter by **All voicemails** or **New voicemails**. There is the ability to search for a specific voicemail by clicking in the **Search** field and then typing the name of the chosen voicemail to view.
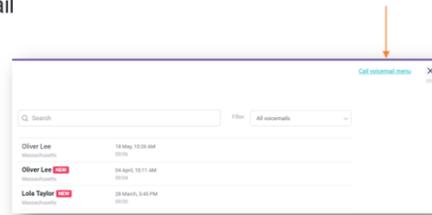
Call voicemail menu takes a user directly into the voice message system, which allows changes to the greetings or access to additional voicemail features.

Initial voicemail configuration:

- Access the message center

- Enter temporary PIN when prompted (extension)

- Follow prompts to record name and standard greeting (busy message is not necessary)

- Create a new permanent PIN (new PIN must be 4-15 digits, cannot be the same as the extension number, a replicated digit (1111), or sequential digits (1234))

The Voicemail Setup Guide can be found in the Help Center: https://help.fuze.com/hc/en-us/articles/360010964173-Voicemail-Setup-Guide

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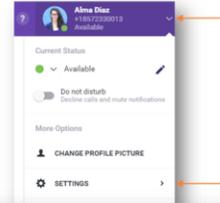
Place my calls using (this app) will be the default setting.
Clear unknown calls removes unknown numbers, allowing user to manage how long these numbers stay in the sidebar.

Must first be configured by Fuze.

Use of **Advanced Options** is currently available on Fuze Desktop only.

Use the buttons on your headset to answer and control calls - gives Fuze permission to capture events from connected headsets (utilizes HID Integration). Some headsets have buttons which allows a user to answer the call, hang-up, and mute/unmute. When this feature is enabled, Fuze will capture the event and if the feature is disabled, Fuze will not capture those events to accept, hang-up, or mute a call

Acoustic echo cancellation - improves voice quality by preventing echo from being created or removing it after it is already present

Automatic gain control - automatically adjusts the microphones sensitivity based on common heuristics, e.g., intelligently adapts the microphone sensitivity based on where participants are seated, making the conversations clearer for all participants

Users may click the **CHANGE A/V SETTINGS** button to be taken back to the **Audio/Video** configuration page.
Highlight the Fuze Icon in the Windows system tray or **Bounce the Fuze icon in the MacOS dock** is a Fuze Desktop Only feature.

Importing Contacts

Contacts can be added by connecting additional accounts with Fuze Desktop to import personal contacts and contacts within a corporate directory.

From the **Settings** options:

- Click **Connected accounts**

- Click the ⬜ toggle for [G Google], [Office365], or [Salesforce] to import contacts from these accounts

fuze tip Accounts and associated contacts will be displayed under **Search** > **Contacts**.
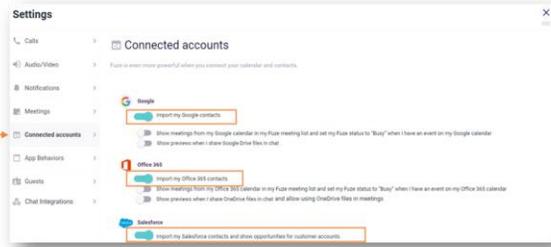
When connecting to a Google or Office 365 account, a user will also be able to access an organization's full directory (Active Directory or Azure Active Directory) when searching within Fuze Desktop.

Connecting to an External Calendar

Connecting additional accounts in Fuze Desktop can be used to sync the user's status with an external calendar.

- Click the profile dropdown menu

- Select **SETTINGS** and then click **Connected accounts**

- Click the ⬤ toggle to sync to G Google and Office365 calendar events

fuze tip Status will be set to **Busy** when there is an event on the user's calendar.

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Automatically start Fuze and **Minimize to System Tray** (Windows only) are Fuze Desktop Only

Show mini controller for calls and meetings (Fuze Desktop Only) – opens a small floating window to control an active call or meeting when using other applications

Enable Do Not Disturb when I'm sharing my screen in a meeting (Fuze Desktop Only) – turns off notifications for messages and sends calls to voicemail when user is sharing screen in a meeting

Disable post call and meeting quality surveys – turns off the quality surveys that appear when a call or meeting completes

Disable help banners and notifications for issues that may affect quality of your calls and meetings – turns off any help banners or troubleshooting notifications that may appear during a call or meeting

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- **Utilizing Queues**

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Viewing Information in the Queue as an Agent

The **Your Queues** view will display available information about queue calls, including:

- The number of **Your calls today**
- The **Longest idle time** since the last connected call
- The number of **Calls waiting** to be answered
- The number of **Active agents** signed into the queue
- The **Average wait** time for a call in the queue
- Service Level (**SLA**) percentage

fuze tip — Agents have the ability to search for queues from within their queue views.
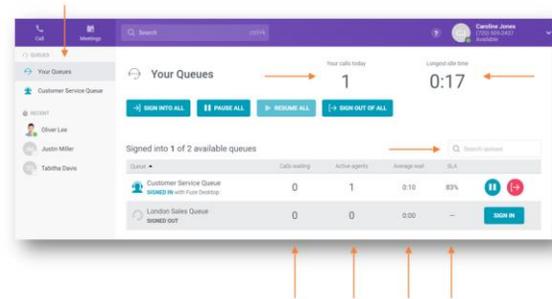
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Average wait – the average time taken for agents to answer a call or the time a customer waits in the queue before being answered

SLA – the threshold set by an organization that specifies the target time (in seconds) that an agent has to answer a queue call

Agents can hover over the **SLA** percentage to view the target time.

Signing into Queues as an Agent

From the Fuze Desktop home page:

- Click the **Your Queues** ⊕ icon
  - The queues window will open

- Click the →] SIGN INTO ALL button or click the SIGN IN button for the individual queue to join

- Select the preferred device from the dropdown menu

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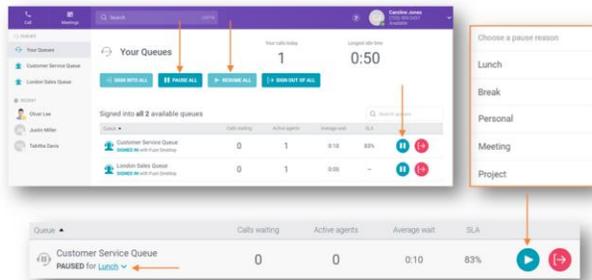
When using the **PAUSE ALL** button, the pause reasons pop-up box will appear. An agent can pause while on an active queue call, the call will be uninterrupted, and the agent will be paused after that current queue call.
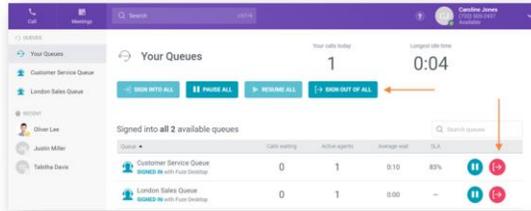
When signing out of a queue from the left-side panel, only the selected queue will be signed out. When an agent logs out of a queue, the agent's calls are no longer shown in Queue reports within Fuze Data. When an agent is paused in a queue, this information will display in Queue reports within Fuze Data.

Answering a Queue Call as an Agent

Queue calls will be presented with caller ID and name of queue.

The floating comms control window can be moved to a preferred location on the screen.
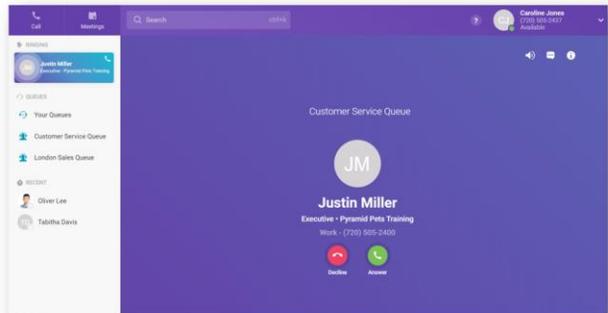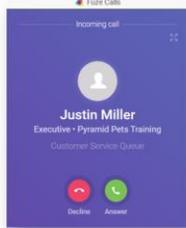
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After attending this training, users should have a basic understanding of:

- Application overview, signing in, and desktop layout

- Setting presence status, signing out, and accessing help

- Softphone functions including call management and voicemail list

- Configuring settings

- Utilizing Queues

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Softphone Knowledge Check

1. Call history will not be updated when placing or receiving a call. True or False? **False**

2. When receiving a call while Fuze Desktop is inactive, a call comms window will appear. True or False? **True**

3. Signing out will set the user's status to "Out of office". True or False? **False**

4. Which icon is used to transfer an active call? **→ Transfer**

5. To add a contact, a user can click the ellipsis in the People list and select the **+ Add Contact** button. True or False? **True**

6. It is possible to share a desktop screen while on a call with a colleague. True or False? **True**

7. Notification sounds for incoming calls cannot be muted. True or False? **False**

8. Performing a Transfer Now allows a user to speak with the recipient of the transfer prior to transferring the call. True or False? **False**

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Thank You!