



## INSTALLATION

Select a version to download and install:



Follow the instructions to install the app. Troubleshooting instructions are available on the download page for each version.

## Login

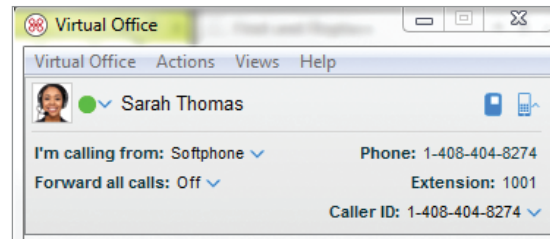
1. Launch the Virtual Office desktop app from your computer.
2. Enter the username from the welcome email.
3. Use the password which you set with the link from the welcome email.
4. Click **Login**.

## To reset password:

1. Go to the **Virtual Office desktop** application or app login screen.
2. Click **Help** in the login screen.
3. Follow the instructions to access your username or reset the password.

## NAVIGATION

- The icon in the upper-right corner drops down to display your user information in the header.



- Below the header you will see the main navigation menu:




- Click the navigation tabs to access **Contacts**, **Meetings**, **Phone**, **Fax**, and **History**.

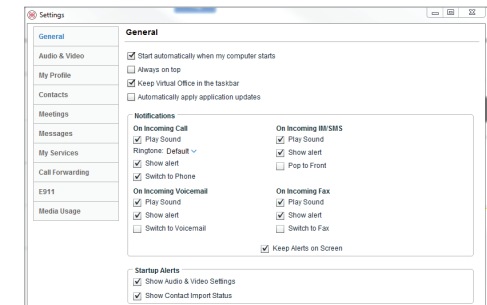
- At the bottom of the window you will find the following options:



## SETTINGS

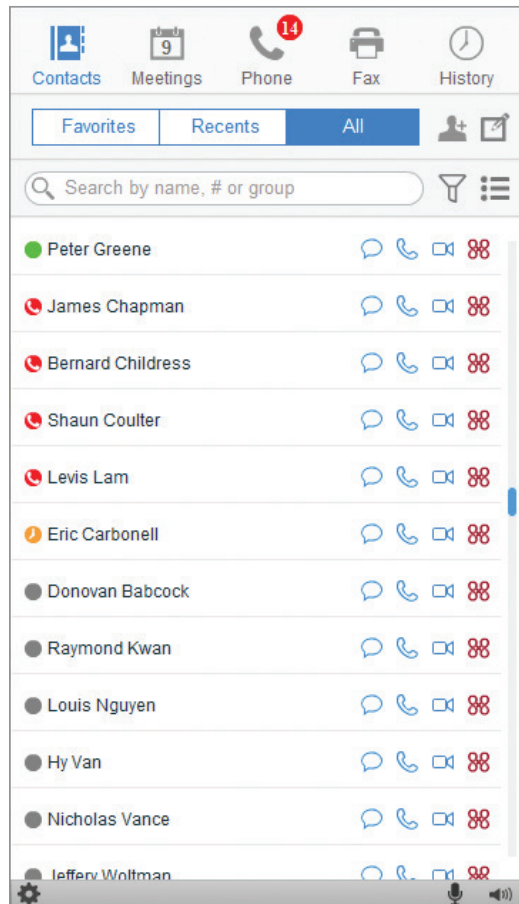


1. To access **Settings**, click  or from the file menu, go to **Virtual Office > Settings**.
2. Use settings to personalize your app and set your overall preferences.



- **General:** Manage startup and notification settings.
- **Audio & Video:** Change microphone, speaker, and camera settings.
- **My Profile:** Manage phone numbers and password.
- **Contacts:** Import and sort your contacts.
- **Meetings:** Select meeting notifications.
- **Messages:** Customize chat settings.
- **My Services:** Manage caller ID, voicemail, call recording, and fax, and see services included in your Virtual Office plan.
- **Call Forwarding:** Set call forwarding rules.
- **E911:** Set emergency call address.
- **Media Usage:** View your used and remaining free Virtual Office data storage.

## ACCESS CONTACTS

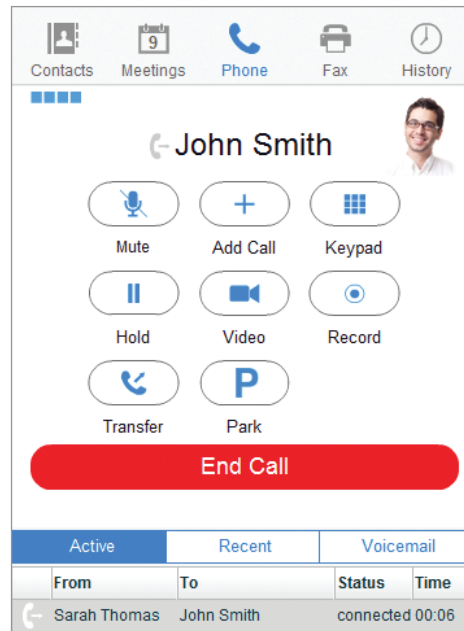


- Search or filter by **Favorites, Recents, or All**.
- Click to **Sort, Filter, or Group** contacts.
- Click to customize and select **Compact View** and **Detailed View** of contacts.
- View contact presence: **Available, Away, Do Not Disturb, Busy, or Invisible**.
- Next to a contact, click to chat, to call, or to make a video call.

## MAKE CALLS

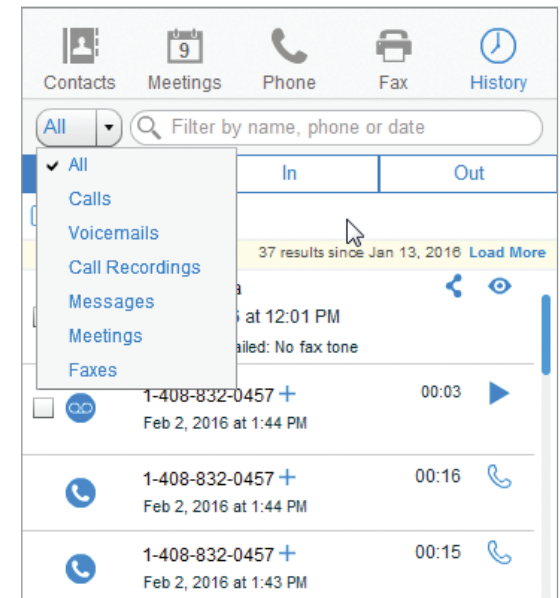


To initiate a call, select a contact and click or dial a number using the keypad (click ) under **Phone**, or select from recent calls under **History**.



- During a call the contact name or number will be displayed above call management options.
- Call management options include **Mute, Add Call, Keypad, Hold, Video, Record, Transfer, and Park**.
- Video calls will only connect if the minimum connection quality is available.
- Transfer options include transferring to a contact or dialing in a number. You can also transfer the call between your devices, e.g., to your desk phone.

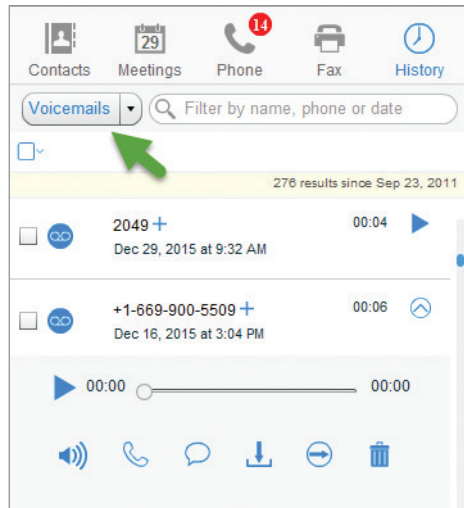
## CHECK HISTORY



- Search for calls, faxes, voicemails, etc.
- View **All, Calls, Voicemails, Call Recordings, Messages, Meetings, or Faxes**.
- Filter by **All, Inbound, or Outbound**.
- Select a message to delete it, or mark as read or unread.
- Click on a message to view details or play back recordings and voicemails.

## ACCESS VOICEMAILS

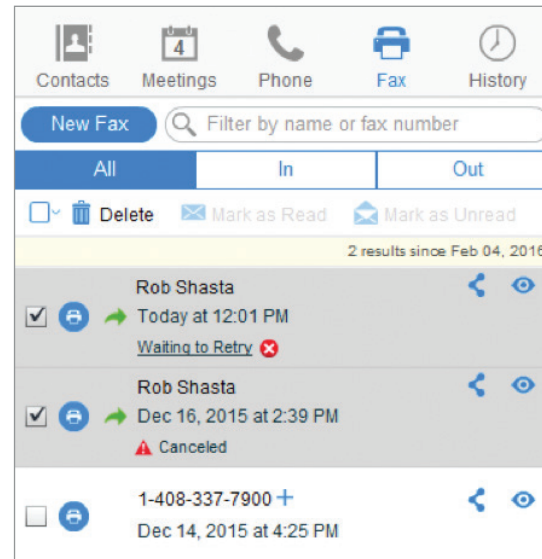
1. In the **History** tab, click the drop down menu and select **Voicemails**.



2. Select a voicemail and tap to play the message, to control the volume, to call the sender, to chat with the sender, to download the message, to share the message by email, and to delete the message.

**Note:** You can also access voicemails by clicking the **Phone** tab from the navigation menu and selecting the **Voicemail** tab.

## ACCESS FAX



- Click the **Fax** navigation tab to view existing and create new faxes.
- Select a check box next to a fax to **Delete**, **Mark as Read**, or **Mark as Unread**.
- Click next to a phone number to add it as a contact.
- Click to share the fax with another party, or click to view it.
- indicates faxes that you have sent.
- Click to cancel a fax.
- indicates faxes that have failed.

## View or Save Fax

Click to display the fax in a pop-up window. You can save it as a PDF.

## Send a Fax

1. Click **New Fax** to create a fax. The New Fax window opens.
2. Enter the fax number or contact name.
3. To include a cover sheet, check the **Include Cover Sheet** check box, and click **Edit** or **Preview**.
4. Fill out the **Name** and **Subject** fields.
5. Add supported attachments.

**Note:** Total combined file size must not exceed 19MB.

**Note:** Meetings, fax and call recording features are available with Virtual Office Pro extension plans.