

# SIP Softphone Quick Reference Guide



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## Starting the Agent Module and Softphone

1. Turn on the PC and log into Windows.
2. Click **Start / All Programs / T-Metrics Applications**.
3. Click on the **ACD Agent Module** icon to start the Agent Module and the SIP Softphone.

## Logging In, Changing Status, and Logging Out

1. Click either "Log In" from the Agent Module form, or "Log On" from the Softphone form.
2. You can change your status from either form window.
  - a. Click on your current status to view a drop-down list of other available status options.
3. Select "Logged Off" from either form window to log out.

## Softphone Main Form

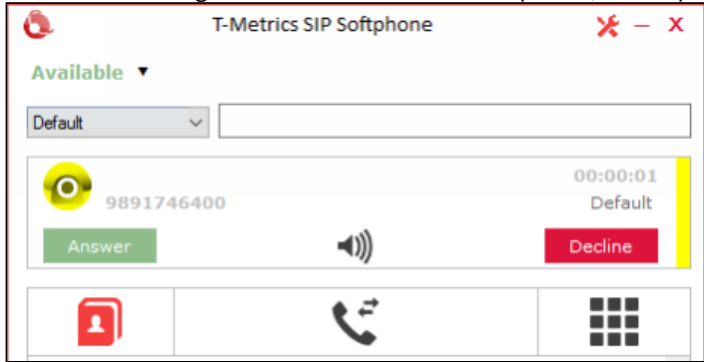
The screenshot displays the T-Metrics SIP Softphone interface. The main window is titled "T-Metrics SIP Softphone" and shows a status of "Available". Below the status is a "Default" dropdown menu and a search bar. The main area contains a navigation bar with icons for a user profile, a call, and a dial pad. Below the navigation bar is a large dial pad with buttons for digits 1-9, \*, 0, and #, each with corresponding letters (e.g., 2 ABC, 3 DEF). At the bottom of the window, there are three status indicators: "DND Off", a voicemail indicator "3", and "CONNECTED".

**Icon Key**

- Brings up the settings and help options.
- Available** Current status. Click to select a different status.
- The Softphone Dial Pad.
- Call History.
- Your Favorites list.
- DND Off** Do Not Disturb. This will prevent you from receiving calls.
- 3** Voicemail indicator. You can click this icon to listen to your voicemails.
- CONNECTED** Connection status of line to phone switch.

# Processing Calls


When an incoming call is routed to the SIP Softphone, the display will appear just below the outbound dial field.



When a call is active, select the **Hold** button to place a call on hold. To take a call off hold select the **Resume** button.

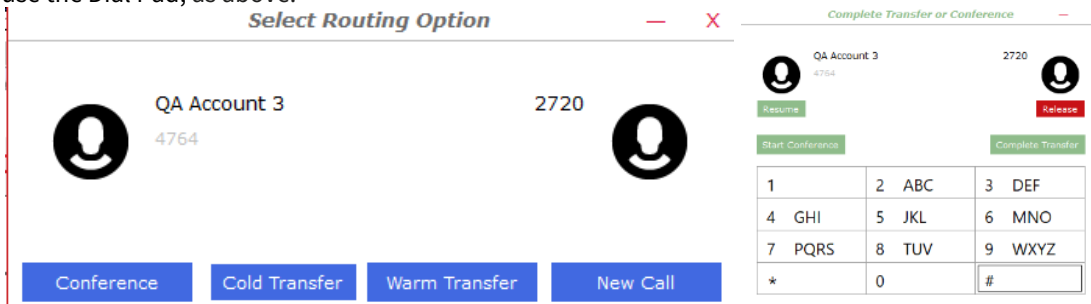
# Placing Calls

To place an outbound call, enter a phone number into the call field found toward the top of your Softphone form and press enter on your keyboard. You can also use the Dial Pad to enter the number.

The Dial Pad  also allows you to send DTMF signals through your softphone, as you would from a touch-tone phone. For example, if you have called into an Interactive Voice Response system, the Dial Pad will allow you to navigate the automated options.

# Transferring Calls

You can transfer a call by placing an outbound call, while you are already on an active call. Enter a phone number into the call field or use the Dial Pad, as above.



Select **Cold Transfer** to transfer the active call directly to the newly placed outbound call line. Or, select **Warm Transfer** to stay on the line while the call is transferred. You will remain on the line with the ability to listen in until you select **Complete Transfer**. Alternatively, selecting **Release** will release that party, returning you to the original active call.

# Voice Mail

When there is a voicemail available for your account, the indicator at the bottom of your Softphone will appear. Double clicking this icon will dial your voicemail system.

