# officeXtend Desktop User Guide

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*Welcome to **officeXtend**. Everything you need to set up and use your officeXtend desktop phone client is found here. This guide is for users that have subscribed to a business service that includes the officeXtend client.*

# Features of the Client

The desktop phone client offers a number of features to compliment your business phone service or to use in place of your desk phone. This includes:

• Placing calls that appear to come from your business line.

• Transferring calls from your business line.

• Answering calls that arrive at your business line.

• Configuring your business line features including Call Forwarding options, Call Waiting and Do Not Disturb.

• Support for chatting internally with other people in your organization. **Note**: Sending and receiving SMS/MMS messages requires additional setup. Please contact your salesperson for assistance.

# Installation

Installation is quick and easy. Download the client from ncommandapp.com. Choose either the Windows or MAC download.

## Windows Installation

- *As a note for system administrators, this app is packaged as a winx app and does not install in Program Files.*
- Save the downloaded app in a temporary folder like Downloads.
- Locate the downloaded file and double-click to start the installation and follow the instructions.
- Once the application is installed, you can pin this to your Start menu or taskbar for easy access.
- Click the application icon to start officeXtend.
- A Welcome Wizard will walk you through setting the application as your default calling application.
    - Clicking Settings will load the Windows Settings section where you set Default apps.
    - Scroll to the bottom of this settings page and click "Choose default apps by file protocol".
    - Scroll until you find TEL on the left-hand side. Click "Choose a default", or click the existing app name.
    - From the list, choose "officeXtend".
    - Do the same for the SIP protocol.
    - Close Windows Settings and click Next in the Welcome Wizard.
- Next is an option to enable your video camera if you would like to use it with officeXtend. Clicking Settings will launch your Windows Settings for configuring how your camera is used by applications and allowing you to selectively choose which applications have permissions to use your camera.
- Update your camera permissions and close Windows Settings, then click Next in the Welcome Wizard.
- Click Finish in the Welcome Wizard to complete the setup of officeXtend.
- At the login prompt, enter your username and password.
- Your username will be your phone number (DID) followed by one of the following. You will be instructed on which format to use:
    - [phonenumber@corpglobal.net](mailto:phonenumber@corpglobal.net) - EX: [5551112222@corpglobal.net](mailto:5551112222@corpglobal.net)
    - [phonenumber@bwas.voice.onvoy.net](mailto:phonenumber@bwas.voice.onvoy.net) – EX: 5551112222@bwas.voice.onvoy.net
- Your password is set up by you when you received an email to setup your account.
- Note that the first time you run officeXtend, you may receive a popup to allow firewall access. You should always set this for private networks unless instructed otherwise by your IT staff.

## macOS Installation

- Save the downloaded app in a temporary folder like Downloads.
- Locate the downloaded file and double-click to start the installation and follow the instructions.
- Drag the officeXtend icon onto your Applications folder to install the application.

- Start finder and eject the installation file as that will no longer be needed. This will typically show in Locations.
- Locate officeXtend in your Launchpad or Applications folder and click to start.
- macOS will pop up a warning about the application being downloaded from the internet. Click "Open" to continue. You only need to do this each time you install or update the application, not on each launch.
- A Welcome Wizard will walk you through setting the application as your default calling application.
- Click Configure to set officeXtend as your default calling application, then click Yes in the next prompt.
- Click Next, then Finish in the Welcome Wizard.
- At the login prompt, enter your username and password.
- Your username will be your phone number (DID) followed by one of the following. You will be instructed on which format to use:
  - phonenumber@corpglobal.net - EX: 5551112222@corpglobal.net
  - phonenumber@bwas.voice.onvoy.net – EX: 5551112222@bwas.voice.onvoy.net
- Your password is set up by you when you received an email to setup your account.

# Using officeXtend

This section will walk you through the initial configuration of the application, use of the features and exploring the configuration options.

## Logging In

When you first start the client, enter your username and password in the appropriate fields and press the Sign In button. If you don't know your username and password, please contact your Administrator for assistance.

On the first login, you will be presented with a Licensing Agreement where you can accept the terms.

## Sidebar Menu

Once you click AGREE, the main phone dialpad screen will be shown. The side bar menu provides access to the main features of the application.

- The Dialpad screen shows the main phone dialing screen.
- The Contacts tab contains two lists of contacts:
  - Address Book (macOS only): this will show the contacts from your macOS Contacts application.
  - Enterprise: this will show a list of all users and services in your company.
- The Recents screen shows the history of calls made on your desktop soft phone client. This includes all incoming, outgoing and missed calls. *Missed calls are notated by the number in the circle.*
- The Messages screen shows the history of your message threads.
- The Call Control screen is where you set all the configuration options on your service such as a Call Forwarding number, Call Waiting, Call Center login/out, extended directory listings and many other feature settings.
- The partial-moon shaped icon is for setting local Do-not-disturb.
- The gear icon will bring up application settings.
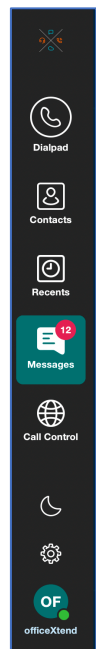
## Application Sections

The application area is broken up into sections. The Sidebar contains the menu items. The primary screen area shows the content for the selected sidebar menu. The secondary screen area depends on the action taken in the primary screen area. The secondary screen only shows if you expand the width of the client to show both the primary and secondary screens. Otherwise, the secondary screen content takes over the primary screen while viewing it. Clicking Back will return to the primary screen.
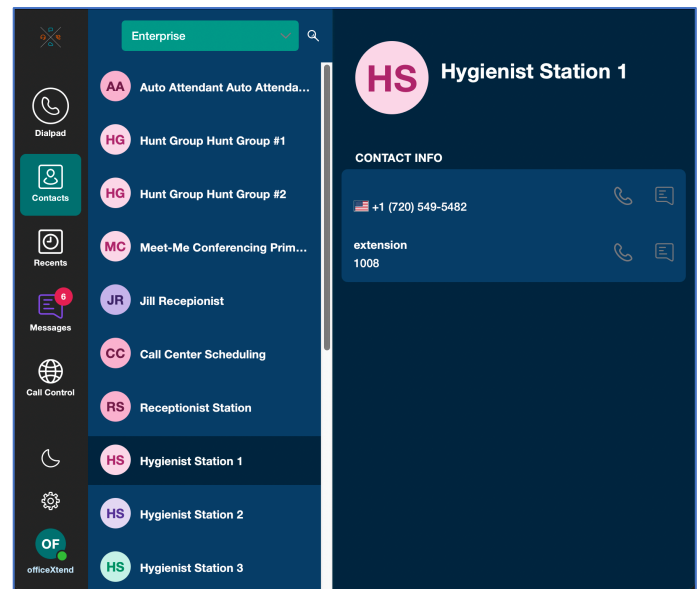
## Dialpad Screen

The dialpad screen is your main dialing screen. From here you will place calls and interact with any in-call menus via touch-tones.

### Placing a Call

To place a call from the call screen, enter the ten-digit number or extension of the person you wish to dial and click the call key at the bottom right. To redial the last number called, click-and-hold the call key for a few seconds to pull back the last number you called, then click the call key again to call that number.

### Dialing from Contacts

Click the Contacts button, then choose a contact from a directory. Entries with a phone number will have a phone icon on those. Click the icon to dial that number.

### Dialing From Recents

Click any single-number entry in your Recents list to open that entry. Click the phone icon in the upper right to call that number.

### Dialing From Messages

If you've only ever chatted with someone before, click any single-number entry in your Messages list to open that entry. Click the phone icon in the upper right to call that number instead of messaging them. This does not work for chat sessions containing multiple users.

### Dialing from Call Control/Directories

Click the Call Control tab, then click the Directories tab (folder icon). Click the highlighted phone number to call that number. Note: officeXtend must be set as the default calling application.

### Voicemail

You can access your voicemail from the voicemail button in the middle of your call screen. Alternatively, you can place a call to *62. The first time you access your voicemail, you will need to set it up. The verbal prompts will guide you through creating a security passcode, recording your name, and completing set-up.
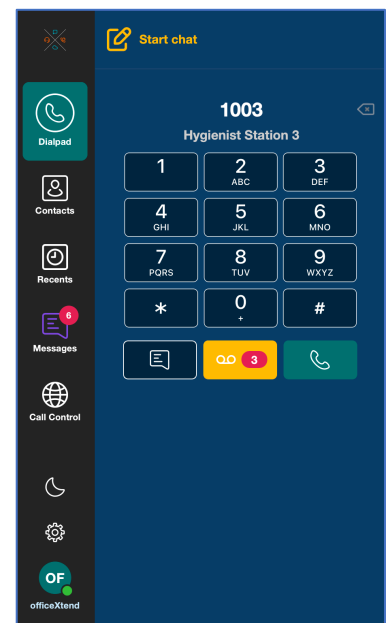
The Voice Mail button on the Call Screen will only appear when you have messages. You will receive a message waiting indicator on the Call Screen over the voicemail button that will tell you how many messages you have in your voicemail box along with an audio notification. Verbal instructions within the voicemail service itself will allow you to delete, save, and replay messages.

## Mid-Call Actions

During the call, your screen will show information about the call. You can see an example of this in the image to the right. In the middle, you will see contact information, including the telephone number and name if this matches a contact or is supplied by the phone network. The bottom left and right side of the contact has indicators that show how loud each side of the conversation is. In the upper right corner is an information button to see more details about the call like Wi-Fi strength and data statistics. This helps determine if the data network might be impacting your current call. Ongoing call duration is shown below the contact/number information. Below this is a series of buttons. From left-to-right:

- **Speaker:** The button lets you change which audio device you are using during an active call.
- **Pause:** This button will place your call on hold. Pressing it again will take the call off hold.
- **End Call:** this button, at the bottom, will terminate the call.
- **Mute:** You can toggle the mute of your microphone with this key.

Along the bottom of the mid-call screen there are five additional buttons:

- **Add Call:** this button will allow you to place the current caller on hold while you call another person. Once you have added another user, you have the option to **Transfer** or **Join** the users in this call in a 3-way conference. You also have an option to **Switch** between the two users alternatively placing one on hold while you speak to the other. You can also hangup with whoever is the active caller, then take the other caller off hold and continue speaking with them.
- **Att. Transfer**: this button allows you to do an Attended Transfer. The original caller is placed on hold while you call a second user. Once you finish speaking to the other user, press the **Transfer** button to complete the Transfer, or the **Cancel** button to return back to the original caller. You can also choose to **Join** everyone in a 3-way conference.
- **Keypad:** this opens the keypad so you can interact with any touch-tone menus. Note: clicking **Keypad** at the top takes you back to the primary screen and shows the dialer screen again, but you can return back to this screen.
- **Blind Transfer:** use this button to place a blind transfer.
- **Switch to Dialog:** use the button to pop out the current call into a separate window.

## Contacts Screen

Contacts accessible from officeXtend are visible here. On macOS, contacts from the Contacts application are available under **Address Book**. Your **Enterprise** directory is available as well that will show all users and services in your company. To the right of the address book selection is a search option. Just begin typing to narrow down your search. There is a more extensive directory available in the Call Control tab in the directory section that includes your list of imported contacts and personal contacts.

## Recents Screen

The recents screen will show all calls to and from your business line as well as any missed calls. The information about the calls appears on each line, including direction (inbound or outbound), Contact Name or number. Click the entry to see the history of calls on that specific number.

Clicking the phone icon will call that number. Click the clock icon for sort options.

### Clear Calls from History

While viewing history for a specific call, you can click the delete icon on each call entry or click the delete icon in the upper right for other options.
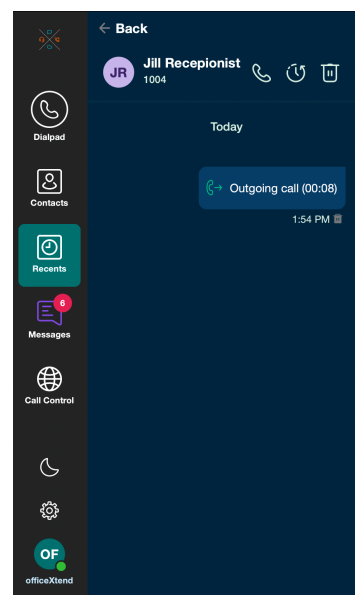
## Messages Screen

The messages screen contains your list of existing message threads. These could be single or group chats. Clicking on a thread will open it and you can continue any previous session you had.
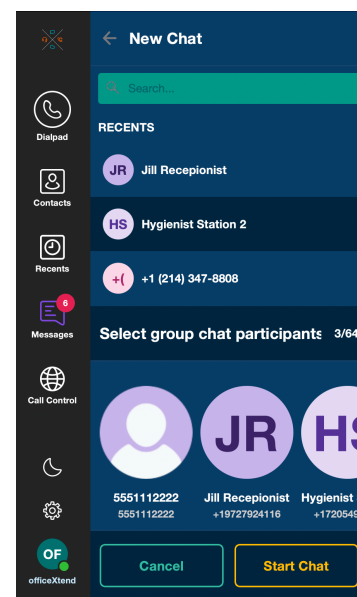
### Sending Messages

To send a message to one or more people, click **Start chat** at the top. Users can be added to the chat in the following ways:

- Add anyone from the Recents section by clicking that entry
- Begin entering part of a name or part of a number in the Search field to find users in your directory
- Enter a phone number, then select that entry if there are no matches
- When you have added everyone to the chat, click Start Chat

To create the message content:

- Type in the message you want to send in the bottom entry field.
- Emojis can also be included in your message.
- Additionally, you can attach an image or video from your computer. You may have to allow additional permissions to access the file system.
- To send your message, click the send icon.

### Receiving Messages

Messages that are received will create a notification with your default text message tone. The sidebar Messages icon will also include an indicator that you have unread messages. When you receive a message, click the Sidebar to view your list of messages and which one(s) have unread messages. Click the thread to open the message.

# Call Control

This grants you access to a menu of various call settings you can use to change features on your business service. These settings affect calls to your desk phone, desktop softphone client and the officeXtend mobile client. Settings are segmented into **Call Settings**, **Voice Mail Settings**, **Call Center** (only shows if you are assigned to at least one Queue) and **Directories**.

## Call Settings

These settings will affect various call handling options.

### Do not disturb

The single slide button here will enable and disable do not disturb mode, handling all incoming calls as if you were busy. All calls to your business service will be sent directly to voicemail.

### Anonymous Call Rejection

When this is activated, your residential service will automatically reject unknown and anonymous numbers.

### Calling Waiting

Your business service includes the Call Waiting feature. This allows you to receive a notification when someone is calling you while you are already on a call. officeXtend will show the calling information about the second call to help you decide if you want to answer that call. If your business phone has a Caller ID display, you can see information about the second caller as well. You can then either ignore the call or you can answer the second call which places the first call on hold.

### Automatic Callback

When this is activated, any calls you place to a busy user will play a prompt asking if you'd like a callback when they become available.

### Block My Caller ID

This setting can be used to conceal your outbound Caller-ID. When enabled, all your calls from your service will appear as an anonymous caller to those you dial.

### Call forwarding

There are a handful of call forwarding options available. Click the Call Forwarding section to expand the options. Click **Save** at the bottom of the section to save any setting changes.
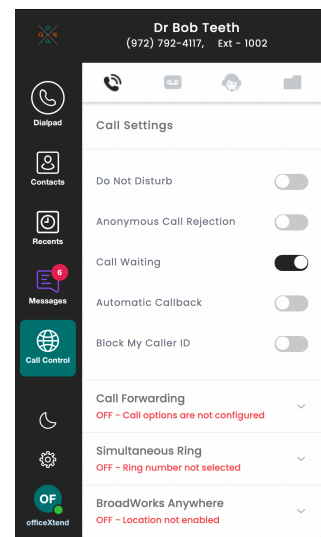
**Always**

Click the checkbox to enable or disable this feature. The last number entered here as a forwarding number will be remembered, or a new number can be entered.

**Busy**

Click the checkbox to enable or disable this feature. The last number entered here as a forwarding number will be remembered, or a new number can be entered. If Call Waiting is enabled, Call Forwarding When Busy will not take effect until you have two calls established – one active and one on hold. If Call Waiting is disabled, this forwarding option will take effect as soon as you have one active call and any subsequent calls will be forwarded.

**No answer**

Click the checkbox to enable or disable this feature. The last number entered here as a forwarding number will be remembered, or a new number can be entered. Choose the number of rings to allow before calls are forwarded to the destination number. If this feature is off, unanswered calls will forward to voicemail by default.

**Not Reachable**

Click the checkbox to enable or disable this feature. The last number entered here as a forwarding number will be remembered, or a new number can be entered. This feature is ideal to use in case your business service becomes unavailable and you want those calls routed to another number. If this feature is off, calls will be sent to voicemail if your business service becomes unavailable and you have the officeXtend client set for local Do Not Disturb.

*Simultaneous Ring*

The simultaneous ring feature can be used to ring multiple phone numbers on incoming calls to your business number. Slide the **Ring Numbers** slider to the on position, then enter a phone number, such as your mobile number and click **Save**. The **Answer confirmation required** option can be used to play a prompt to the caller to accept the call. This is useful to prevent a voicemail service on your mobile number from automatically answering the call. Additional numbers can be added by clicking +, then entering and saving a new number. The **Do not ring when on a call** option can be used to prevent sim ringing your devices if you are already on a call.

*Anywhere*

NOTE: If you are using the Call-Through feature with the mobile officeXtend client, the Anywhere service must have the first Location section configured with your mobile phone number entered as the Phone Number in order for the Call-Through feature to work. This is required to help matchup the call from your mobile phone to the special service number(s). This Location should **NOT** be set as Active or you will receive both a call to the client and a cellular call to your mobile number at the same time. If you are not using the Call-Through feature, you may use the first location for other numbers.

This section allows you to create up to three locations that are useful for utilizing the Anywhere functions:

- **Add Number:** NOTE: First location must be your mobile number.
- **Check box:** If the Location is checked (active), calls will also be routed to the **Phone Number**.
- **Eye icon:** click this icon to expand the list of options.
- **Description:** This field is a name you want to give this Location and will help identify locations.
- **Do not divert calls:** When enabled, this option will prevent calls that the business service sends to your mobile phone from being diverted to your mobile phone company's voicemail when the first Location is Active. However, most phone companies do not support this option. Answer confirmation is normally preferred.
- **Answer Confirmation:** When enabled, this option prevents your mobile phone company's voicemail system from answering and accepting the call so that voicemails are left on your business service if you have this Location set as Active. When your mobile phone company's voicemail system answers the call, the system prompts the voicemail platform (or any caller) to enter a touch tone to accept the call, which the voicemail system won't do. This allows sufficient time for your business service's voicemail system to pick up the call instead if the call goes unanswered.
- **Call Control:** For future use.
- **Outbound Alt. #:** Enter a secondary phone number where you want calls to ring to instead of the main location number if you have this Location enabled. The main **Phone Number** will not ring in this case.
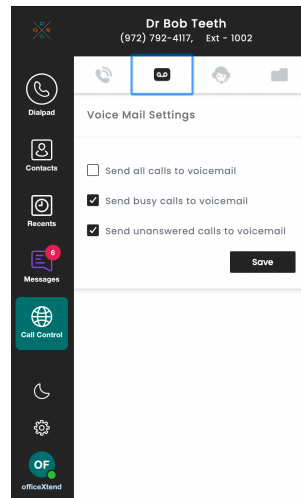
## Voice Mail Settings

These settings will affect what calls are routed to voice mail. Click **Save** to save your changes.

*Send all calls to voicemail*

Check the box to send all calls to your business service directly to voicemail.

*Send busy calls to voicemail*

Check this box to send all calls to voicemail if your line is busy. Enabled is the default.

*Send unanswered calls to voicemail*
Check this box to send all calls to voicemail when you don't answer the call. Enabled is the default.

## Call Center Settings
This section will only show if you are a member of a call center queue. These settings can be used by Call Center users to change your status and log in/out of queues if permitted by your Call Center Supervisor.

### Queues
Click the drop-down list to see the list of availability statuses you can use in your call center queues such as Unavailable, Wrap-Up, etc. Your call center supervisor may have added additional unavailability options.

Your list of Queues you are a member of will be shown. The In/Out status can only be changed if your call center supervisor has permitted you to control joining queues.
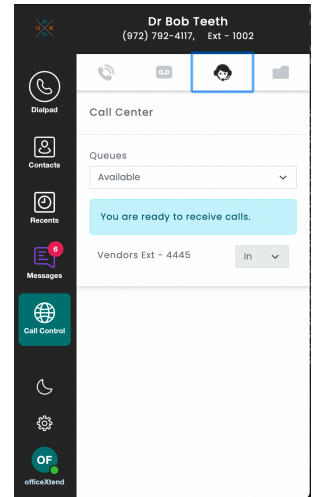
## Directories
The Directories section shows a more complete list of contacts for your Enterprise than what's in the Contacts sidebar section. This list includes all users and services in your Enterprise, along with any custom lists that have been imported and any Personal List entries you may have added. Contact your system administrator if you are unsure how to add contacts to your Personal List.

# Do Not Disturb – Local Only
The partial moon-shaped button provides an option to place your client in Do Not Disturb mode. Whenever you don't want to receive business calls to your desktop device, use this option as a way to silence the calls. Calls will still ring to your business service such as your desktop phone. See the **Call Control** section if you want to send all calls to your business service to voicemail.

# Settings
The Settings section pops up a list of settings that you can use to change tones, adjust sound settings and other options.

## About
This will display version information about the particular build of the software you are running.

## Account setup
This screen displays your username and a support link.

## Notifications

This section lets you choose available ring and text notification tones.

## Sound

This section lets you make a number of changes to your Sound settings. This includes choosing you Microphone and Speaker devices, adjusting the mic and speaker volumes, as well as access to noise suppression and echo cancellation features.
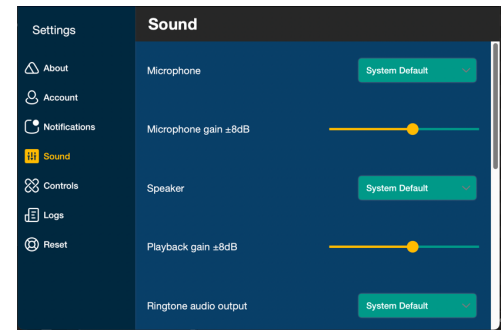
## Controls

This section provides various application options like Launch at login, language and other options. The initial setup wizard can also be relaunched from this section.

## Logs

This section provides access to troubleshooting logs. The logs can be cleared at any time. If requested by support, the log can be saved to a local file and sent to support teams. The logs are not transmitted anywhere.

## Reset

If you need to do a complete refresh of settings and data and exit the app, this option will reset everything and log you out. Defaults will be applied when you log back in. This does not affect macOS Contacts as those are stored in the Contacts application and Messages as those will be retrieved again from the server.

# Logging Out

Closing out the application window will leave the phone client running in the background. To logout, simply right-click the application from the dock or system tray and choose Quit.