firstcom e**U**rope

Universe Softphone for
Windows and Mac

User Guide

# firstcom europe
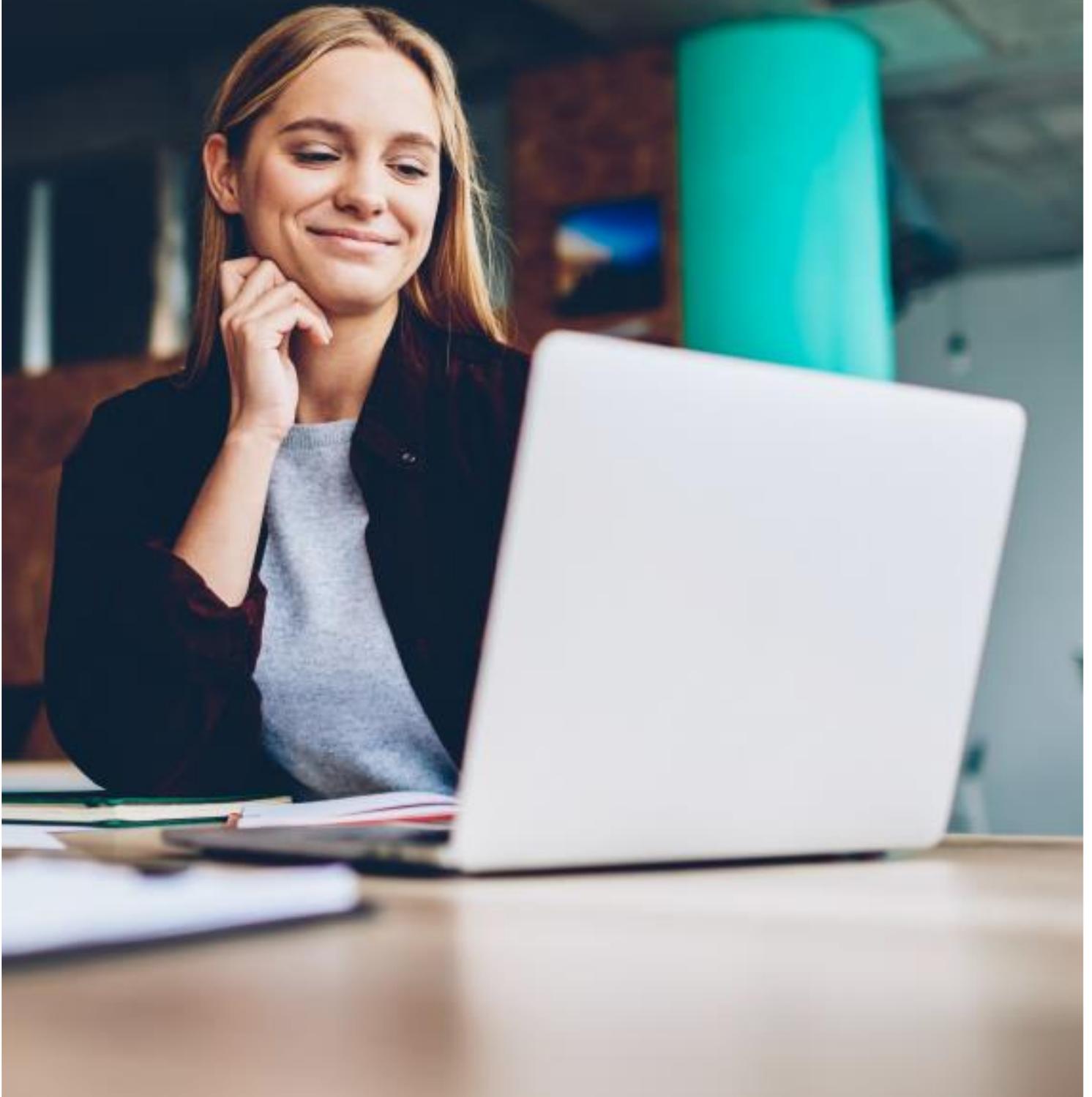
1. Universe for Windows and Mac

i. Before you get started

    a. Make sure you have a Universe account and that you know your Firstcom Universe Email and Password

    b. Make sure you are connected to Wi-Fi

    c. You will need to make sure your computer has a microphone that is active and has speakers, or you are using a headset

    d. Delete any old versions of the Universe for Windows and Mac App

    e. Make sure in your Selfcare Portal => Devices, you do not have more than 3 Softphone connections (including mobiles). Do not count fixed Business Phones.

    f. Log in to your Universe Self Care portal (https://selfcare.thisisuniverse.io/) and go to the Software icon.

   g. Select Universe Softphone for Apple or Universe for Windows
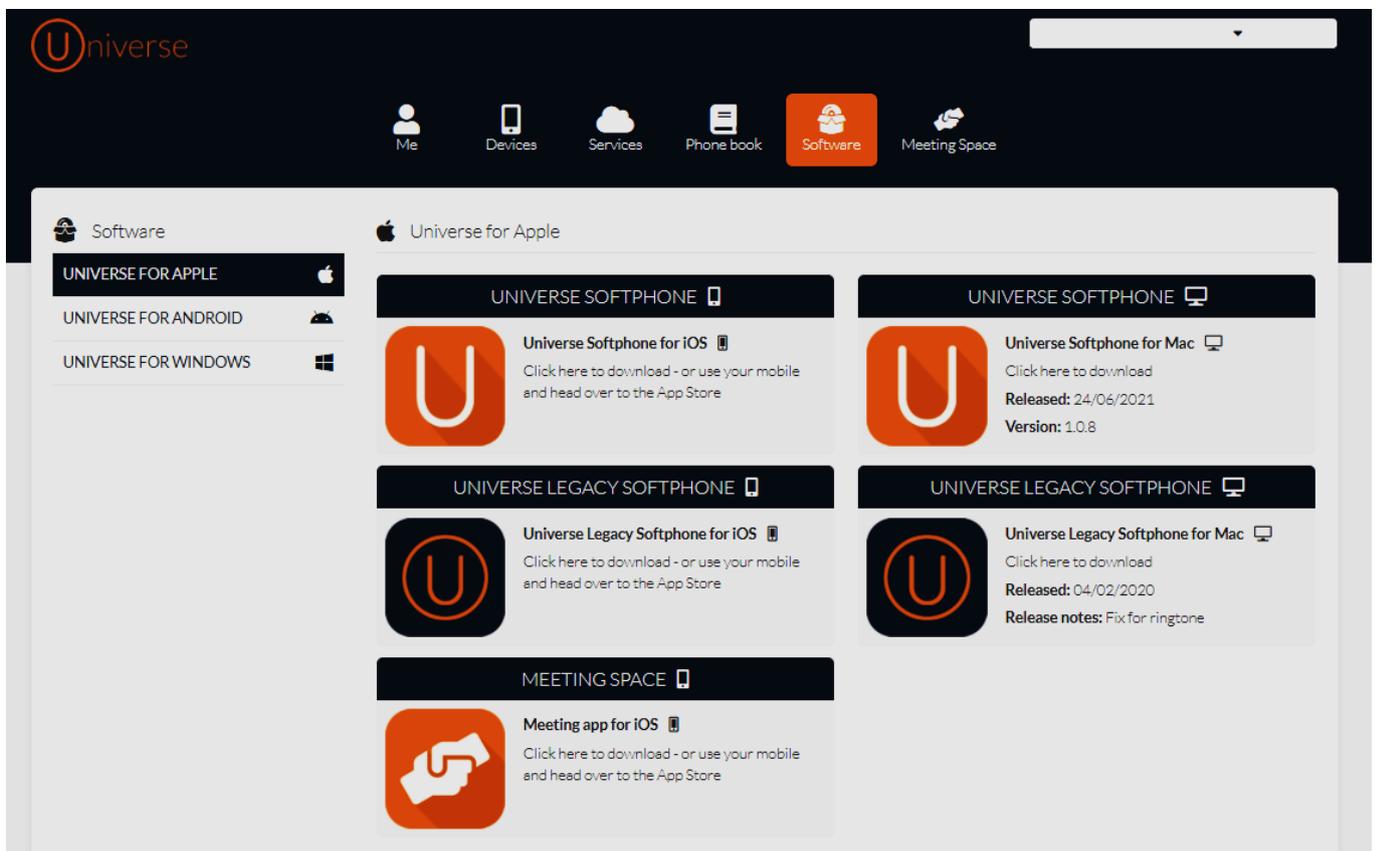
ii.   Starting the Download

    a. Select either Download for Windows or Download for macOS (Apple) depending on your computer

    b. With a Windows device the downloaded file will appear in the bottom left-hand side of your screen. Double click on the file once it has downloaded

    c. If the file does not begin to install in Windows, go to your Download folder in Windows Explorer and double click on the downloaded file.

    d. You will see "Windows protected your PC". Select "Run Anyway" "Welcome To Softphone App" => Next => Install. You may notice a new icon looking like a shield in your taskbar at the bottom of your screen. => Yes => "Do you want to allow the program to make changes to your computer". Select "Yes"

    e. "Completing Softphone Setup" => Select the two check boxes that appear: (i) Run Softphone and if you wish (ii) Select Desktop shortcut => Finish

    f. Enter your Universe email address and password => Sign In

    g. With an **Apple** device, you will get a bouncing Universe icon on your task bar. When this has downloaded a pop up will appear. Double click the softphone icon and the installation will begin. Accept that you wish to open the App when asked and sign-in. The Dial Pad should then be visible.
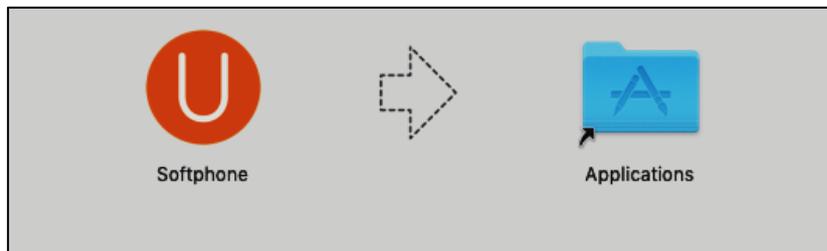
    h. The Dialpad below should automatically appear on your screen.
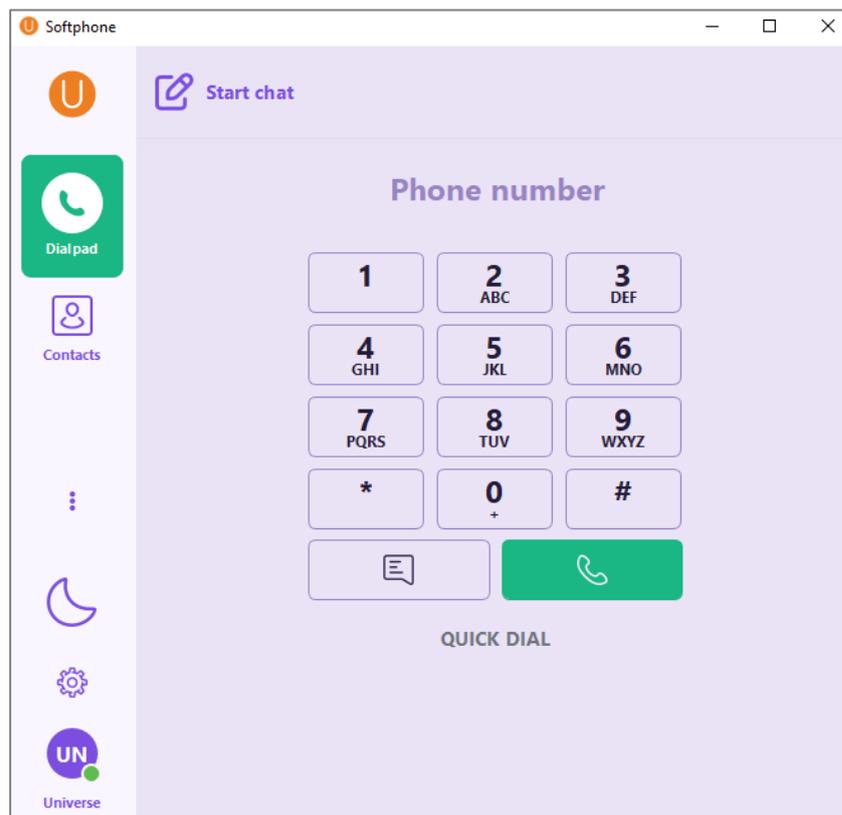
i. To see all the full menu, select the three vertical dots and you will see Recents and Selfcare. (Alternatively click on the full screen icon at the top right-hand side of your screen at the top).

j. It is a good idea to go into the "Settings Icon" (i.e. the Cog) and select Sound and then scroll to the bottom of the menu and activate Echo Cancellation

k. If you would like your Universe Softphone to start automatically when you start your computer, go to Settings (Cog) => Controls => Launch at Login

iii. Creating a Quick Dial list

a. The ability to see if a colleague is busy on their Universe phone (i.e. their "Presence") is only possible if they are in the Quick Dial list. You cannot see the Presence of non-colleagues

b. To create a Quick Dial list of numbers you call the most frequently, go to the **Universe list** and select the person you wish to put on Quick Dial, by typing in their name in the top search filed.

c. Select the icon in the top right-hand corner.

d. The following pop up will appear. Slide the "Enable BLF" (Busy Lamp Field) to the right and "Save"

e. The name now appears in the Quick Dial list

f. To delete a name, go to Quick Dial and right click the name => Delete

iv. Making Calls

There are three ways you can make a call. Keypad Dialing, Click to Dial, Internet Number Copying, Contacts Dialing or Recents

a. Keypad Dialing

- Select the green Dialpad button on the screen and select numbers either by using your mouse or your computer's keypad. To key in the numbers using your computer, first click on the blank area above the numbers on the screen keypad where it says "Phone Number" and then commence typing the numbers. (There must be no one listed in the search bar). Once the numbers have been completed press the green phone button to place the call.

b. Click to Dial

- To dial a number you see on the internet, click on it and then select Softphone in the index of choices. This will become your standard click to dial number on the softphone from now on. The number clicked will then be called. (Note that the number in the internet has to enable click to dial for this function to work)

c. Internet Number copying

- If you see a phone number online and wish to dial it, highlight the number on the internet, copy and paste it into the area above the Dialpad numbers on the screen. Then select the green phone button.

d. Contacts Dialing

- To select a number from Contacts you will note that upon pressing this key, two headings appear below the Dial Pad. These are Quick Dial and Universe, both are address books.

- If you select Contacts from the Universe option, you will see contact details stored in your Phone Book in the Selfcare Portal, including the ones that you have added here yourself, and display these in alphabetical order. Note, you cannot add extra Contacts in the Softphone, they must be added in the Selfcare portal (https://selfcare.thisisuniverse.io/)

- Next, select the relevant person and their details will appear on the right-hand side of the keypad. From here just click on the little green phone on the right-hand side of the softphone and the call will be made

e. Recents Dialing

- By selecting "Recents", and choosing a Contact, a list of numbers that you have called, or that have called you, is displayed and the time of the call. The order is from oldest to most recent as you move down the page.

- By selecting the black phone at the top of the screen alongside the person's name, a call is originated

Top Tip regarding previous calls

For more information go to your Self Care Portal and select the "Me" icon. This will also include calls from your other devices, whereas this Universe for Softphone App only includes calls from this device.

v. When you are on a call

Universe enables you to access a range of features whilst on a call.
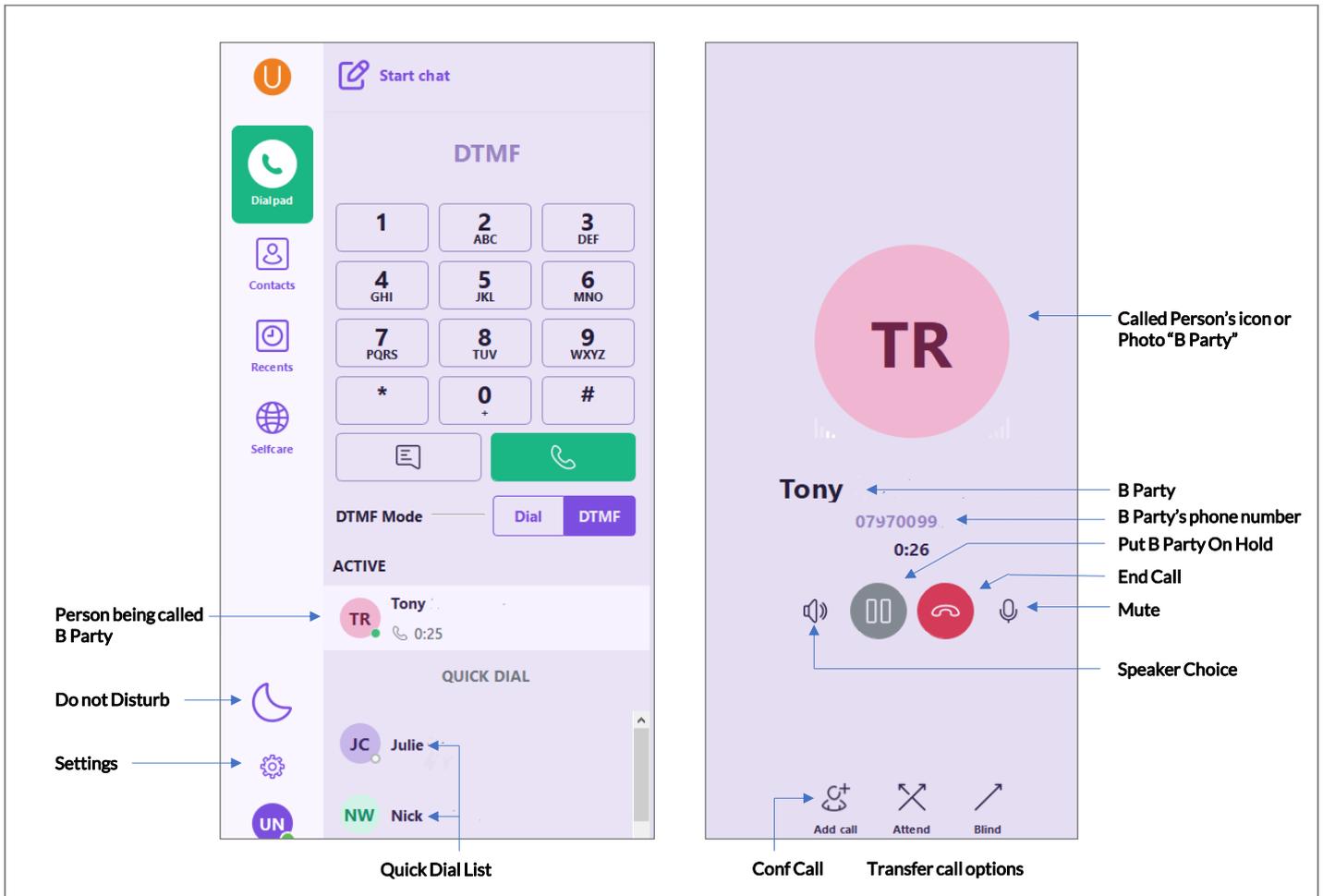
a. **B Party** is the person being called and their phone number

b. **Put on Hold** is when a caller is provided with music instead of being able to talk with the other party

c. **End Call** is to stop the call once you have finished

d. **Mute** is to silence your microphone

e. **App Size Min / Max** – adjusts the size of the app and details on the screen

f. **Attend** (transfer) is when you pass an incoming call to another person or group, and announce the call to the person receiving the call. The incoming caller will hear music on hold

g. **Blind** (transfer) is where you transfer a call without notifying the receiving party of the transfer

h. **Add Call** allow callers to be added once on the call to create a conference. You will need to add the additional phone number in the keypad or search for their name in the filed alongside the Do Not Disturb icon

i. **Do Not Disturb** means that your phone will not ring, though it does not appear in Presence

vi.   Presence

- "Presence" allows you to see which colleagues are busy or not on their Universe phones
- You will know if they are busy because you will notice that there is a green banner above their name with "On Call" written on it. In this case they are using their Universe service already. In the diagram below, Julie is on a call. To see this, the person must be in your Quick Dial list.
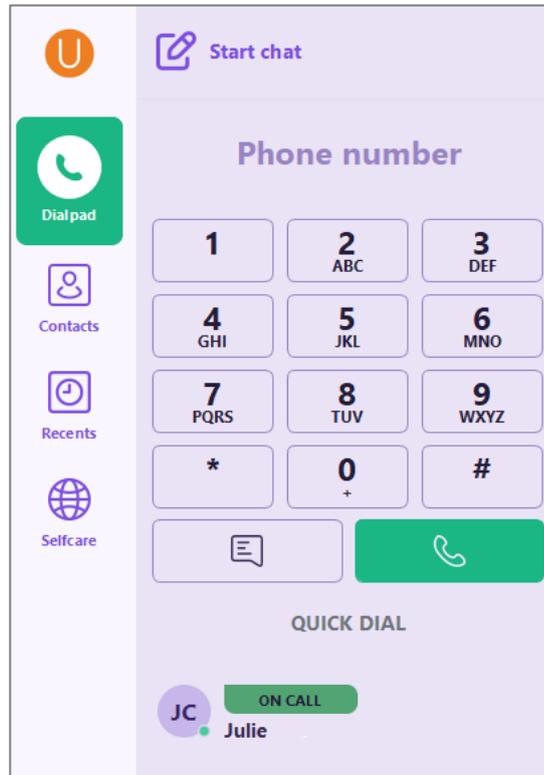
vii. Call Pick Up

- You can pick up calls that are ringing on the phones of your colleagues with Call Pick Up.

- To use this feature, make sure your colleagues are on your Quick Dial list as described above.

- Next go to Administrator view (or have your Administrator do this) and select: My Company => Call Pick Up Group => Name (select a name for your group) => Add Members => Save

- When your colleagues phone rings it will say "Ringing" as shown in the diagram below.

- Select the (green icon) green icon alongside their name or number and you will have Picked Up their call.
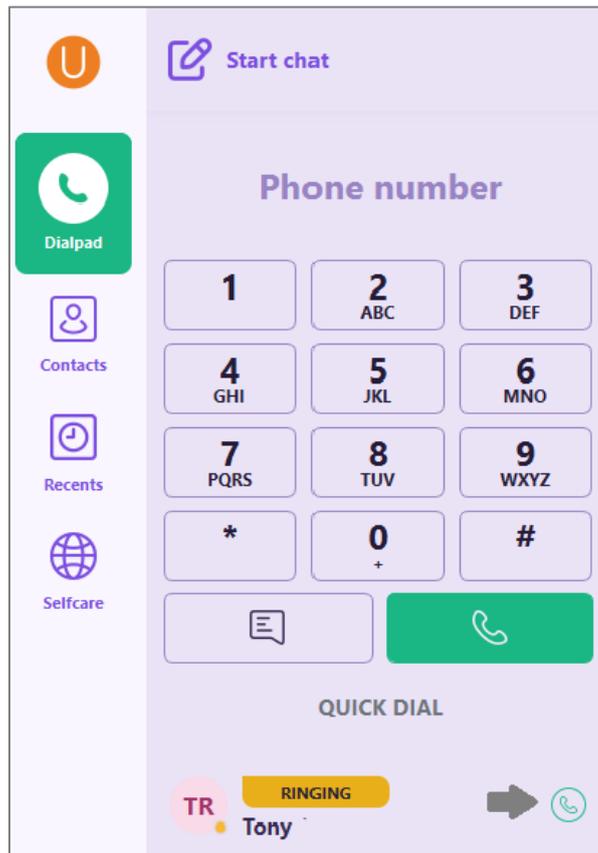
viii. Features

a. One to One Chat

- Select "Start chat" and you can choose other Universe users to chat with. However using this feature it is one colleague at a time. You can select from a range of emojis to enhance your chatting experience

- Send using the green arrow at the bottom of your screen.

- Replies can be accessed by scrolling down

b. Conference Call

- Whilst on a call, select the Add Call button => select a contact to dial a number => select Add Call again and you have added another caller. You are not restricted to Universe users

c. **Attended Transfer**

- You can receive a call (or make a call) and transfer this call to another colleague who is a Universe user. Before you join the calls, you can announce to the receiving party (your colleague), that there is a call for them and let then know who the caller is.

- Whilst on the call select Attend => choose the person to receive the call from your contacts => make an announcement to them => select Attend

d. **Blind Transfer**

- In this case you receive a call (or make a call) and transfer this call to another colleague who is a Universe User. No announcement is made before the call is transferred.

- Whilst on the call select Blind => choose the person to receive the call from your contacts => make an announcement to them => select Attend
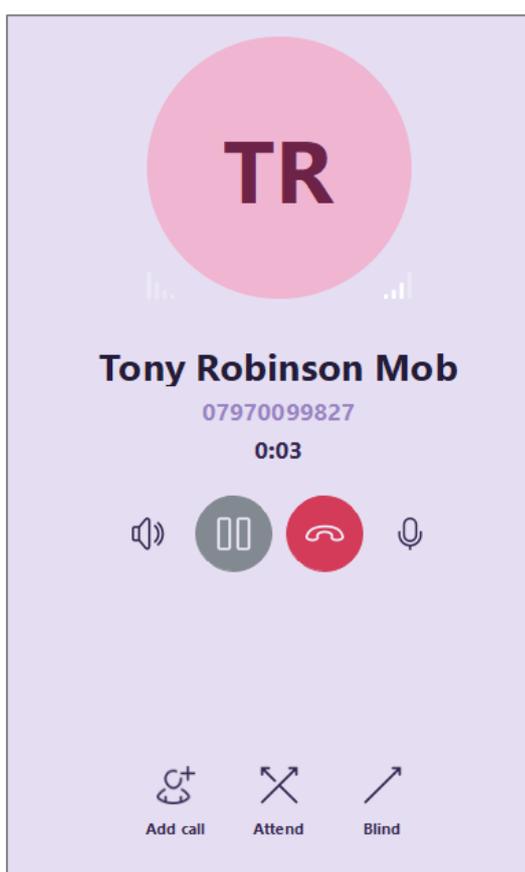

ix. **Selfcare in the Softphone App**

- By clicking onto the Selfcare icon you are taken to range on choices and information categorized into MyGroups, OneNumber, MyDevices, Voicemail. It is in the same format as the Universe for Mobile Selfcare. Any changes you make from one device in the Selfcare pages of the Softphone App will be reflected in the Universe Softphone for Windows and Mac, and the Self Care Portal. You must SAVE each change

- **"My Groups"** which allows you to;
  - o Sign Out or Sign-In to groups that your administrator has allowed you to join
  - o Change the IVR flows if you are an Administrator

- **"One Number"** (the number shared for each device), allows you to;
  - o Choose which phone number Call Forward Always for your One Number should be directed toward

o Choose which phone number Call Forward No Answer for your One Number should be directed toward
o If you leave this blank, calls will ring and will then route to your Universe Voicemail if enabled
o Do not forget to select "Save"

▪ **"My Devices"** which allows you for each device to;
o Choose how long before a called number goes to voicemail for each device
o Select which Caller ID is to be displayed (if available) for outbound calls or One Number is used for each device
o Choose which phone number Call Forward No Answer for your One Number should be directed toward by device

▪ **"Voicemail"** allows you to listen to and delete Voicemails and switch the Voicemail service off
o Voicemail is either on for all devices or off for all
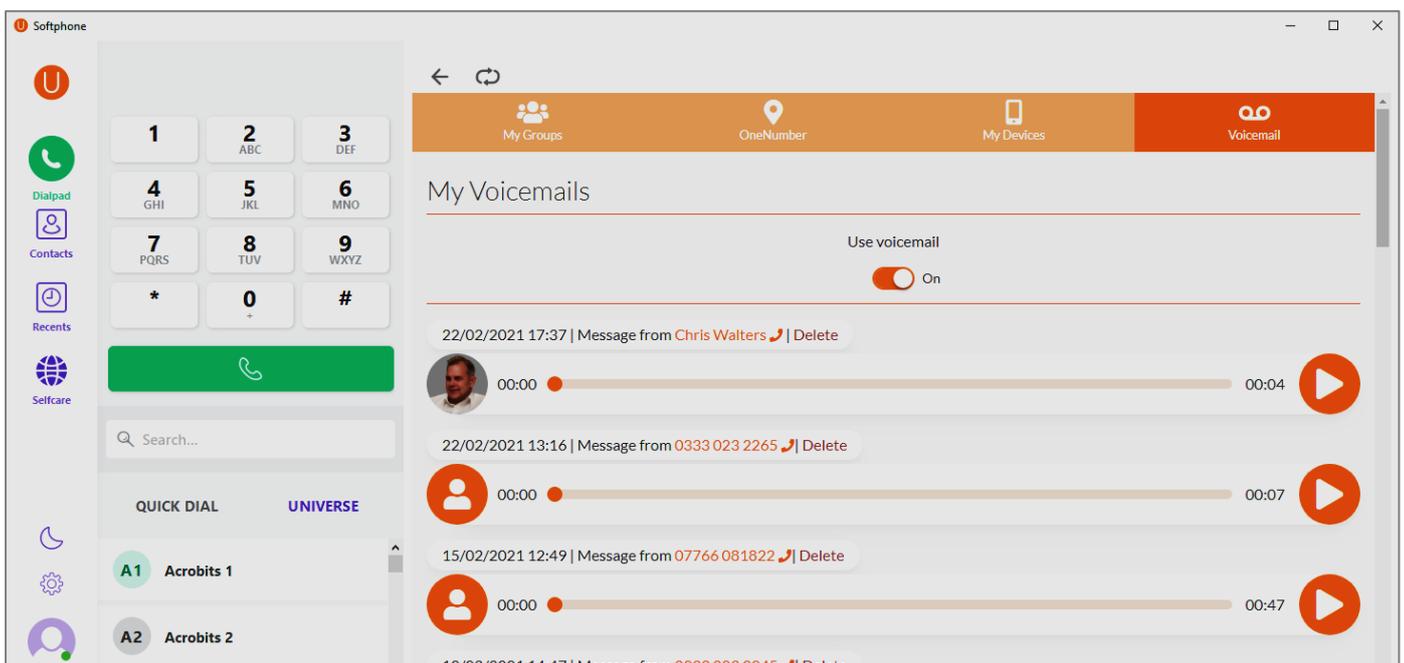
x. To Exit Universe Softphone for Windows and Mac

▪ Go to the bottom of your screen to see the taskbar
▪ Right click on the smaller "U" symbol.
▪ Select Quit
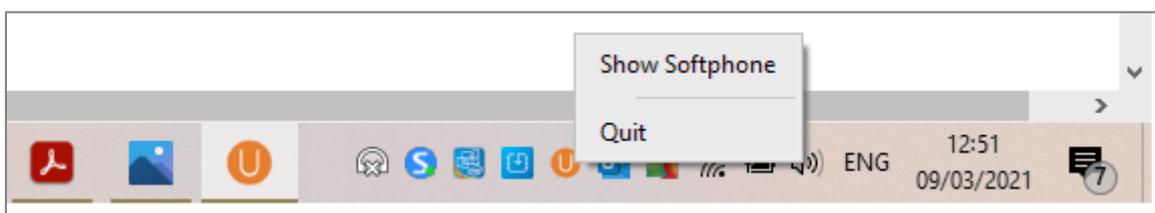
f. To Restart

▪ If you want to restart the softphone immediately, go to the Microsoft Start Menu on the bottom left corner of your screen and select the application