SmartVoice

Desktop Application Installation and User Guide

Shaw Business

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Requirements

Desktop MAC/PC client's requirements

Supported Outlook versions

Shaw Outlook integration will work with the following versions of Outlook:
- 2010
- 2013
- 2016

Operating System

- Mac OS 10.11 El Capitan
- Mac OS 10.12 Sierra
- Mac OS 10.13 High Sierra
- Windows 7 SP1
- Windows 8/8.1
- Windows 10 (Classical view only)

Minimum System Requirements

The installation footprint is approximately 125 megabytes (MB) on OS X and 215 MB on Windows.
For voice calls, a sound card, speakers, and a microphone or a headset are required.

For video calls, a web cam is required.

- A minimum of 2 GB random access memory (RAM) is required.
- A minimum 1.5 GHz CPU is recommended. A dual core CPU is recommended for video calls at a minimum.
- Open Graphics Library (OpenGL) 1.5 or higher is recommended. For high definition (HD) video, the following is recommended:

For high definition (HD) video, the following is recommended:

- HD camera
- HD resolution support in display
- Quad Core x86 or equivalent at a minimum 4 GB RAM

Download and Installation

Download and install the SmartVoice desktop application onto your computer by visiting one of the following URL's:

- Windows: https://deviceconfig.cloudpbx.shawbusiness.ca/dms/DesktopApps/ShawSmartVoiceAppWindows.exe
- Mac: https://deviceconfig.cloudpbx.shawbusiness.ca/dms/DesktopApps/

After downloading the SmartVoice desktop application, you will see an executable file in your download folder.

Click on the executable file to begin the installation wizard.
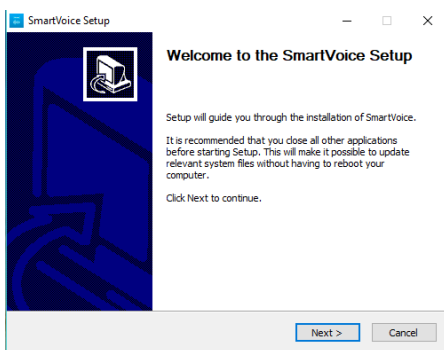
Follow the on-screen instructions to installed

During installation you will be promoted to select if outlook integration is preferred

Selecting Install SmartVoice Outlook Plug in will enable the following features*:

- Presence synchronization between outlook and SmartVoice
- Click to call from Outlook using SmartVoice Client
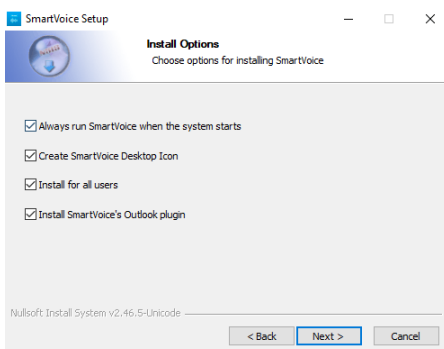

Please note:

- Outlook plugin can be enabled or disabled after installation through the Client

- The current version of this add-in cannot be used if you have Microsoft Office Communicator or Skype installed. You must uninstall these products if you want to use this add-in. Skype for Business can be used at the same time.
- Additionally, administrator rights are required for the Outlook Add-in except for Outlook 2010.

Fig 3.1

After the installation of the SmartVoice desktop application, you will see this icon on the computer's desktop (if you selected Create SmartVoice Desktop Icon), if not you will need to search your computer for the SmartVoice Desktop Client.

**Click the icon to start the soft client which will prompt you to enter your username and password**
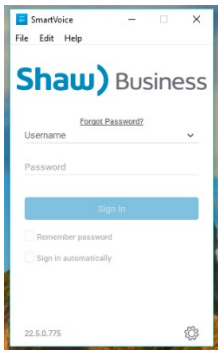
Enter your username and password (refer to welcome email).

Click the "Sign in" button to access the SmartVoice desktop application. If you clicked the check box to enable Outlook integration during installation, you would get the below popup asking for permission to access your Outlook contacts and Calendar. For Outlook integrations features to work, click "Yes".
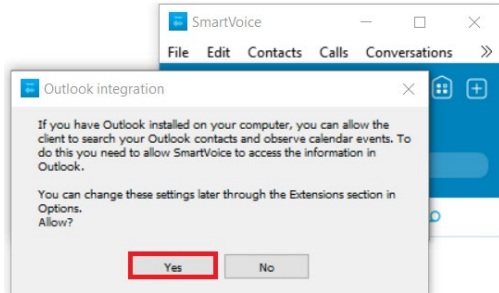
Next, you will get another popup asking if you want to make the SmartVoice app the default calling application. If you want to use SmartVoice as your click to dial default application click "Yes"
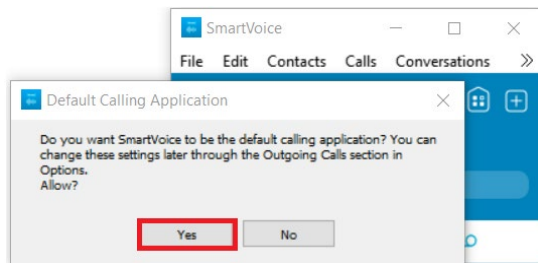
Click the "Sign in" button to access the SmartVoice desktop application
- When the SmartVoice application starts, the dialer page will be presented. Icons on the heading line will vary depending on the feature package selected by your business.
- The above example is based on the SmartVoice application installed on a Windows computer. The screenshots captured above are similar to the look, feel, and functions screen on Mac operating system.
- Please note: users are able to log into the SmartVoice application on one desktop device only. Logging into a second computer with the same account will override the access on the previous computer making the application inaccessible.

Adding or Removing Outlook after Install

Go to Settings

From the drop-down menu select extensions and Enable/Disable the following extensions to add or remove Outlook feature:

- **Enable Outlook Contact Search**
- **Enable Outlook Calendar**
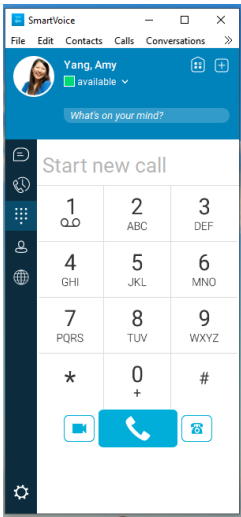- **SmartVoice Outlook Add-in, Gateway Process**
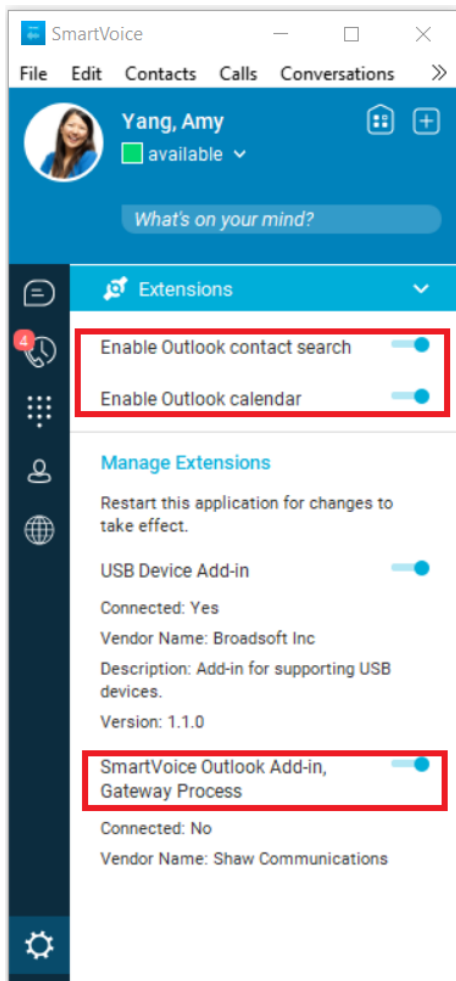
User Guide

This section will walk you through some of the key features of the SmartVoice Client and detail the different options available.

1.0 SmartVoice Client

When you first log in you will be presented with, he SmartVoice Client main screen

1.1 Icon description

My Information – View and update your information, for example, your presence, avatar, and location.

 My Room – This is your permanent communication room. Participants can dial in to your audio bridge.

 Add new Contact

 Chat History – View previous chats.

 Call History – View previous calls.

 Dial Pad – Make calls

 Contacts – View your contacts.

 Directory – Show all contacts of the directory

 **Options– Use for quick access to preferences and Call Settings such as Call Forwarding.**

1.2 Presence

You can set your presence to one status indicated in the following table.

Icon	What It Means
	Automatic presence: This is the Available status where automated presence statuses such as Busy In-call override the Available status. Requires newer presence server (aggregated presence) to show.
	The green presence icon indicates that the user is online and ready for communication. This status is used until you change it and automated presence statuses such as In Call do not override.
	The yellow presence icon indicates that the user is online but has been idle or away from their computer for more than ten minutes
	The red presence icon indicates that the user is busy and does not want to be disturbed. This is an automated presence status.
	The grey presence icon indicates that the user is offline and the only available contact method is calling or leaving a chat message.

A contact's presence can be Available, Away, Busy, or Offline as shown in the following figure.

- **Automatic**
- **Available**
- **Away**
- **Busy**
- **Offline**
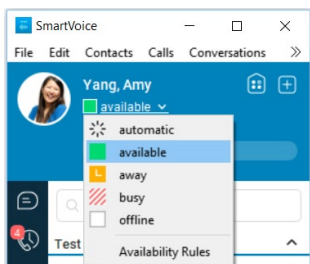
To use presence, you must add the user to your contacts

- Go to directory, select users and add them to your Contacts.
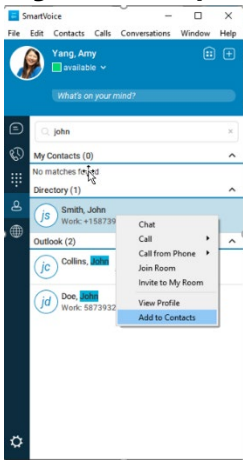- Click on "Contacts" to view them

Note: When you add a user to your Contacts, the user would receive a presence authorization request, until they accept that request, you cannot monitor their presence.
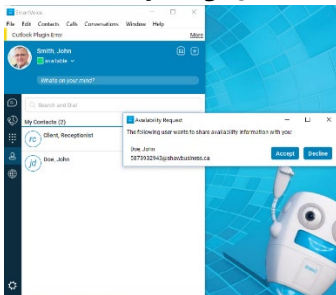
6

1.3 Adding a contact

1) **Go to Contacts**
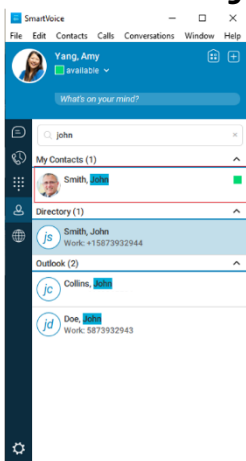2) **Search for a person in your enterprise you would like to add**
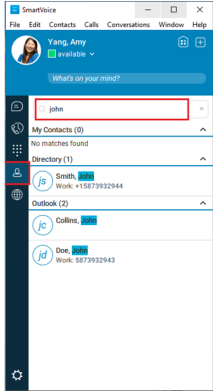
3) **Right click on person and select – Add to Contacts**

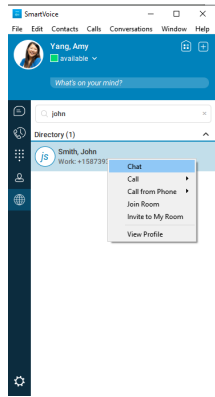4) **The other party "john" in this case will receive an invite.**

5) **If accepted Presence and any images will now be shared between contacts and John is added to Amy's contact directory.**
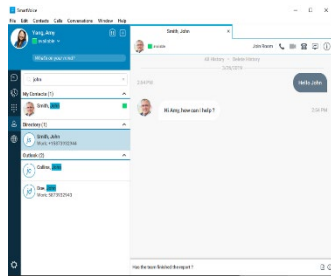
1.4 Start a chat session

1) **Go to Directory**
2) **Search for name of someone in your enterprise (that has SmartVoice)**

3) **Select the name and right Click**
4) **Select Chat**


5) **type your message**

1.5 Using My Room

My Room is an integrated environment designed specifically for collaboration. It is an extension of the user's business phone number, chat environment, and video conferencing experience so collaboration flows naturally from other communication experiences.

- **Instantly host a "My Room" collaboration experience with voice, video, chat, and sharing**
- **Drag & drop participants into the session to quickly add the right people**
- **Include audio participants through a familiar standard telephony bridge**
- **Control the "My Room" session by stopping sharing, and muting and dismissing participants**
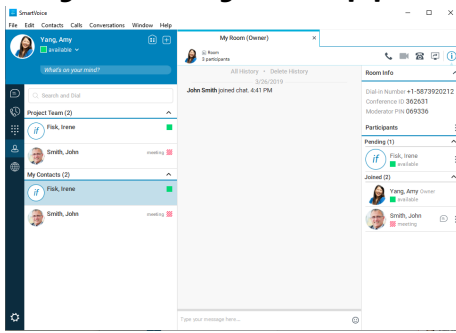

1.5.1 To start My room

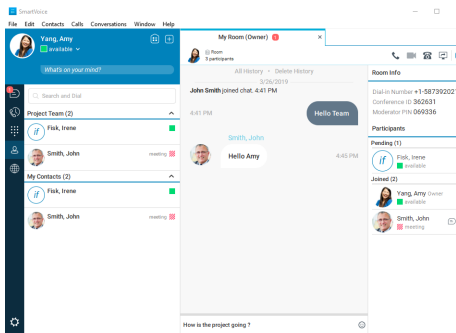1) **Click on "My Room Icon"**
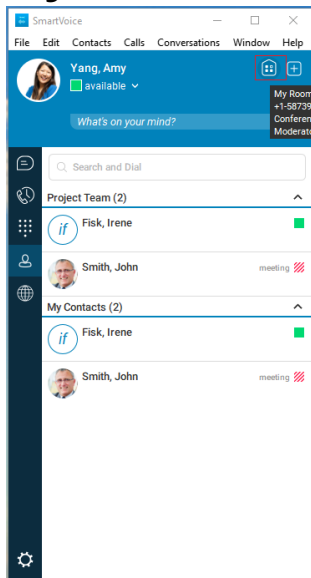
2) **A window will open**

3) **From here you can drag and drop participants into your room**
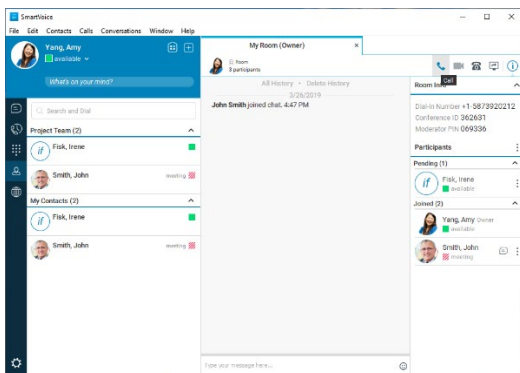

4) **Once participants accept your My room invitation you will now be able to collaborate as a team with group chat**
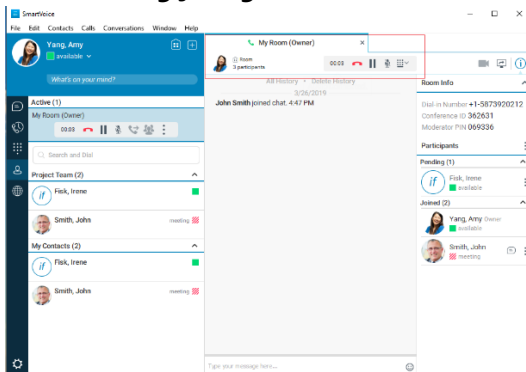

1.5.2 Seamlessly join your conference bridge (if feature is assigned)
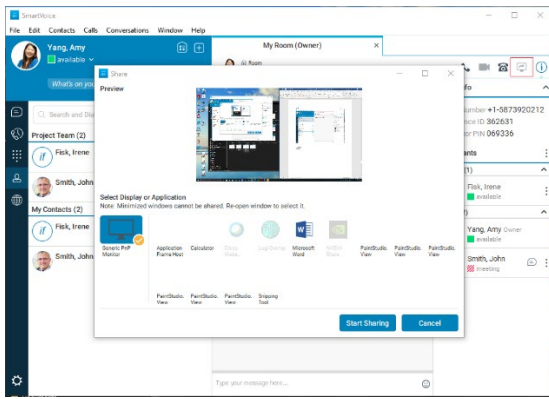
1) **Click on the Phone Icon in my Room**

2) **You will seamlessly join your conference bridge (no need to enter Conference ID or PIN)**

1.5.3 Screen Share

1) **Select the Screen Share Icon in My Room**
2) **Select the specific application to share or your entire monitor display**

Outlook Integration

This feature allows users to integrate Microsoft Outlook (Contacts and Calendar) with their SmartVoice app. When enabled you can:

- search for Outlook contacts on the SmartVoice app
- click to dial from Outlook
- click to chat from Outlook
- Watch the presence of your contacts' Calendar and their phone presence

Note: Please logout and exit any phone or chat application, close Outlook if open; start SmartVoice app first, then start Outlook last.

## 2.1 Outlook Contact Search and calling from SmartVoice app

On the SmartVoice Desktop app, search for an Outlook Contact, there should be search results for Outlook Contacts at the bottom of the app.
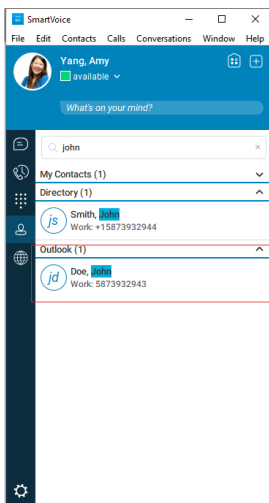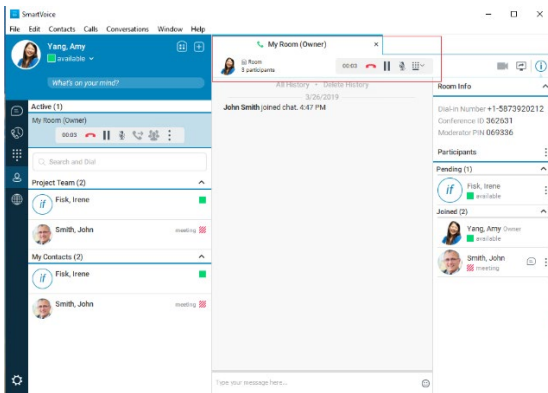

1) Right click on the contact and click "Call"

2.2 Basic Click to Call from Outlook

1) Open an Outlook email
2) position on any of the contacts
3) on the popup screen click the number or three dots (…) to expand the options of the contact.
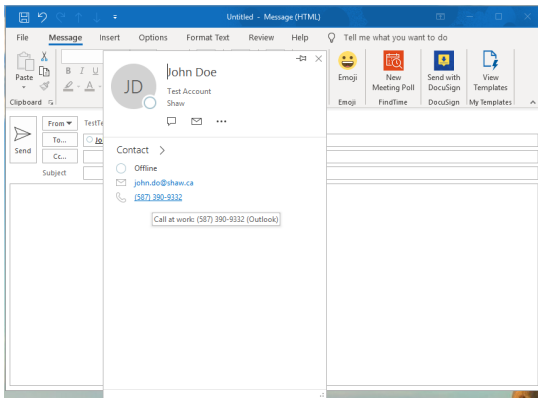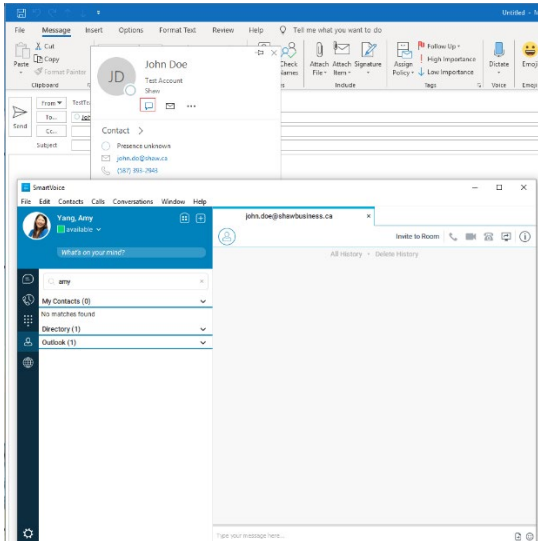

4) Click on the Phone number to launch the SmartVoice App and place the call

Note: There are other calling options like "Call New Number" which gives you the option to specify the number you want to call or make a video call. Explore all the calling options for a contact on Outlook email.

2.3 Instant Messaging and Presence from Outlook

1) On a new or existing email, position on one of the email contacts that is online
2) Click on the chat bobble to initiate an instant messaging session with that contact using SmartVoice app.

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