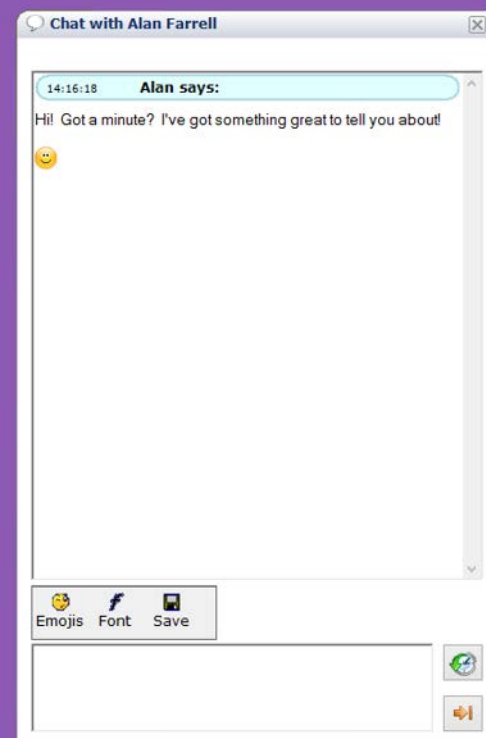


Getting started Phone Buddy 3

HERE'S HOW GUIDE



Introducing Phone Buddy

Phone Buddy is a great little app for Windows PCs and laptops that brings the power of your phone system to your screen. It gives you:

- Quick and easy access to your portal website without having to log on
- Screen popups on your computer that show when you have incoming calls, voicemail or texts – and who it's from
- Access to today's made, answered and missed calls, plus text messages and alerts
- Access to voicemail messages
- Access to your company address book that allows you to Click-2-Talk, leave voicemail messages, send emails, and instant messages
- A way to let colleagues know if you're free to take a call, busy or away from your desk.

Phone Buddy can integrate with a number of CRM systems, including Salesforce to give you screen popups that identify callers from those contact lists too. It also lets you pick up and dial telephone numbers direct from a document or web page.

If you are a System Administrator and have a Gold subscription, you also need Phone Buddy to manage your Call Recording downloads, file verification and deletions.

First things first...

You want to get started using Phone Buddy, but before you start, there are a few things you need to know and do.

Phone Buddy will only operate with Microsoft Windows-based systems with Windows Vista SP2 and later installed.



If you already have an earlier version of Phone Buddy (version 2 or earlier) installed on your computer or laptop, you need to uninstall that program before you start.

Phone Buddy runs in the background. As long as you don't Exit the programme, it will automatically activate whenever your computer or laptop is turned on.




Here's how to...


install Phone Buddy

Log on to the web portal. In your web browser, go to www.telephony-cloud.com and enter your username and password.

- Click on the **Support** tab and select **Downloads** from the pop-down menu.
- Scroll down to the **User Tools for Download** list and click on the download  icon in the Phone Buddy **Actions** column.
- Run the installer.
- When the app has finished installing, you will be prompted to start the program. Or you can double-click the Phone Buddy icon: 
- In the log-on screen, enter the username and password you use for the web portal.
- Phone Buddy is now operational and you'll see the Phone Buddy icon in the system tray at the bottom of your screen.

User Tools for Download
This panel lists the tools available for you to download.

Title	Category	Version	Updated	Size	Actions
Altos Microsoft Outlook Dialler (32 bit)	Office	1.10	09 Jan 2012	4.8Mb	
Altos Microsoft Outlook Dialler (64 bit)	Office	1.10	09 Jan 2012	5.0Mb	
Altos Phone Buddy	Productivity	2.23	16 Feb 2014	4.8Mb	

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Phone Buddy icon in your system tray.



Phone Buddy runs in the background. As long as you don't Exit the programme, it will automatically activate whenever your computer or laptop is turned on.

Here's how to...

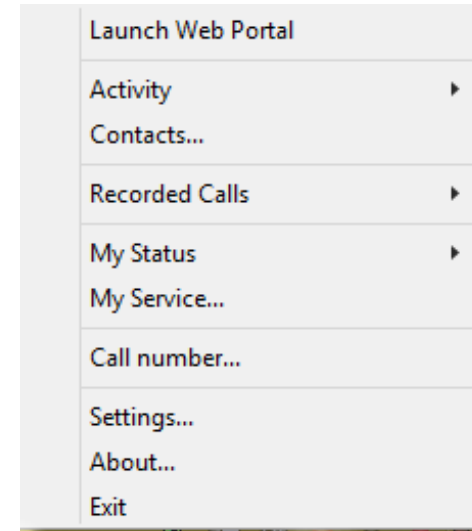
navigate Phone Buddy

Look for the Phone Buddy icon in the system tray at the bottom of your screen.



Right click the icon to see the menu of program options:

- **Launch Web Portal** – automatically launches and logs you on to the portal.
- **Activity** – access to recent alerts, calls, voicemails, texts and faxes.
- **Contacts** – access to your internal directory and shared contacts, and to call, email, instant message or leave a voicemail for them.
- **Recorded Calls** – (System Administrators only) search, download, verify or delete call recordings.
- **My Status** – to indicate whether you're available to take a call, busy or away from your desk.
- **My Service** – a dashboard you can position on your screen for quick access to all the best Phone Buddy features.
- **Call Number** – Click-2-Talk a telephone number typed in or copied from a web page or document.
- **Settings** – to set your Phone Buddy preferences.
- **About** – information about Phone Buddy.
- **Exit** – to shut down Phone Buddy.



Click **Settings** and choose the **Miscellaneous** tab. Check “**Start when Windows starts**” and Phone Buddy will always start up when you log on to your computer.

Here's how to...

set your Phone Buddy notifications

The Settings panel allows you to set how Phone Buddy notifies you of new calls, voicemail messages, texts and faxes.

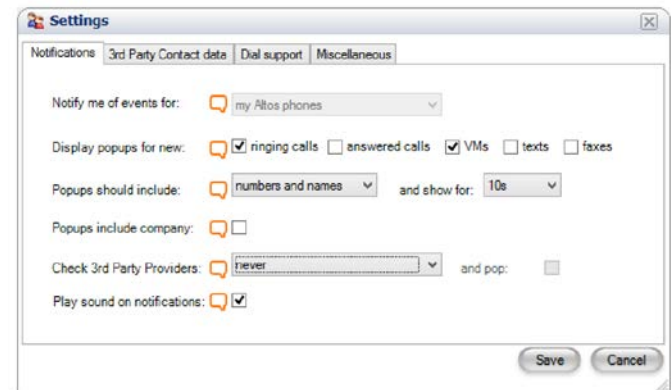
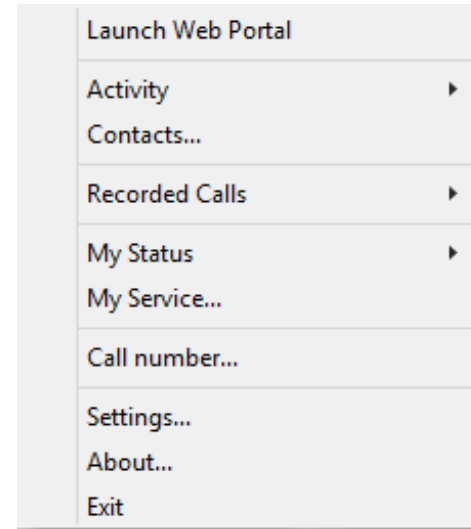
You can set Phone Buddy to display a popup with or without callers' names, telephone numbers or company name and set how long the popups stay on your screen.

- Right click the Phone Buddy icon and click on **Settings**.
- In the **Notifications** tab, define the settings you'd like for your popups.

Phone Buddy automatically uses your phone network address books to identify the people calling you. But Phone Buddy can also integrate with certain external contact database services. These are described later.

If you plan to use these external services to identify your callers, use the **Check 3rd Party Providers** drop-down menu. The options are:

- **Never** – only use your phone network address books
- **If no match** in your phone network contacts
- **Only** – only use your external contact database service.



Here's how to...

link with your external CRM service

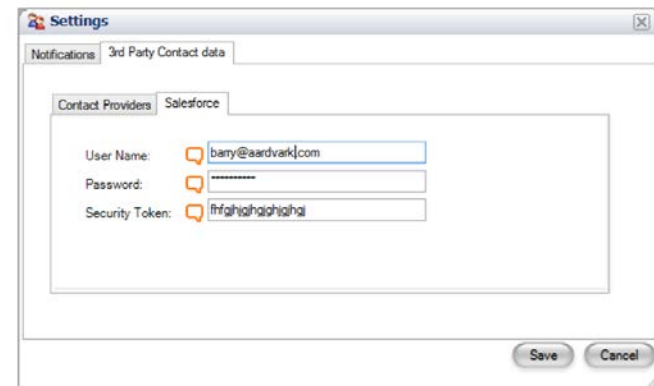
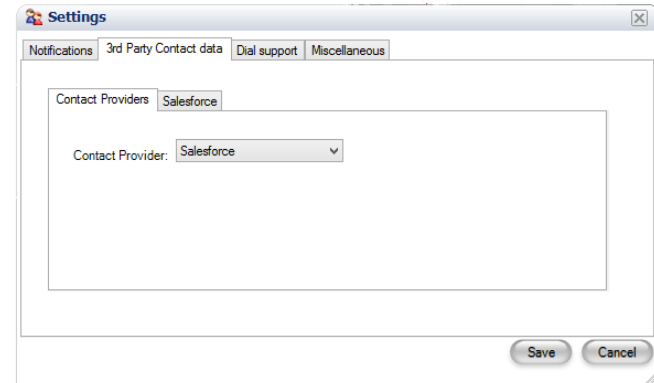
If you use Salesforce, Zoho or Microsoft Outlook to manage your contact database, you can set Phone Buddy to display popups when contacts on those lists call you.

- Right click the Phone Buddy icon and click on **Settings**.
- Click on the **Contact Providers** tab and use the drop-down menu to select your external CRM service provider.
- Click **Save**.

For Salesforce and Zoho, click on the secondary tab and enter your username, password (if required) and security token.

Phone Buddy also provides options to link to generic CRM programs and web-based applications.

Visit the web portal and see the complete setup and user guide for further information on connecting to these services, including links to download Zoho and Salesforce security tokens.






Here's how to...

set your Status

You can use Phone Buddy to show other users on your network if you're free to take a call, busy or away from your desk.

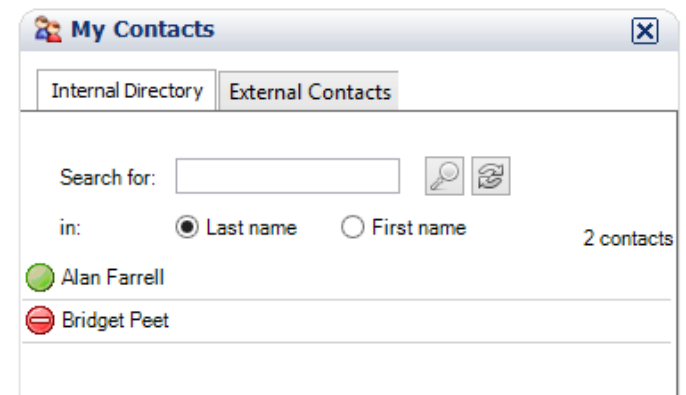
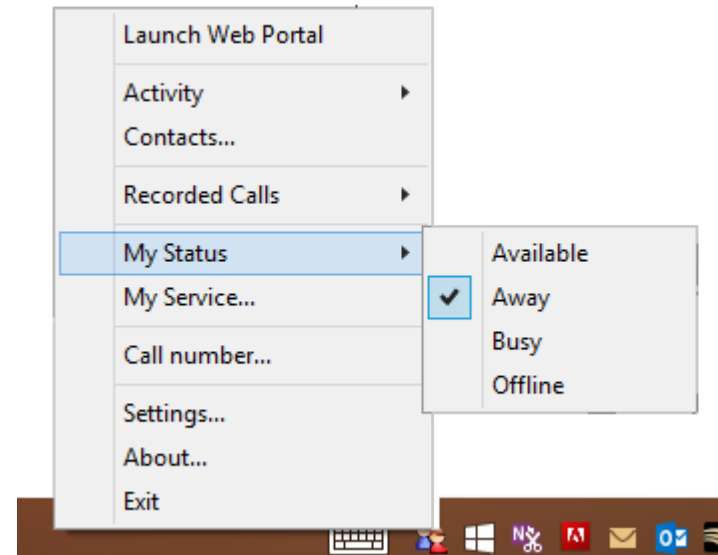
- Right click the Phone Buddy icon and click on **My Status**.
- Tick your status.

When colleagues look you up in **My Contacts**, they'll see an icon next to your name:

-  Available
-  Away from desk
-  Busy

If there is no icon next to a person's name, they are offline.

Don't forget to change your Status, especially if you've ticked the "Busy" or "Away from desk" options.



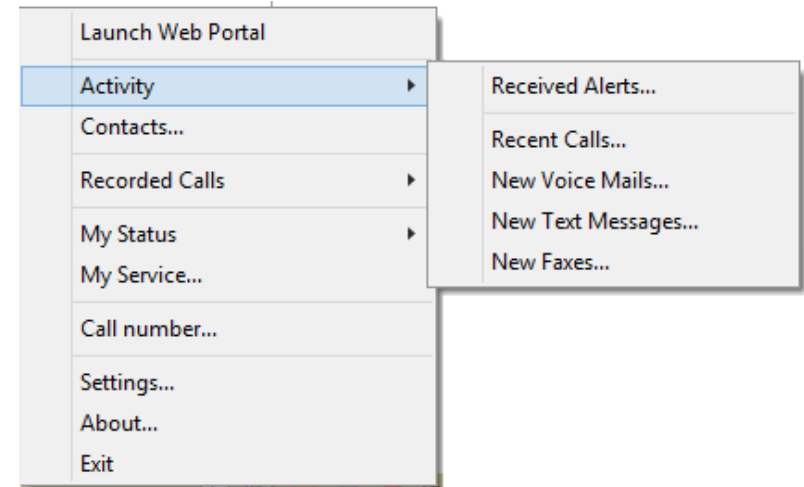
Here's how to...

check who's been trying to contact you

Right click the Phone Buddy icon and click on **Activity**.

- Click on **Received Alerts** to see any **Alerts** or **Instant Messages** you've missed while your computer was turned off.
- Click on **Recent Calls** to check and return any missed calls.
- Click on **New Voice Mails** to listen to your voicemail.
- Click on **New Text Messages** to see your new text messages.
- Click on **New Faxes** to read any new faxes.

Right click any entry in the **Recent Calls** list to return that call.



Here's how to...

make calls via Phone Buddy

There are a number of ways you can use Phone Buddy to make calls, leave voicemails, start IM chats and send texts and alerts from your desktop:

- You can contact people via your phone network's internal and external address books.
- You can copy and paste telephone numbers from web pages, documents and application screens.
- You can simply type the number you want to call.
- You can click and return calls in your Phone Buddy **Activity** panel lists.

Phone Buddy uses “Click-2-Talk” to make your calls. This is a three-part process:

- You click on a number to tell your phone system you want to make a call
- Your phone system sets up the call and rings your phone to let you know it's ready
- You pick up your phone and your phone system places the call to the number you clicked.





Here's how...

to find and contact your colleagues

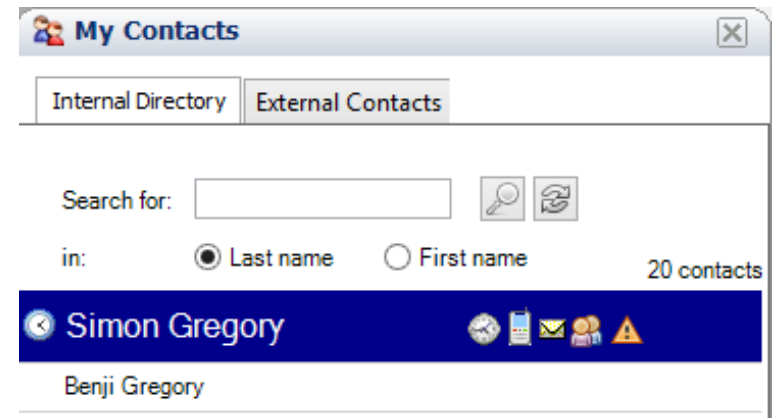
Right click the Phone Buddy icon and click on **My Contacts**.

Click on the **Internal Directory** tab. If you've got a long list of entries, you can use the **Search for** box to find individuals quickly.



When you highlight a colleague's name, you will see different ways to contact them. The options depend on whether their directory entry includes a mobile number and email address, as well as their normal office phone number, and whether they also use Phone Buddy. Click on the appropriate icon to make a call, send an email or leave a voicemail etc:

-  Gives you a menu to **Click-2-Talk** their number, leave a **voicemail**, or send a **text**.
-  Let's you **email** them (if they have an email address).
-  Let's you send an **Instant Message** (if their Phone Buddy is active).
-  Let's you send them an **Alert** (if their Phone Buddy is active).

If their Phone Buddy is not active, IM messages and Alerts will be delivered when they next log on.



Other Phone Buddy icons you can see next to your contact's entry are:

-  The **Status** icon – this changes to indicate whether the person is free to take a call, away from their desk or busy.
-  The **Time Zone** icon let's you know what time-zone their Phone Buddy is logged on in.

Here's how to...

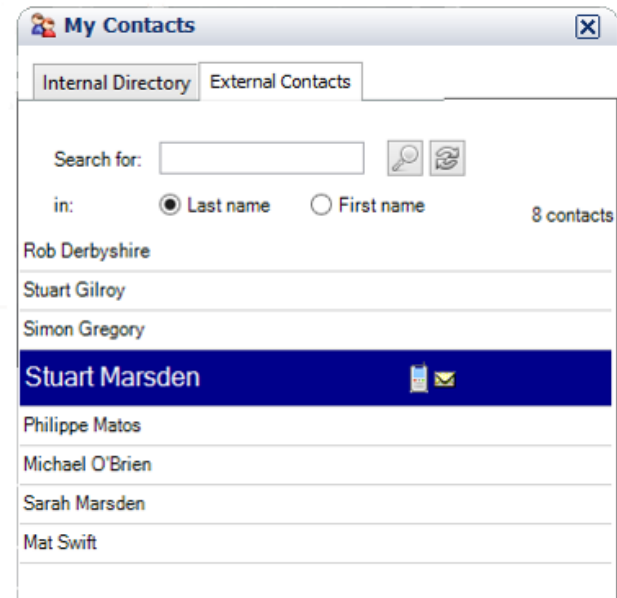
find and contact external parties

You can find and contact people on your company's external shared contacts list the same way you do for colleagues.

- Right click the Phone Buddy icon and click on **Contacts**.
- Click on the **External Contacts** tab and use the **Search for** box to find individuals on your company phone network.

When you highlight a colleague's name, you will find different ways to contact them. The options depend on whether their directory entry includes a mobile number and email address, as well as their normal office phone number.

You can leave the My Contacts panel open on your screen and move it to a convenient position.



Here's how to...

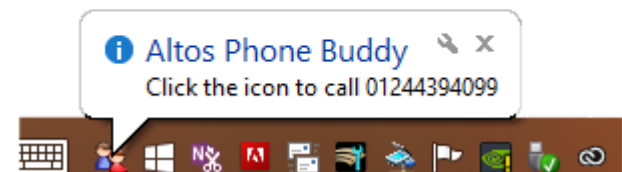
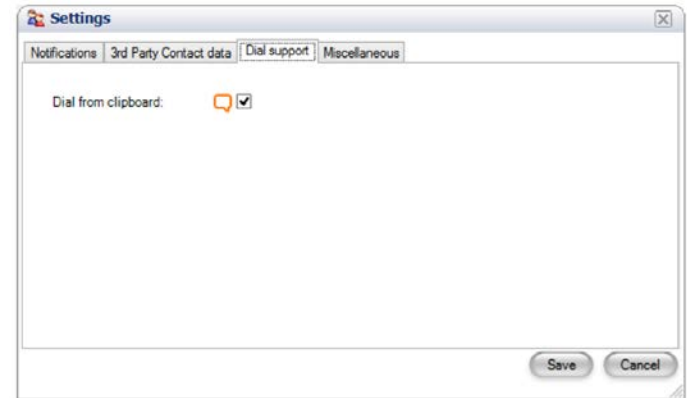
use Clipboard Dialling

If you highlight a telephone number in a document or webpage or application on your screen, and copy it to your clipboard, Phone Buddy will call it for you.

- Right click the Phone Buddy icon and click on **Settings**.
- Click on the **Dial Support** tab, check the box **Dial from clipboard**, and click **SAVE**. You only have to do this bit once!

Open a web page or document with the number you want to call.

- Highlight the number and copy it to your clipboard. There are a number of ways you can do this: press CTRL C on you keyboard, or right click the highlighted number and select Copy from the drop-down menu.
- Look at the Phone Buddy icon at the bottom of your screen. Check it's the number you wanted and click the icon. Phone Buddy will set up your call using **Click-2-Talk**.
- Click on the **X** in the bubble to cancel the call.

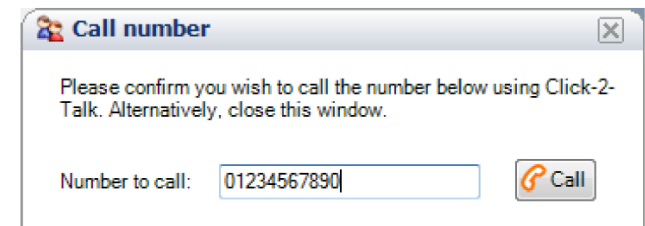
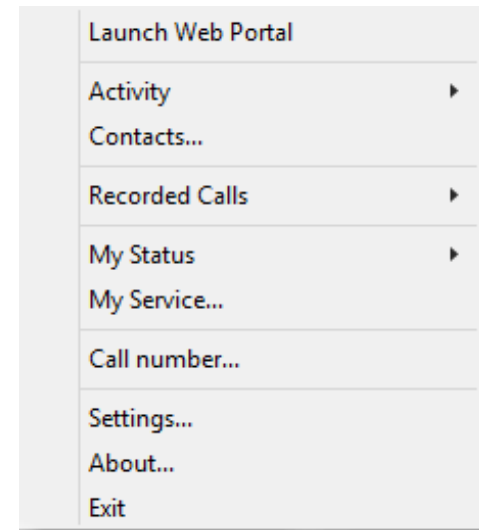


Here's how to...

use Call Number

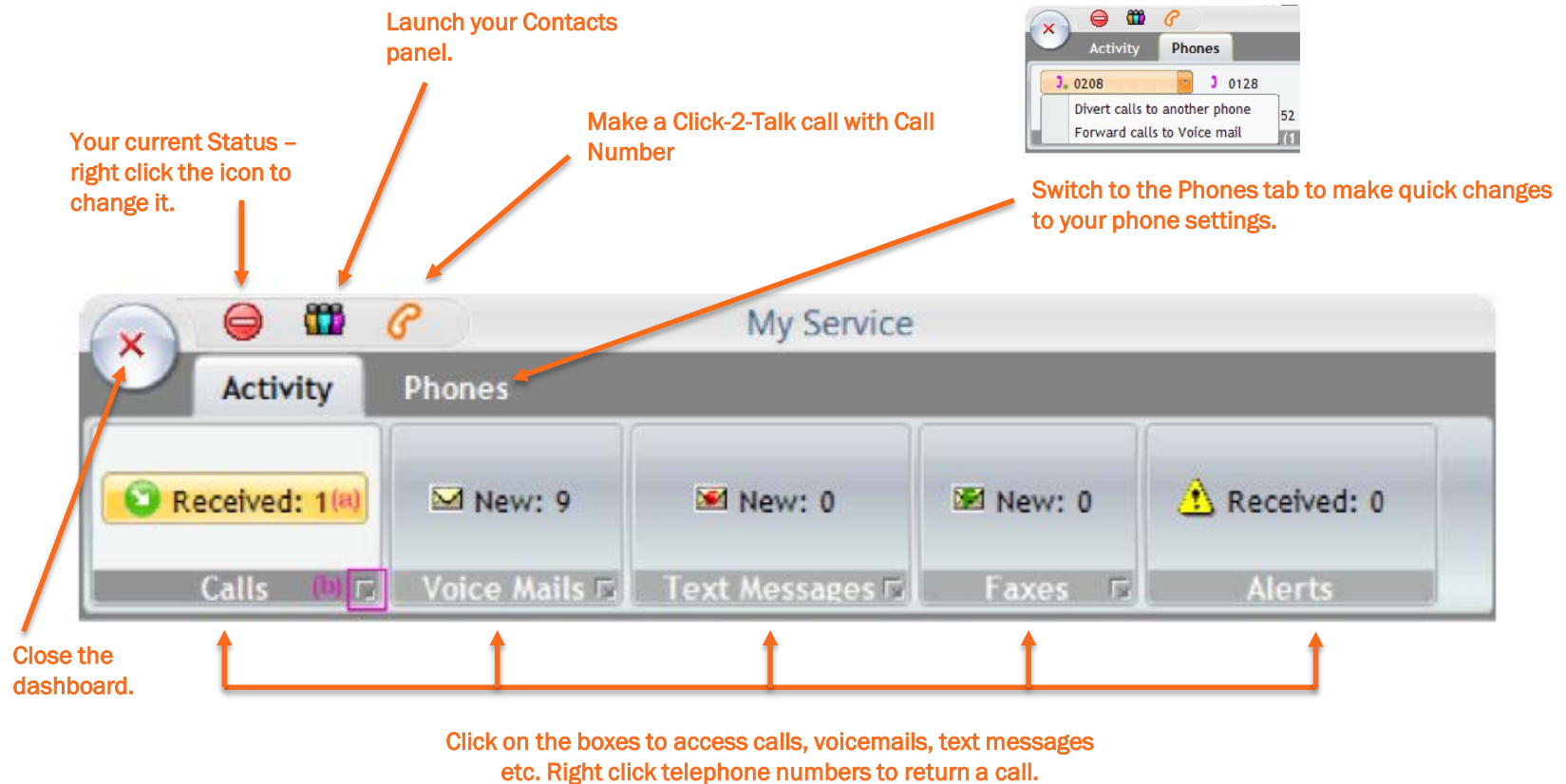
Sometimes you just want to type the number you want to call or adjust a number that you've copied and pasted from the clipboard.

- Right click the Phone Buddy icon and click **Call Number**.
- Type the number you want to call and click **Call**, or
- Press CTRL V to paste a number you've copied to your clipboard and click **Call**.



“My Service” - the Phone Buddy dashboard

The **My Service** feature gives you a Phone Buddy dashboard that you can keep open on your screen in a convenient spot. The dashboard provides an overview of your current calls and voicemail etc, and gives you quick access to useful features, including changes to your phone settings. Right click the Phone Buddy icon and click on **My Service**.



You are now up and running with Phone Buddy 3. We hope you enjoy it.

More Here's How Guides:

- **Here's How** – Getting started for Users
- **Here's How** – Getting started for System Administrators

Find more information in the User Manual, which you can find on the Telephony Cloud Portal. Download the document from the Documents tab or search and read onscreen from the Help button.