Smart Office Client
Quick Start Guide

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Notes, Tips, Cautions, and Warnings

The Smart Office Client guide uses the following document conventions.

**Note**
Provides additional background information, advice, or a general comment associated with a segment of information.

**Tip**
Provides additional useful information in a procedure.

**Caution**
Indicates a hazardous situation and advises the user that failure to take or avoid a specified action could result in equipment damage or data loss.

**Warning**
Indicates a hazardous situation and advises the user that failure to take or avoid a specified action could result in death or serious injury.
This guide describes some Smart Office Client features and services for desktop and mobile client users.

**Note**
This guide does not describe every feature available. For a complete description of Smart Office Client features and services, see the *Smart Office Client User Guide* (630-02559-01).

### Smart Office Client main window

Smart Office Client desktop and mobile versions share many buttons and features.

The default tabs on your Smart Office Client application are:

- **Profile** — Presence, issue reporting, logout, and logout and close options
- **Favorites** — Favorite contacts, with their associated actions, and services
- **Contacts** — Searchable address books and contact management
- **Chat** — Instant messaging and message management
- **History** — Calls, messages, and conferences initiated and received
- **Sessions** — Currently active calls
- **Dialpad** — Application dialpad for manual dialing
- **Collaboration** — Conference information and capabilities for users with Collaboration service

**Note**
Your organization can set up customized tabs, such as Extras and News, if required. These custom tabs do not appear in the default installation.

*Figure 1: Smart Office Desktop and Mobile Clients*
Message waiting indicators

When you have messages, the Smart Office Desktop Client displays a notification on the navigation bar and on the Dialpad screen.

Figure 2: Desktop client — message waiting indicators
When you have messages, the Smart Office Mobile Client displays a notification on the Contacts and Favorites screens.

**Figure 3: Mobile client — message waiting indicators**

<table>
<thead>
<tr>
<th>Contacts</th>
<th>Favorites</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Personal</strong></td>
<td><strong>MeetMe Audio ... service</strong></td>
</tr>
<tr>
<td><strong>Global</strong></td>
<td><strong>Call Grab service</strong></td>
</tr>
<tr>
<td><strong>Mobile</strong></td>
<td><strong>Voicemail service</strong></td>
</tr>
<tr>
<td>Contact</td>
<td><strong>Donna Miller voice</strong></td>
</tr>
<tr>
<td>Brown, Laura</td>
<td><strong>Kim Wong chat</strong></td>
</tr>
<tr>
<td>Lee, Scott</td>
<td><strong>Kim Wong video</strong></td>
</tr>
<tr>
<td>Miller, Donna</td>
<td><strong>Laura Brown chat</strong></td>
</tr>
<tr>
<td>Wong, Kim</td>
<td></td>
</tr>
</tbody>
</table>
Listening to the mobile client voicemail

To listen to the voicemail on the Smart Office Mobile Client, tap the ellipsis in the top right corner, and then tap **Service Shortcuts>Voicemail**.

**Figure 4: Mobile client - voicemail service**

<table>
<thead>
<tr>
<th>Manage</th>
<th>Back</th>
<th>Service Shortcuts</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

You can add those Services to your Favorites via the Settings page.
Creating Smart Office Client Favorites

Favorites are shortcuts to actions you perform often. From Favorites you can send an IM or make an audio or video call to a Contact with one click or tap.

Creating a Favorite on the desktop client

On the Contacts screen, click a name to open the Contact profile.

Right-click on one or more of the actions: phone, video, or IM.

When you right-click an action, a blue star appears next to that action, indicating that a shortcut has been added to your Favorites screen.

Figure 5: Opening a profile on the desktop client
In the example above, when you click video and chat for Laura Brown, the Favorites screen will look like the following figure.

You can drag and drop the Favorites tiles to resort them.

Figure 6: Desktop client Favorites screen
To place a call, click a voice or video tile. To send an IM, click a chat tile.

**Figure 7: Opening a chat window**

To add and remove call services on the Favorites screen, refer to "Changing Smart Office Desktop Client settings" in Changing Smart Office Client settings.
Creating a Favorite on the mobile client

On the Contacts screen, tap a contact name to open the profile. On the profile, tap Manage Favorites.

**Figure 8:** Opening the mobile client contact profile

On the Manage Favorites screen, tap a star beside one or more entries to add to your Favorites. The entries you add display a colored in blue star. Tap OK to save the changes.

**Figure 9:** Managing mobile client Favorites
The entries you selected now appear in your Favorites.

To make a call or send a message, long tap on the Favorite to open the options menu.

**Figure 10:** Mobile client Favorites options

To add and remove call services on the Favorites screen, refer to "Changing Smart Office Mobile Client settings" in Changing Smart Office Client settings.
Transferring a call from the Smart Office Client

Smart Office Clients support blind transfer: you can transfer a call to a third party without speaking to the third party yourself.

Initiating a blind transfer from the Smart Office Desktop Client

In an active call, click the **Show menu** icon and then click **Blind Transfer** in the pop-up menu.

**Figure 11:** Blind transfer from the desktop client

The screen prompts you to select a contact from Contacts or Favorites, or by entering a number in the dialpad. You can cancel the transfer operation or end the call before the target answers. The call will remain on hold until you take it off hold or transfer successfully to another party.
For example, you can go to the Contacts screen and right-click the contact you want to transfer to. Click one of the Transfer Call to options.

**Figure 12:** Blind transfer using Contacts
You can also transfer a call from the Favorites screen or dialpad.

**Figure 13: Blind transfer using Favorites and dialpad**

During the transfer you will see a “Transferring ...” message in the call window. The call you are transferring will be on hold.

“Transferred Call” lets you know that the target has received the transferred call.

**Figure 14: Desktop client - call transferred**
Initiating a blind transfer from the Smart Office Mobile Client

In an active call, tap Transfer and select Dialer or Contacts to access a contact number.

Figure 15: Blind transfer from the mobile client
For example, you can tap **Dialer**, enter a number, and then tap the **Call** icon.

**Figure 16**: Transferring a call from the mobile client dialpad
You can also tap **Contacts** and then tap or enter a contact name to transfer the call.

**Figure 17:** Transferring a call from the mobile client Contacts

During the transfer you will see a “Transferring...” message in the call window. The call you are transferring will be on hold.

“Call Transferred” lets you know that the target has received the transferred call.

**Figure 18:** Mobile client - call transferred
Starting Collaboration from the Smart Office Client

If your account has the Collaboration service assigned, you can access the collaboration menu by clicking the collaboration icon located on the navigation bar.

Collaborating on the desktop client

You can send collaboration links by email or IM.

Click the **Collaboration** tab to see all the information you need to initiate a collaboration session:

- Click **Start Collaboration** to autostart a Smart Office Collaboration client in a browser (Safari on the Mac platform, Internet Explorer on Windows).
- Click **Invite by Email** to send Collaboration details in your default mail service.
- Click **Copy to clipboard** to copy the room details so that you can paste them in an email or browser.
- Click the URL to open a Smart Office Collaboration client in a browser (Safari on the Mac platform, Internet Explorer on Windows).

Figure 19: Desktop client Collaboration screen
Collaborating on the mobile client

You can send collaboration links by email or IM.

Tap the **Collaboration** tab to see all the information you need to initiate a collaboration session:

- Tap **Start Collaboration** to autostart a Smart Office Collaboration client in a browser.
- Tap **Invite by Email** to send Collaboration details in your default mail service.
- Tap **Copy to clipboard** to copy the room details so that you can paste them in an email or browser.
- Tap the **URL** to open a Smart Office Collaboration client in a browser.

**Figure 20:** Mobile client Collaboration screen
If you have already installed the GenCollab application on your mobile device, tap **Join Conference**. If the application is not installed, tap the Google Play Store or Apple App Store icon to download the application.

**Figure 21:** Collaboration browser on a mobile device
Changing Smart Office Client settings

The Settings tab is located at the bottom of the navigation bar.

Changing Smart Office Desktop Client settings

To select a language, click Settings>Application Settings. Select a language and click Accept to confirm the setting.

Figure 22: Application Settings on the desktop client
To adjust microphone, speaker, and camera settings, click **Settings>Device Settings**. Adjust your device settings and click **Accept** to confirm the settings.

**Figure 23: Device Settings on the desktop client**
To adjust what services appear in your Favorites screen, click **Settings > Service Settings**. Select or deselect a service.

**Note**
The MeetMe Audio Conference and Call Grab services are available only if your administrator has assigned them to your profile.

**Figure 24:** Service Settings on the desktop client
Changing Smart Office Mobile Client settings

In your mobile client, tap **Settings** to adjust the application settings.

**Figure 25:** Settings on the mobile client

<table>
<thead>
<tr>
<th>Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Settings</td>
</tr>
<tr>
<td>Language Settings</td>
</tr>
<tr>
<td>Vibration Settings</td>
</tr>
<tr>
<td>Log Settings</td>
</tr>
<tr>
<td>Add or Remove Services to Favorites</td>
</tr>
<tr>
<td>Boost Settings</td>
</tr>
<tr>
<td>Calling Mode - WiFi</td>
</tr>
<tr>
<td>Calling Mode - Cellular Data</td>
</tr>
<tr>
<td>My Mobile Number</td>
</tr>
</tbody>
</table>
To select a language, tap **Language Settings>Preferred Language**. Select a language and tap **Save** to confirm the setting.

**Figure 26: Language Settings on the mobile client**

<table>
<thead>
<tr>
<th>Preferred Language</th>
<th>English</th>
</tr>
</thead>
</table>

- English
- Français
- Português
- Español
To enable or disable vibration for calls and messages, tap **Vibration Settings** and select or deselect the call and IM modes. Tap **Save** to confirm the settings.

**Figure 27:** Vibration Settings on the mobile client

<table>
<thead>
<tr>
<th>Save</th>
<th>Vibration Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PREFERRED SETTINGS</td>
</tr>
<tr>
<td>Call Mode</td>
<td>✔️</td>
</tr>
<tr>
<td>IM Mode</td>
<td>✔️</td>
</tr>
</tbody>
</table>
To set the level of logs sent during issue reporting, tap **Log Settings** > **Log Level**. Select a log level and tap **Save** to confirm the setting.

**Note**
You can control the amount of logging information by setting different log levels, which impacts the mobile's battery life.

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**Figure 28:** Log Settings on the mobile client

<table>
<thead>
<tr>
<th>Log Level</th>
<th>DEBUG</th>
<th>INFO</th>
<th>WARN</th>
<th>ERROR</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Save</strong></td>
<td>Log Settings</td>
<td>Cancel</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note**
The default log level is set through the config.json file, which administrators can alter.
The following table outlines the different log levels:

**Table 1: Log levels**

<table>
<thead>
<tr>
<th>Log Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DEBUG</td>
<td>This log shows debug log messages that are useful only during deployment, and shows the message levels lower in this list.</td>
</tr>
<tr>
<td>INFO</td>
<td>This log shows the expected log messages for regular use, and shows the message levels lower in this list.</td>
</tr>
<tr>
<td>WARN</td>
<td>This log shows the possible issues that are not yet errors, and shows the message levels lower in this list.</td>
</tr>
<tr>
<td>ERROR</td>
<td>This log shows the issues that have caused errors.</td>
</tr>
<tr>
<td>VERBOSE</td>
<td>This log is the lowest practical level of granularity for gathering client data, and is usually used to comprehend difficult issues. The log level for iOS is always VERBOSE.</td>
</tr>
</tbody>
</table>

To adjust what services appear in your Favorites screen, tap **Add or Remove Services to Favorites** and select or deselect a service. Tap **Save** to confirm the settings.

**Figure 29: Service Settings on the mobile client**

<table>
<thead>
<tr>
<th>Save</th>
<th>Service Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Select the service you want to see in your favorites</td>
</tr>
</tbody>
</table>

**SERVICES**

- MeetMe Audio Conference ✅
- Call Grab ✅
- Voicemail ✅
To assign a call grab number to use in a call boost, follow "Configuring the call boost settings on the Smart Office Mobile Client" (refer to Initiating a call boost on the Smart Office Mobile Client).

To select the preferred calling mode for wifi, tap **Calling Mode - WiFi**. Select a calling mode and tap **Save** to confirm the setting.

**Note**
Refer to the Calling Mode - WiFi screen for an overview of the different calling modes.

**Figure 30: Wifi Calling Mode on the mobile client**

<table>
<thead>
<tr>
<th>Save</th>
<th>Calling Mode - WiFi</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Select how calls will be made when connecting with WiFi:</td>
</tr>
<tr>
<td></td>
<td>- Blocked: No calls can be initiated (you can still receive calls)</td>
</tr>
<tr>
<td></td>
<td>- Internet Connection: Calls will use the data connection</td>
</tr>
<tr>
<td></td>
<td>- Cellular Call: Calls will be initiated using the mobile dialer</td>
</tr>
<tr>
<td></td>
<td>- Call Me Back: You will first receive a call on your mobile and then be connected</td>
</tr>
<tr>
<td></td>
<td>- Ask on Every Call: You will be prompted to make a choice on every call</td>
</tr>
</tbody>
</table>

- Blocked
- Internet Connection
- Cellular Call
- Call Me Back
- Ask on every call
To select the preferred calling mode for cellular data, tap **Calling Mode - Cellular Data**. Select a calling mode and tap **Save** to confirm the setting.

**Note**
Refer to the Calling Mode - Cellular Data screen for an overview of the different calling modes.

**Figure 31:** Cellular Data Calling Mode on the mobile client

<table>
<thead>
<tr>
<th>Save</th>
<th>Calling Mode - Cellular Data</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Calling Mode</strong></td>
<td>Internet Connection</td>
</tr>
<tr>
<td>Blocked</td>
<td>Internet Connection</td>
</tr>
<tr>
<td></td>
<td>Cellular Call</td>
</tr>
<tr>
<td></td>
<td>Call Me Back</td>
</tr>
<tr>
<td></td>
<td>Ask on every call</td>
</tr>
</tbody>
</table>
To enter your mobile number, tap **My Mobile Number** > **My Mobile...** and enter the mobile number. Tap **Save** to confirm the setting.

**Note**
This mobile number is used for the Calling Mode option Call Me Back.

**Figure 32:** Mobile Number on the mobile client

<table>
<thead>
<tr>
<th>Save</th>
<th>My Mobile Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**My Mobile...**

Enter your mobile number
When in a VoIP call, tap the **Boost** icon to transfer the active call to the cellular call.

**Figure 33:** Call boost on the mobile client

A pop-up screen appears if you tap the **Boost** icon and a call grab number is not yet selected.

**Figure 34:** Call boost pop-up

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**Note**
For the call boost to work, only one call can be in progress.
Configuring the call boost settings on the Smart Office Mobile Client

A call boost requires a call grab number, which is configured in the Boost Settings page.

Tap Settings>Boost Settings to access the configuration information.

**Figure 35: Boost Settings**

<table>
<thead>
<tr>
<th>Save</th>
<th>Boost Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Call Boost allows moving an active call to a cellular call. Follow these steps to configure:</td>
</tr>
<tr>
<td></td>
<td>1. Select the nearest service access location:</td>
</tr>
<tr>
<td></td>
<td>Ottawa, Canada: +1 343 8...</td>
</tr>
<tr>
<td></td>
<td>2. Enter your mobile number as the Call Grab Number via the end user web portal under the Service Settings tab. (a desktop browser is recommended)</td>
</tr>
<tr>
<td></td>
<td>3. To move an active call to cellular voice, push the call boost button on the active call screen. The transfer takes a few seconds to complete.</td>
</tr>
</tbody>
</table>

To configure the boost settings,

1. select the nearest service access location.
2. enter your mobile number as the call grab number (tap the end user web portal link).
Sending feedback and logs

You can send feedback and logs to Smart Office Support from your client application.

Sending feedback and logs from the Smart Office Desktop Client

To send logs from the Smart Office Desktop Client, click **Profile>Send Feedback or Logs**.

Enter a description of the issue and select:

- **Generate Log File** to download the log to your desktop
- **Send logs via Email** to open an email addressed to Smart Office Support

Attach the log file to the email and send.

**Note**
You can also send feedback and logs from the login page. Click **Send Feedback or Logs** to open the feedback screen.

**Figure 36:** Sending feedback and logs from the desktop client
Sending feedback and logs from the Smart Office Mobile Client

To send feedback and logs from the Smart Office Mobile Client, on the Profile screen, tap Send Feedback.

Enter your comments in the description field and tap Send logs via Email to open an email addressed to Smart Office Support. The log file automatically attaches to the email.

Note
You can also send feedback and logs from the login page. Tap Please send us your comments and feedback here to open the feedback screen.

Figure 37: Sending feedback and logs from the mobile client