

TalkAnywhere Web Softphone Guide v44.1.2



If you need further assistance, please reach out to us at myaccount.cyberlynk.net. Once we receive your request one of our representatives will get back to you as soon as possible to help you with any of your phone system needs.

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Overview

The purpose of this document is to help walk you through the features and functions of your new TalkAnywhere Web Portal.

We're here to help! If you have any questions about the new functionality please reach out to us at myaccount.cyberlynk.net.

What's New!

Below are highlighted items to help you navigate through some of the updates from V43.4 to V44.

- **PWA (Progressive Web App):** We now offer a native web phone application without the browser.
- **Dial Pad:** Location of the dial pad button has been moved to the toolbar on the left hand side.
- **Pin Cards:** There is now a Pin option on the cards located within the grid to lock the card to the top row of the Grid.
- **Multiple SoftPhone Tabs Open:** If a duplicate web phone tab is opened, the old tab will now display this warning: "TalkAnywhere Web was opened elsewhere". The new tab should take over. The exception is when a call is actively taking place on the old tab. In that case, the old tab will remain active, and the new tab will display a duplicate session warning. Once the new tab is closed, the old tab will auto-refresh and become active. This feature works while using the same browser. It does not work when using an incognito window or different browsers/computers.
- **Minimize the Toolbar:** You can minimize the left hand side toolbar by selecting the hamburger icon. 


Access TalkAnywhere Web

There are two options to access TalkAnywhere Web; Progressive Web App (PWA) or a web browser.

PWA

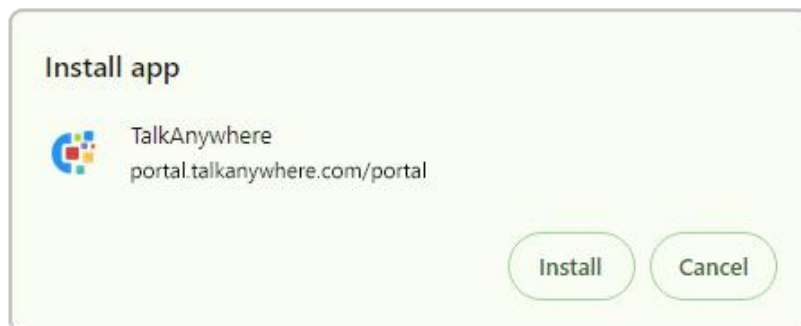
You can access the TalkAnywhere PWA by opening up Google Chrome and going to the URL <https://portal.talkanywhere.net/webphone>.

Once logged in with the credentials that have been provided to you, you will be asked to select your microphone and audio output. You will then be logged into TalkAnywhere Web.

At the end of the URL within the browser you will see the  icon. Select the download icon.



After you have selected the download icon a screen will appear asking if you want to install the App, select Install.



The TalkAnywhere PWA window will then appear and you are all set. You will also see the TalkAnywhere PWA icon appear on your desktop.

To have the TalkAnywhere PWA launch at startup, right click on the desktop icon and select the option Pin to Start.



TalkAnywhere PWA needs to be open in order to receive phone calls through it.

Web Browser

You can access the TalkAnywhere Web application using your supported Chrome browser in one of two ways:

1. Directly: Go to the URL <https://portal.talkanywhere.net/webphone>.
2. Via the User Portal: From the User Portal home page, select Apps in the top-right corner, and then select TalkAnywhere Web from the drop-down list. This will open a new webpage for the application.

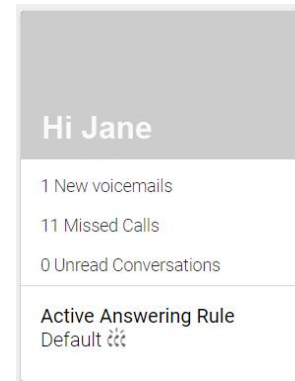
Once logged in you will be asked to allow access to your microphone and allow browser notifications. Select Allow for each of those. You will then be able to use TalkAnywhere Web.

TalkAnywhere Web Grid

Grid is where you can place shortcuts (cards) to sections so that they appear on your dashboard.

Summary Card

You will see a quick summary of your profile within the Summary Card that appears on the dashboard grid.



Pin a card

You can pin a card within the grid so the card will appear in the top row.




Put your cursor in the upper right corner of the card and select the pin icon. 



Answering and Placing a Call

Answer a Call

When a call comes in, a window appears within the softphone client app.

- Select  to answer the call
- Select  to ignore the call. It will continue to ring silently and then go to voicemail
- Select  to reject the call and have it go to voicemail

If the app is minimized on your desktop, you will hear the call when it comes in through your speaker on your desktop.




Answering a second call while on a live call



If you're on a call and a second call comes in, select Answer on the incoming call screen. This will automatically put the first call on hold and allow you to answer the second call. A Swap Calls button will appear on your screen. Select this button to put the current call on hold and return to the original call.



Place a Call

To make phone calls you will need to open up the dial pad.

- Click on the Dial Pad button  or icon  located on the left hand side which will bring up the dial pad
- Dial the phone number
- Select the Send button 

No prefix is required when placing an outbound call

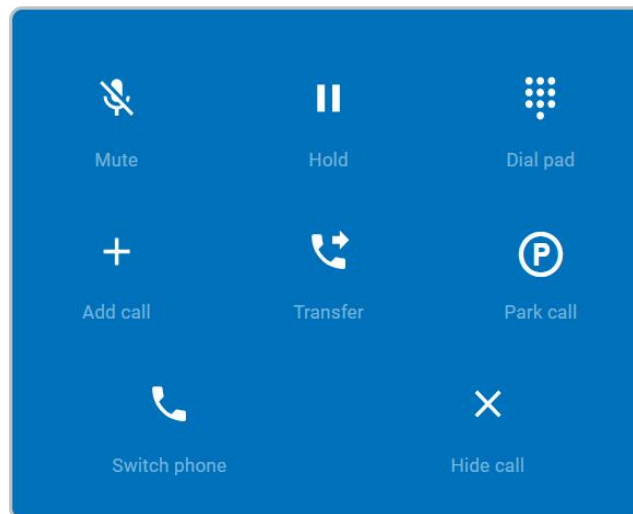
Place an Internal Call

- Select the Contacts icon  on the toolbar on the left.
- Do a search by name, extension or email address in the search field
 - You can also scroll down until you see the name of the person you would like to call.
- Select the name
- You will see their contact information.
- Select the phone icon  next to the name to reach the contact.

Active Call Functions

Once on an active call you will be able to perform several functions:

- Put a call on hold
- Dial an extension
- Conference call
- Transfer a call
- Park a call
- Switch from the softphone to your mobile device



Place a Call on Hold



It is best practice to put a call on hold if you do not need to transfer the call to anyone else. If you need to transfer the call to someone else, follow the steps below for either transferring a call or parking the call.

- While on a call, press the *Hold* icon. The caller will hear music.
- To resume the call select the *Hold* icon again.

Dial Pad





The dial pad function allows you to dial an extension when calling an outside phone number. After you have dialed the phone number and you hear the option to dial an extension or number, select the Dial pad option and dial the number.

Conference Call



Below are the steps to make a conference call. A conference call can include up to 3 phone numbers, including yours.

- When on the live call select the Add Call button. The call will be put on hold and they will hear music
- An option will appear asking if you want to call a contact or dial a new number
- Type in the name/phone number of the person you would like to conference
- Select the phone icon  next to the name to reach the contact

Once that person answers the call you will see a Merge Calls icon  appear, select that icon. The calls are now merged.



Transfer a Call



There are three options for transferring a call:

- Blind Transfer - Transfer a call directly
- Assisted Transfer - Introduce a call before it is transferred.
- Voicemail Transfer - Transfer a call directly to voicemail

Blind Transfer

- When on a call, select the Transfer icon.
- An option will appear asking if you want to transfer to a contact or dial a new number.
- Dial the extension or type in the name of the person you want to transfer the call to.
 - Results will appear. Select the name of the person.
 - From that screen select the phone icon .
- A window will appear asking if this is a Blind Transfer or an Assisted Transfer. Select the Blind Transfer icon. .
- The call is transferred.

Assisted Transfer

- When on a call, select the Transfer icon.
- An option will appear asking if you want to transfer to a contact or dial a new number.
- Dial the extension or type in the name of the person you want to transfer the call to.
 - Results will appear. Select the name of the person.
- A window will appear asking if this is a Blind Transfer or an Assisted Transfer. Select the

Assisted Transfer icon.



- You will be transferred to the contact to introduce the call.
- Once you have introduced the call select the Complete transfer icon
- The call is now transferred.



Voicemail Transfer

- When on a call, select the Transfer icon.
- An option will appear asking if you want to transfer to a contact or dial a new number, select dial a new number.
- Dial 03 and then the extension of the user you are transferring the call to.
- Select the Send button
- A window will appear asking if this is a Blind Transfer or an Assisted Transfer. Select the

Blind Transfer icon.




- The call is transferred.

Park a call



Call Parking is a type of hold. When you park a call, that call can be picked up from ANY phone on the system. If a call is put on hold, only the person who put the call on hold can access that call.

Parking



- When on a live call select the Park Call icon. The active call will hear the on hold music
- You will then be brought to the Park screen
 - Either select Dynamic Parking which will automatically park the call in an open spot
 - or click on the Park icon  next to an open parking spot.
- On the left hand toolbar a blue dot will appear with a number in it next to the Call Park area to confirm the call has been parked.

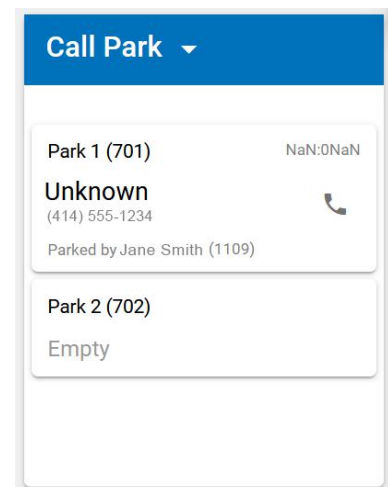
Pick up a Parked call

When you have been notified that there is a call parked for you there are several ways to pick up a parked call.




Grid Option

This will be an option if you have the Call Park card within the grid area

- On your dashboard grid you will see the Call Park card
- Select the phone icon  next to the the call you are picking up
- Your phone will then ring and you can answer the call by selecting the Answer icon 



Call Park Tab

- Select the Call Park icon  on the left toolbar.
- The Call Park screen will appear
- Select the phone icon  next to the call you are picking up
- Your phone will then ring and you can answer the call by selecting the Answer icon 

Switch Phone



If you are taking a call through the Web Softphone and need to continue the conversation away from your computer you can switch the phone call to another device. When on the live call select the Add Call button. The call will be put on hold and they will hear music

- When on a live call select the Switch Phone icon
- A list will appear of all the devices available to switch the call to. Select which one you would like to continue the call on.
- The new device will ring and you can then accept the call to continue the conversation.

Swap Calls



If you're on a call and a second call comes in, select Answer on the incoming call screen. This will automatically put the first call on hold and allow you to answer the second call. A Swap Calls button will then appear on your screen. Select Swap Calls to put the current call on hold and return to the first call.

Toolbar

On the left side of the softphone you will see a set of icons. Below is a description of what each icon does.

Toggle Toolbar

Selecting the menu icon  will expand or condense the left hand side toolbar

Setting a status message

When clicking on the text a window will open. Type in a status message that you would like others to know/see. Others can see this status message through the mobile app. Currently unavailable to be seen on the web portal.

Dial Pad

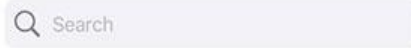
Selecting the Dial Pad button  or icon  will bring up the dial pad window.


Contacts




When you select the Contacts icon you will see all of your team members and any contacts you have created. The contacts you add will only be visible to you.

- Select the Contacts icon
- Either scroll through the list or select the Magnify glass in the corner to do a search
 - Type the name or extension in the search field




- Select the name from the results
- Once on the details screen select the phone icon 

Add a Contact




- When on the Contact screen select the Add contact icon  in the upper corner
- Fill in the details you have for the contact
- Select Save
- The contact has now been added

Favorite Contacts

You can have your favorite contacts appear at the top of the list. In order to make a contact a favorite, select the star icon  next to their name on the contact details screen. It will then appear at the top of your contact list.

Call History



Call history will show you  inbound,  outbound and  missed calls and also call details.

View call history

- Select Call History icon
- You will see all missed, inbound and outbound calls
- Select the contact name or phone number to call them back
- You will be brought to a contact detail screen. From here you can:
 - See when the call was made/received
 - How long the call lasted
 - Call the person back
 - Add as new contact
 - Add phone number to existing contact

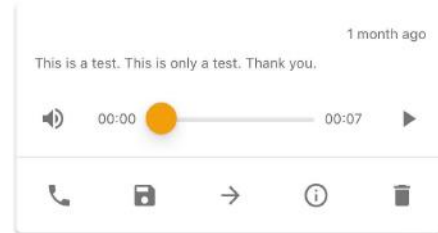
Voicemail



Selecting the Voicemail icon will bring up the voicemail screen. From here you can listen to the voicemail and see a transcription of the voicemail.

Retrieve a voicemail

- Select the voicemail icon
- Click on the voicemail you would like to hear
- Select the play button to hear the voicemail



Voicemail options

- Call
- Save
- Forward
- Trash

Retrieve voicemail from a different device

You can retrieve your voicemail messages from a different device as long as it is registered within the organization.

- Dial 5000
- Enter in the extension
- Enter in the PIN and you will follow the prompts to hear the voicemails.

Chats




Chat allows you to search and chat/share with other users on the same phone system. You can observe current conversations and start new conversations.

Start a chat

- Select the Chat and SMS tab
- Select the New Conversation link
- Within the window that appears, select the contacts you want to chat with
- When done with selecting contacts, click on Done
- Type your message within the window that appears and then hit Enter to send the message.

To have a conversation through the Contacts tab

- Select the contact that you want to start a conversation with
- Select the chat icon 
- A window will appear
- Type your message and then hit Enter to send the message.

Answer a chat

A circle will appear next to the Chat tab that indicates a reply or a chat to a conversation has taken place


- Click on the Chat tab
- Select the message you would like to read
- This will bring up a card on the dashboard
- You can then reply

Chat Options




Selecting the three dots to the right of the contact's name will allow you to

- Add people to the chat
- Turn off notifications from this contact
- Call the contact
- View contact details
- Delete conversation


Call Parks

 Call Park is where you can pick up a call that has been parked. Parking a call allows any phone on the system to be able to pick it up.

Call Park Tab

- Select the Call Park icon  on the toolbar on the left.
- The Call Park screen will appear
- Select the phone icon  next to the call you are picking up
- Your phone will then ring and you can answer the call by selecting the Answer icon 

Add the Call Park card to the dashboard grid

Once on the Call Park screen you can select the Add Call Park button . The card will then appear on the dashboard grid.

Answering Rules



On the Answering Rules screen you will be able to see the rules that have been established through the User Portal.

Disable an Answering Rule

You can disable a rule by selecting the rule and then clicking on the three dots. Select Disable. The rule is now disabled.


Enable an Answering Rule

You can enable a rule by selecting the rule and then click on the three dots. Select Enable. The rule is now active.

Greetings



You can view the current greeting messages and record new greetings from this area.

To add a greeting select the Add icon . Enter in a name and tap on the microphone icon to record the greeting.

To delete a greeting, select the greeting and then choose Delete.

Settings



From the Settings section you will be able to assign ringtones along with assigning which phone device to place and receive calls from.

- Call From - Assign the device to place and receive phone calls.
- Microphone
- Ringtone - Assign the ringtone
- Call Waiting Tone
- Version information



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