

Softalk™ Office User's Manual



*(Firmware version 1.5 and later)
Revision 1.5*

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Introduction

What is Packet8 Softalk Office?

Packet8 Softalk Office is a software telephone (also known as a “softphone”) option for Virtual Office and Virtual Attendant with all of the features of a Virtual Office Extension, including call features such as Call Hold, Call Transfer and Three-Way Calling. As well as call control features such as Auto-Attendant, Conference Bridge, Voicemail, Do Not Disturb (DND) and Call Forwarding. Also add video calling with Packet8 Softalk Office.

The list of features included with Packet8 Softalk Office include:

- Simple installation with the audio and video tuning wizard
- Extension Dialin
- Access Auto Attendant
- Conference Bridge
- Music on Hold
- Three-Way Conference
- Transfer
- Call Transfer
- Call Ignore
- Business-Class Voicemail with Voicemail to Email Notification, and one number Follow Me.
- Message Waiting Indicator
- Caller ID
- Call Waiting Caller ID
- Call Record
- Touch Tones
- Call Forwarding
- Three-Way Calling Audio and Video Conferencing
- Speakerphone

- Call Timer
- Mute
- Direct IP Calling
- Speed Dial
- Send to Voicemail
- Redial
- 2 lines

How does Packet8 Softalk Office Work?

Instead of making phone calls over traditional telephone networks with standard phones, Packet8 Softalk Office calls are made over the Internet on the softphone running on a PC. Softalk Office is an extension that is connected to a Virtual Office environment that includes an array of features for business communication.

Installation

Minimum System Requirements

	Audio Only		All Features	
	Minimum	Optimal	Minimum	Optimal
Processor	Intel® Pentium II 400 MHz or equivalent	Pentium III® 1.3 GHz or equivalent	Intel Pentium III 700 MHz or equivalent	Pentium 4® 2.0 GHz or equivalent
Memory	128 MB RAM	128 MB RAM	256 MB RAM	256 MB RAM
Hard Disk Space	15 MB	30 MB	30 MB	30 MB
Operating System	Windows® 2000 Windows® XP		Windows 2000 Windows XP	
Connection	IP network connection (Dial up, broadband, LAN, and wireless)			
Sound Card	Full duplex, 16 bit			

Multi-media Device Requirements

Since Packet8 Softalk Office is a software application, speakers and a microphone are required to make calls. Any of the following configurations are acceptable:

- External speakers and microphone
- Dual-jack multimedia headset
- Built-in microphone and speakers
- USB multimedia headset
- USB phone

Calls made with Packet8 Softalk Office will work without a video camera, but one is necessary to allow other callers to see the caller's image. Packet8 Softalk Office will work with most USB video cameras.

Installing Packet8 Softalk Office

Installing Packet8 Softalk Office is straightforward:

1. Order your service account for Softalk Office, configure the PBX, configure your Softalk Office extension, then create your Softalk Office user profile.
2. You will be sent an email with the downloading instructions and your user profile details.
3. Click on link provided in the email.

Windows installation instructions:

1. Close all software applications that use sound such as CD and media players.
2. Install Softalk Office -Win32-[build number].exe (or the similar indicated file name). NOTE THAT THE INSTALLATION WIZARD WILL PROMPT YOU TO SHUT DOWN ANY VERSIONS OF PACKET8 Softalk Office ALREADY RUNNING.
3. Follow the prompts offered by the installation wizard. NOTE THAT YOU MUST ACCEPT THE LICENSE AGREEMENT TERMS TO INSTALL PACKET8 Softalk Office FOR WINDOWS.
4. Select Launch *Packet8 Softalk Office* at the final step of the wizard to start using the softphone.
5. Click *Finish* to complete the installation.

Uninstalling Packet8 Softalk Office

To uninstall an existing version of Packet8Softalk Office, follow the steps given below:

1. Launch the Windows Control Panel.
2. Select *Add or Remove Programs*.
3. Select the appropriate version of Packet8 Softalk Office and click *Change/Remove* (or *Add/Remove*).

Starting Packet8 Softalk Office

You can start Packet8 Softalk Office for Windows by following the steps given below:

1. Click the *Start* button.
2. Select *Programs* (*All Programs* on some systems).
3. Select the Packet8 Softalk Office folder (or the folder specified upon install).
4. Click the Packet8 Softalk Office icon.
5. Insert your Softalk Office user name.
6. Insert Softalk Office extension password. Password is #.

NOTE You can also launch Packet8 Softalk Office by double-clicking on the appropriate desktop shortcut icon.

Using Packet8 Softtalk Office

The Keypad

The Packet8 Softtalk Office softphone has an easy-to-use key pad as the main user interface, allowing for quick access to basic and advanced calling features.

See Figure 1 below for an illustration of the Packet8 Softtalk Office user interface.



Figure 1: Packet8 Softtalk Office User Interface

Before Making a Call

Things to Keep in Mind

Making calls with Packet8 Softtalk Office is simple; there are, however, some differences between a softphone and a traditional telephone:

1. A softphone is a computer application that must be running to make or receive calls.
2. Softphone software must login to the network before making or receiving calls. This procedure may take a few seconds as the softphone contacts Packet8's network. Once the softphone's call status reads, Logged in – Enter Phone Number the user is ready to make or receive calls.
3. Since calls are transmitted over the Internet, service quality may drop due to network congestion. Although Packet8 Softtalk Office includes advanced signal processing features to mask the effect of such congestion, decreased voice quality may be noticeable during poor network conditions. Most broadband connections provide adequate bandwidth for high-quality voice and video. If you experience poor audio or video quality. See [“Packet8 Softtalk Office Troubleshooting”](#) in [Appendix A](#).

Logging In

The log in dialog box will show up and request:

1. Softtalk Office Username.
2. Softtalk Office Password.



Figure 2: Log In Dialog Box

Your Softtalk Office username and password can be found in the confirmation/ configuration email that was sent to you.

NOTE: Your default Softtalk Office password will be the same as the password to your voicemail. For security reasons, we highly recommend you change your password after you have logged in for the first time.

When finished entering all of the information, click *Log In*. If all required information is saved, Softtalk Office will attempt to login to the Packet8's network, indicated by a Logging in... message in the call status screen.

IMPORTANT When the message *Ready - Your Virtual Office account: 1-XXX-XXX-XXXX* appears in the call status screen, then Packet8 Softtalk Office is ready to make and receive calls. If you see the message *Login failed!*, the login was not successful and you will not be able to make or receive calls. For such cases refer to Appendix A: Packet8 Softtalk Office Troubleshooting, which includes tips for this and other potential softphone problems.

Placing a Call

As mentioned in the previous section, Packet8 Softtalk Office is ready to make or receive calls once you see the message *Ready - Your Virtual Office account: 1-XXX-XXX-XXXX* in the call status screen.

There are several ways to enter a phone number in Packet8 Softtalk Office. You can click the digits of Packet8 Softtalk's Office on screen numeric keypad, or you can enter the numbers/ letters directly from your computer's alphanumeric keyboard.

Notice that when you begin to enter a number, Line 1 is automatically selected as the line in use for that call—as shown in Figure 3 below.

If at any point you enter erroneous digits, click the *Clear* button within the dial pad or press *Backspace* on the computer keyboard to make corrections.

When you enter a phone number, you will receive prompts for completing that number (as shown in Figure 3). To enter the rest of the number as suggested, hit the *Tab* key on the computer keyboard to enter the remaining digits.



Figure 3: Dialing a Number

NOTE: Remember it is required to enter 9 before dialing a public telephone number from a Virtual Office extension. Dialing another extension is as simple as entering the 3 or 4 extension number.

When you are finished entering a number, click the green telephone icon button on screen or press *Enter* on the computer keyboard to dial.

As with a traditional telephone, you will hear ringing as Packet8 Softtalk Office places the call. At this time, you also will also see the message "Ringing" in the call status screen. When the caller answers, you should hear him/her and see the message "Call Established" in the call status screen.

Quick Dial Function

There are 3 quick dial features for access to the Auto-Attendant(AA), Voicemail(VM) and Conference Bridge(CB). Pressing these buttons from an idle or connected call will automatically dial these important extensions.

You can also place a call by clicking on an available on screen line button and dialing the appropriate number. Conference calling is covered in "[Call Conferencing](#)" of this document.

How	Description
Keying	<ol style="list-style-type: none"> 1. If you start to enter a name and the Turn Letters feature is on, then these letters are converted to numbers. Press Clear, then spacebar and try again. See "Options - General - Application" on page 13 for details on the Turn Letters feature. 2. Click or press <i>Enter</i>.
Partial keying	As you key in an entry, a suggestion for completing the entry may appear. Press Tab to accept the suggestion. Then click or press <i>Enter</i> .
Drag-and-drop	<p>Drag an entry from the Contacts tab or any of the lists in the Calls tab to the Call display.</p> <p>If the Contacts list contains lots of contacts, use the  field to filter the list. Then drag the entry.</p>
Right clicking	<p>Right click an entry on the Contacts tab or any of the lists in the Calls tab, and choose Phone this Person.</p> <p>If the Contacts list contains lots of contacts, use the  field to filter the list. Then right click the entry.</p>

Redialing	Press <i>Redial</i> .
From Outlook	<p>If you have set up contacts in Microsoft® Outlook®, you can use that list of contacts to place a call.</p> <ul style="list-style-type: none"> ■ Double-click the contact in the Contacts list in Outlook. The Contact dialog box will appear. ■ Click the in the top left corner and select the phone number to dial. As soon as you select the number, Softalk Office will be brought to the front (or will be started) and the call will be placed. <p>For information on how Softalk Office and Outlook contacts work together, see “Exporting Contacts” in Chapter 5</p>



Figure 4: Call Alert box

If you have turned on Call Alerts, the Call Alert box appears at the bottom of the screen. For information on turning on alerts, see [“Options - General - Alerts and Sounds”](#) on page 14.

You will hear a ringing tone while Softalk Office attempts to make a connection.

Encryption

The outgoing call may be encrypted, depending on your security settings. For information on current security settings, see [“Encryption”](#) on page 9.

- If an encrypted call is established, the  icon appears on the Call Display. This icon indicates that the call is guaranteed to be secure between you and your proxy, and may or may not be secure beyond that first hop. See [“Encryption”](#) on page 9 for more details on how encryption works.
- If an unencrypted call is established, the unencrypted icon  appears.
- If the call cannot be established with the specified security, the call will fail.

Ending a Call

As with traditional phones, softphone calls are brought to a close when either the Packet8 Softtalker or the other caller hangs up.

You can end an active call by clicking the on screen  *Hangup* button. When a call has ended the message *Hung up* will appear in the call status screen.

After a call has ended, details of the call (such as the length of the call and the caller ID) will remain in the call display. To clear the display, click the *Clear* button.

Redial

To redial a number, click the *Redial* button within the on screen dial pad.

Answering a Call

Packet8 Softtalk Office must be enabled to answer incoming calls. When you receive a new call, a ring tone will sound over the computer's configured speaker device. You will hear the softphone ringing over that device (e.g. headset/USB phone).

If the Softtalk Office is hidden behind another window or minimized, the application will pop into view when the incoming call is received.

Incoming calls are indicated in the call display as shown in Figure 4 below.

Incoming calls arrive on Line 1 by default. They are indicated by a flashing light on the line button.

You can choose to ignore calls by clicking the *Ignore* button found within the call status screen below the caller ID of the incoming call.



Figure 5: Incoming Call

As a call arrives, click the  *Dial* button (or press *Enter* on the computer keyboard) to answer. You can also click the appropriate flashing line button to answer the incoming call.

Placing a Call on Hold

While engaged on a call, you can place that call on hold by either clicking the corresponding line button or by selecting another line. The on hold line's button will flash to indicate that the corresponding call has been placed on hold. To resume a call that is on hold, select the line again by clicking on the appropriate line button "1" or "2."

Dial Pad Controls

The keypad includes several controls which allow you to customize your Packet8 Softalk Office experience:

Microphone and Speaker Adjustment

The Packet8 Softalk Office keypad includes microphone and speaker sliders as shown in Figure 1. Click and drag on the slider up or down to increase or decrease the desired volume level.

You may also mute the Softalk Office phone so that the other caller cannot hear you. Click the *MUTE* button at the bottom-left of the keypad to mute the phone. Toggle the button once more to take the phone off mute.

Softalk Office Menu

Packet8 Softalk Office includes a Softalk Office menu that allows you to quickly access the following features:

- **Settings** - Settings control the way that you work with Softalk Office. See "[Options - General - Application](#)" on page 13.
- **Open Diagnostic Log** - Customer support may ask you to pen this log if you are experiencing problems with Softalk Office. For information, see "[Options - Advanced - Diagnostics](#)" on page 19.
- **Open Diagnostic Folder** - Customer support may ask you to pen this log if you are experiencing problems with Softalk Office. For information, see "[Options - Advanced - Diagnostics](#)" on page 19.
- **Privacy Management** - See "[The Privacy Management Window](#)" on page 23.
- **Log In** - This is where you login to your new Softalk Office or existing account.

- **Help**- This menu item takes you to <http://www.packet8.net/support/faqs/>.
- **About** - Shows the version of Softtalk Office
- **Exit**- To exit Softtalk Office.

Launch the dial pad Softtalk Office menu by clicking  at the top of the Softtalk Office phone or right click anywhere over the on screen dial pad, [see Figure "6"](#).



Figure 6: Menu

The Diagnostic Log contains important network and protocol information that may be useful for troubleshooting. For more on this see ["Packet8 Softtalk Office Troubleshooting"](#) in [Appendix A](#).

Options

Options are settings and preferences that apply to all accounts.

Options - General - Application.

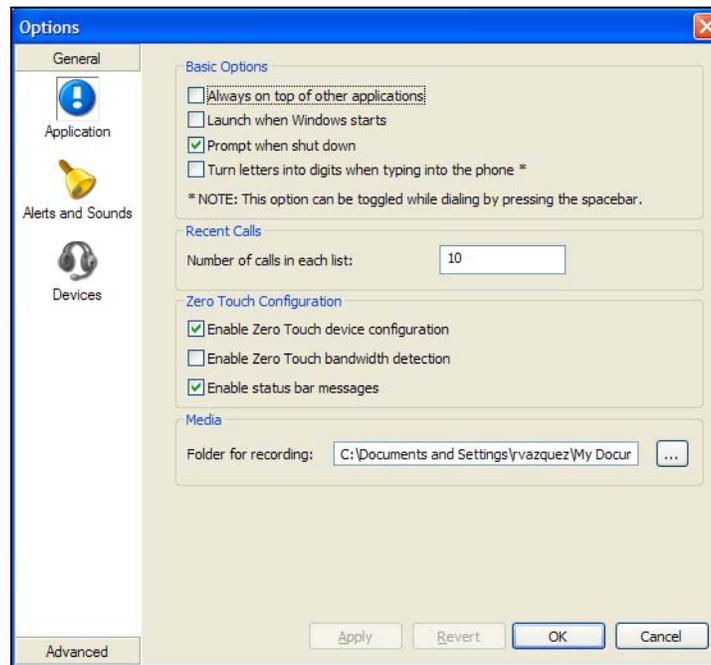


Figure 7: General - Application

Options - General - Application

Field	Description
Always on top of other applications	Click on or off, to suit your preference.
Launch when Windows starts	Click on or off, to suit your preference.
Prompt when shutdown	Click on or off, to suit your preference.
Turn letters into digits when typing into the phone	Click on or off, to suit your preference. You can also turn this feature on and off at any time by pressing the spacebar.
Number of calls in each list	Enter number based on your preference.

Enable Zero Touch device configuration	<p>When clicked on, Softalk Office detects the audio and video devices connected to your computer and automatically configures one of them for use with Softalk Office.</p> <p>Typically, leave this setting on. If you have several audio or video devices and you do not like the device that Softalk Office selects, you can override the selection on the Devices pane. See page 25.</p>
Enable Zero Touch bandwidth detection	<p>When clicked on, Softalk Office detects the speed of your network connection and hence the potential bandwidth. If you move your computer to a different IP address, Softalk Office automatically detects the new speed.</p> <p>When clicked off, you must specify the network connection . See " Options - General - Device" on page 25.</p> <p>The recommended setting is On.</p>
Enable status bar messages	<p>When clicked on, messages relating to zero touch configuration will appear in a notification balloon at the lower right corner of the screen, whenever the configuration automatically changes.</p> <p>(Notification balloons are supported in newer versions of Windows.)</p>
Folder for recording	<p>Specify a location for saving files when you record your conversations.</p>

Options - General - Alerts and Sounds

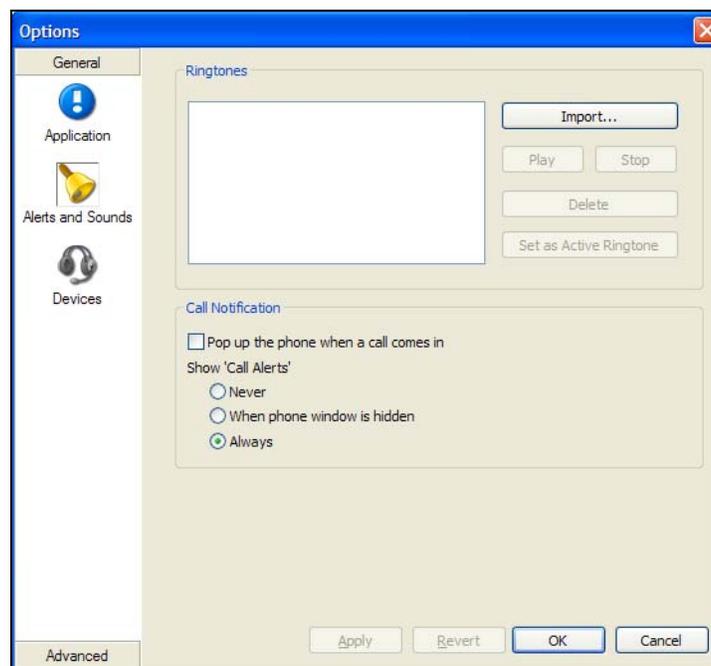


Figure 8: Options - General Alerts and Sounds

On this page you can:

- Work with Ringtones - you can import a Ringtone (a .WAV file). You can play to try it out. You can activate one Ringtone. You can delete a Ringtone.
- Set up Softtalk Office to bring the softphone to the front automatically when a call comes in.
- Set up Softtalk Office to display the Call Alert box (below) when a call comes in either always, or only when Softtalk Office is not visible.



Figure 9: Call Alert box

Options - General - Device

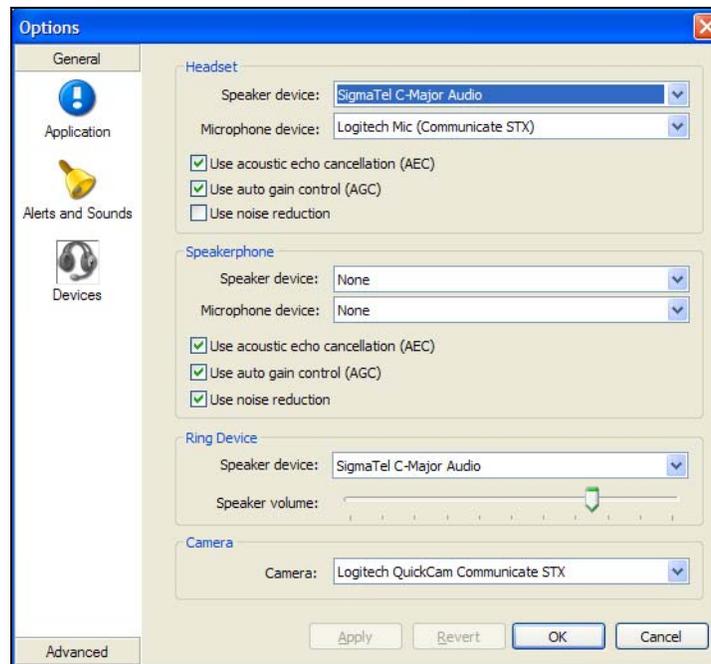


Figure 10: Device Menu

Field	Description
Headset	
Speaker device	Change these fields only if you want to override the device selected by zero-touch device configuration.
Microphone device	<p>In both these fields, select the headset you are using.</p> <p>The headset is the device usually used for audio out (the sound you hear) and audio in (recording your voice). The only situation in which the headset is not used is when the speakerphone button on the dialpad is pressed.</p> <p>Therefore, unless you will always be using Softtalk Office in speakerphone mode, you must make a selection.</p> <p>Select the headset in both the Speaker device field and Microphone device field.</p>
Use Acoustic Echo Cancellation (AEC)	<p>Reduces the echo effect that can arise with a speakerphone or that can arise if the sound from the speakerphone or headphone leaks into the microphone. Turning this feature on improves sound quality.</p> <p>This setting is typically on.</p>
Use Auto Gain Control (AGC)	<p>Automatically adjusts the microphone volume level so that the other party does not hear the distortion that might be caused by too high a microphone input or too low volume (due to too low input level).</p> <p>This setting is typically on.</p>
Use noise reduction	<p>Automatically attempts to remove background noise.</p> <p>This setting is typically off for the headset.</p>
Speakerphone	
Speaker device	<p>Change this field only if you want to override the device selected by zero-touch device configuration (see page 24).</p> <p>Make the appropriate choice:</p> <ul style="list-style-type: none"> ■ Select the device that you want to use for audio out (the sound you hear) when the speakerphone button is pressed. Make sure you select a speaker device (not the headset). ■ Select None if you do not have a speakerphone. The speakerphone button on the dialpad is disabled.

Microphone device	<p>Change this field only if you want to override the device selected by zero-touch device configuration.</p> <p>Make the appropriate choice:</p> <ul style="list-style-type: none"> ■ Select the device that you want to use for audio in (recording your voice) when the speakerphone button is pressed. <p>It can be any microphone: it does not have to be the microphone on the device you specified as the speaker device. For example, it can be the microphone on your camera.</p> <ul style="list-style-type: none"> ■ Select None if you do not have a speakerphone. The speakerphone button on the dialpad is disabled.
Use Acoustic Echo Cancellation (AEC)	<p>Reduces the echo effect that can arise with a speakerphone or that can arise if the sound from the speakerphone or headphone leaks into the microphone. Turning this feature on may use more processing power, which may slow down your applications.</p> <p>This setting is typically on.</p>
Use Auto Gain Control (AGC)	<p>Automatically adjusts the microphone volume level so that the other party does not hear the distortion that might be caused by too high a microphone input or too low volume (due to too low input level).</p> <p>This setting is typically on.</p>
Use noise reduction	<p>Automatically attempts to remove background noise.</p> <p>Typically on for the speakerphone.</p>
Ring Device	
Speaker device	The device where you want to hear the phone ringing - the headset, the speakerphone, or none.
Speaker volume	The volume of the ringer.
Camera	
Camera	<p>This field appears only on the version of Softtalk Office that include video functionality.</p> <p>Complete this field only if you have disabled zero-touch device configuration.</p> <p>Select the camera model.</p>

Options - Advanced - Network

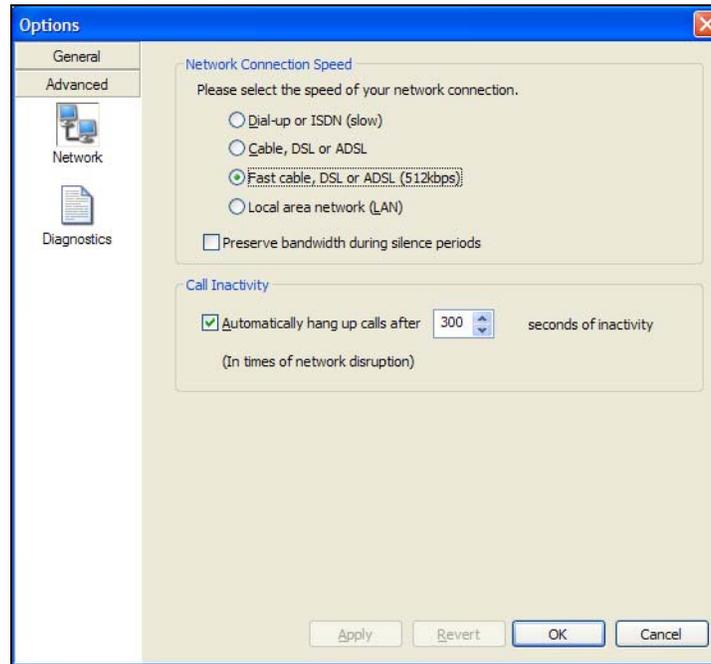


Figure 11: Advanced - Network Menu

Field	Description
Network connection speed	Complete this field only if you have disabled zero-touch bandwidth detection. Select the type of network connection for your computer.
Preserve bandwidth	When this feature is on, Softalk Office stops sending audio when you are not talking. When this feature is off, Softalk Office always sends audio, which uses more bandwidth but may result in better call quality. Typically off. However, if you are using a slow (dial-up or ISDN) connection, you may want to turn it on.
Call inactivity	When this feature is on, Softalk Office automatically hangs up a call when it detects the specified period of inactivity. In other words, if you are on a call and the call gets disconnected (the call session ends) because of network problems (rather than because of one of the parties hanging up), then Softalk Office ends the call after the specified period. This setting is typically on.

Options - Advanced - Diagnostics

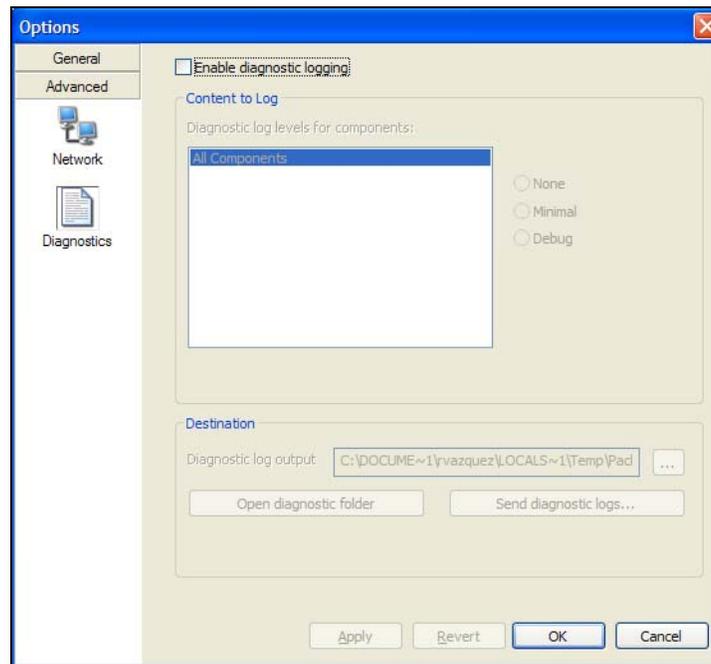


Figure 12: Advanced - Diagnostics Menu

This screen lets you enable logging to files. Logging uses computer resources, so you should only enable it when instructed by a customer support representative.

To set up logging:

1. Click *Enable logging*.
2. Set the logging level.
3. Specify the folder where logs will be saved.
4. Click *Apply*.

Activity on Softtalk Office will be logged to .csv files in the specified folder. A new set of files is started each time you log on. In order not to create large files when logging (which may create computer problems), you must not remain logged on indefinitely when logging. You should occasionally exit and restart Packet8 Softtalk Office.

If requested by a customer support representative, you can:

- Open the logging folder and then open a log file using a text editor.
- E-mail the logs in the specified folder to customer support: Click Send logs to customer support. A dialog box appears showing all the logs. Select files and click Open; the selected files are sent and the dialog box closes.

You can delete log files from the specified folder as you would delete any file on your computer.

Account Settings

Accounts

To work with accounts, click  at the top of the phone and choose Account Settings. The Account window appears, showing your account setup.

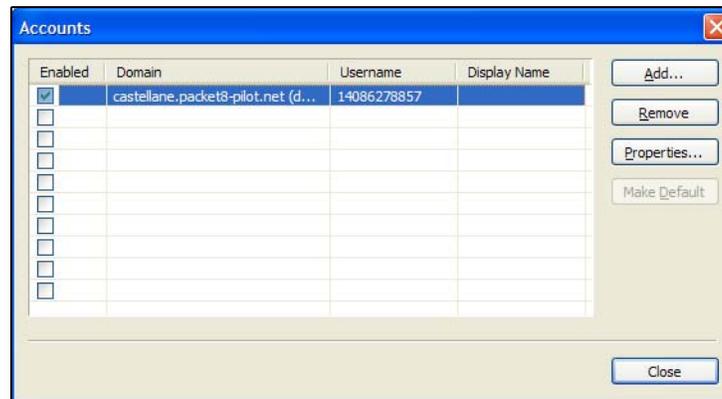


Figure 13: Account Settings Window

You can:

- Resize the columns.
- Remove an account.
- Enable your account. See below for details.
- Set or change the properties of an account. Click the *Properties* button, then see the following pages for details.

NOTE: You must enable an account in order to make and receive calls. Click the *Enable* box beside each account.

- You can never place a call on a disabled account (even if you enter a prefix). If you place a call that is only "known" to the service provider of a disabled account, it will fail with a "Not found" message.

You can never receive a call on a disabled account. If another party phones you on a number that is only known to a disabled account, the call will never appear on your phone.

Account Properties - Security



Figure 14: Account Settings - Security Window

You can set up Softalk Office for the type of security (encryption) you want for incoming and outgoing calls.

Softalk Office supports:

- Signaling encryption using TLS.
- Media encryption using SRTP.

Setting Up Security Outside of Softalk Office

When using TLS, you must have the root certificate that signs the proxy's chain of certificates. In most cases, the root certification will already be installed. Procedures for the exchange of certificates are outside the scope of this documentation. The certificates must be stored on the Softalk Office computer, in the root certificate store.

Setting up the root certificate on your computer ensures that the connection to the proxy is TLS secure (the first hop). Any proxy in the chain (between you and the caller) that does not support TLS may cause an insecure link in the chain. Therefore, if the other party is outside your domain, you cannot be completely sure that the call is secured at the signaling level, which means that you cannot be sure that it is secured at the media level.

When a call with both signaling and media encryption is established, Softalk Office displays the encryption icon (). This icon indicates that the call is secure between each caller and their proxy (first and last hop) and that it may or may not be secure for other hops.

When a call with no encryption or with only signaling encryption is established, Softalk Office displays the unencrypted icon ().

Setting Up for Security for Softalk Office

The options for media encryption are described in the following table.

Account Properties - Security

Option	How Outgoing Calls are Handled	How Incoming Calls Are Handled
Make and accept only encrypted calls	Softalk Office will place all calls with TLS. The call INVITE will specify SRTP media encryption. If the correct certificates are not in place or if the other party does not accept encrypted calls, the call will fail.	Softalk Office will only accept INVITEs that are for encrypted calls. If Softalk Office receives a call INVITE that is not encrypted, the call will be rejected and will be placed in the Blocked list in the Calls & Contacts drawer.
Prefer to make and accept encrypted calls	Softalk Office will place all calls with TLS. The call INVITE will specify SRTP media encryption. If the correct certificates are not in place or if the other party does not accept encrypted calls, the call will fail. Softalk Office will then place the call without encryption.	Softalk Office will accept INVITEs for both encrypted and unencrypted calls.
Make unencrypted calls, accept all calls	Softalk Office will place only unencrypted calls. If the other party does not accept unencrypted calls, the call will fail.	Softalk Office will accept INVITEs for both encrypted and unencrypted calls.
Do not allow encrypted call	Softalk Office will place only unencrypted calls. If the other party does not accept unencrypted calls, the call will fail.	Softalk Office will only accept INVITEs that are for unencrypted calls. If Softalk Office receives a call INVITE that is encrypted, the call will be rejected and will be placed in the Blocked list in the Calls & Contacts drawer.

Setting up for Security within Softalk Office

The options for media encryption are described in the following table.

Deleting an Entry

Click on the entry and click Delete. The entry is immediately deleted.

You can also ban a person in the Received, Dialed or Blocked list. Right-click on the name and choose Ban this Person.

The About Window

Right-click the main Packet8 Softtalk Office graphic and from the drop down menu, choose About. This will show what version of Packet8 Softtalk Office is running.

Window Controls

At the top of the Softtalk Office keypad are the Help, Hide in System Tray, and Exit buttons (see Figure 1). Depending on the version running, the behavior of these buttons may vary as described below:

Controls within Packet8 Softtalk Office for Windows

As expected, the Hide in System Tray button will send the application to the Windows system tray. You will still be able to receive calls when the softphone is minimized. The Exit button will shut down the application. You will not be able to receive calls after closing the application and calls will be routed to your Voicemail if you enabled Voicemail.

Advanced Calling Features

Along with basic calling functionality, Packet8 Softalk Office also includes many advanced features found with traditional business phones. These premium features are covered in the following subsections:

Call Conferencing

Packet8 Softalk Office allows you to establish a Conference Call that will allow multiple callers to converse at once. Each individual on the Conference Call can hear and speak to every other participant.

Starting a Conference Call

You may host a conference by calling the other callers involved, or by allowing them to arrange the call themselves. For example, you can create a simple Three-Way Call by following the steps below:

1. With an active call, place it on hold by either:
 - a. selecting another line and dialing a third caller, or
 - b. accepting an incoming call from a third caller by clicking the line on which the call arrives.

NOTE: Either operation places the original caller on hold.

2. After informing the new participant about the Three-Way Call, click the **CONF** button (see “The Keypad”) to include all callers in the conversation.
3. To end a Three-Way Call, click the **CONF** button again to place both callers on hold. At this point no participants can speak to one another.
4. You can then talk to each caller individually by selecting the appropriate line.

NOTE: The conference operation above can be done for any two lines. For example:

Two parties on two lines, **CONF** joins all three.

One line connected, connect line 2 and press **CONF** to join all parties.

Removing a Caller from the Conference

To remove a caller from an existing conference call, complete the following steps:

1. Place the conference on hold by clicking the *CONF* button.
2. Select the line of the participant who wishes to leave the conference.
3. Say good bye to the participant then click the *Hangup* button.
4. Click the *CONF* button once more to re-establish the conference.

NOTE: A caller may leave the conference on their own by hanging up. Their line will then appear as inactive and the rest of the conference will be unaffected.

Transferring Calls XFER

Both supervised and blind transfer is supported with Softtalk Office-
While on either line 1 or 2 and a transfer is desired.

1. For supervised press the other line, call the party state reason for calling and then press *XFER*.
2. For blind transfer while on either line 1 or 2 press *XFER* dial the number and the call will be transferred

Adding a Caller to the Conference from the Contact Drawer

You can also add a person from your Contact list to a conference call by right-clicking their name in the Contact drawer and selecting *Conference in [caller's name]*.

Do Not Disturb

Packet8 Softtalk Office allows you to use Do Not Disturb mode. When Softtalk Office is set to this mode, all incoming calls will be sent to voicemail or be given a “busy” indication. Do Not Disturb is toggled on/off by clicking the on screen *DND* button.

Auto-Answer

Packet8 Softtalk Office allows you to employ an Auto-Answer mode. When the Softtalk Office is set to this mode, it answers calls automatically after pre-determined time that can be adjusted in the Settings menu. Auto-Answer is toggled on and off by clicking the on screen *AA* button.

Flash

The *Flash* button on Packet8 Softtalk Office works the same way as flash on a traditional telephone. Clicking the hang-up button quickly on a traditional telephone performs the same task. Such actions are used sometimes to transfer calls or initiate Three-Way Calling.

To flash, click the *Flash* button within the on screen dial pad.

- If the user is in an active call, clicking *Flash* will provide a new line.
- If the user clicks *Flash* while receiving a call, the softphone will “pick up.”
- If a line is on hold, clicking *Flash* will allow the Softalker to speak with that person.

Speakerphone

Packet8 Softalk Office can work as a speakerphone as well. If a user normally speaks with a headset, they will require a second sound device—such as sound card or USB device—to use Packet8 Softalk Office as a speakerphone.

To activate the speakerphone, click the *Speakerphone* button in the lower right corner of the graphic. To de-activate the speakerphone, click *Speakerphone* again.

Call Record

Packet8 Softalk Office can record calls. Perform the following steps to set the folder in which recorded calls are to be stored:

- Open the Settings dialog.
- Choose the Media branch.
- Under Folder for Media Files, click the Choose Directory button.
- Choose the desired directory and click OK.

To record a call, click the *REC* button at any time during the call. Click the button again to stop recording. Recordings will be saved as AVI files.

Voicemail

Packet8 Softalk Office has a Voicemail box. If you have a voicemail message, you will see an envelope display on the screen of softphone. To check your voice messages, click on the envelope icon (show the envelope icon) on the screen. When prompted, enter your password. Refer to your Packet8 Features Guide for more information.

The Wings & Settings Menu

As with similar features on cell phones, Packet8 Softtalk Office allows you to store a list of contacts in a virtual phone book. Softtalk Office also includes a settings dialog that provides access to a variety of relevant settings.

The Contact Wing

To open the Packet8 Softtalk Office Contact wing, click the black button toward the extreme right edge of the graphic display Figure 17:



Figure 17: Contact Wing Open

Using Contacts

Call a contact	To use the person's primary number, double-click or drag the contact to the Call Display. To choose the number to use, right-click and choose Call, then click the desired number.
E-mail a contact who has an e-mail address	Right-click and choose Send E-mail.

Managing Contacts

Adding, Deleting or Renaming Groups

Click the Contacts menu and choose *Manage Groups*. The Manage Groups dialog box appears.

- To create a new group, click *New Group*, type a name, and press Enter.
- To rename, click on the group so that only the text is selected. Type the new text and press Enter.
- To delete a group, select the group and choose *Delete Group*. The group is deleted. The contacts in that group are moved to No Group.

Adding a Contact

The screenshot shows the 'Contact Properties' dialog box with the 'General' tab selected. The 'Name' section includes 'First' and 'Last' input fields, a 'Display as' field, and a 'Group(s)' dropdown menu with a 'Select More...' button. The 'Contact Information' section is a table with the following structure:

Type	Phone / Address	Primary
Business		<input type="radio"/>
E-mail		<input type="radio"/>
Fax		<input type="radio"/>
Home		<input type="radio"/>
Mobile		<input type="radio"/>
Softalk		<input type="radio"/>

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Figure 18: Contact Menu - Add Contact

Click the Contacts menu and choose *Add Contact*. The Contact Properties dialog box appears, see below.

Finding a Contact

If the contacts list is long, use the  field to filter the contacts that are displayed. To clear the filter and redisplay all contacts, clear the  field.

Changing Contact Information

To change the information for a contact, right-click the contact and choose Edit. The Contact Properties dialog box appears, see below. Some of the changes you can make are:

- Change any contact details.
- Add, delete or change a contact method.
- Change the primary contact method.
- Move a contact to another group by selecting a different group.
- Add an existing contact to more groups by selecting one or more extra groups.

Moving or Deleting a Contact

- To drag a contact to a different group, select it and drag it to the new group name.
- To delete a contact, right-click the contact and choose *Delete*. The contact is removed from this group.

Contact Properties Dialog Box

1. Enter the desired information.
2. When you click OK, the contact is added to the specified group or groups, with the specified primary contact method displayed in the list.

Contact Properties Dialog Box

Field	Description
Name	Complete as desired.
Display as	Required. This is the name that will appear in the Call Display and the Call Alert when this person phones you.
Group(s)	Either: <ul style="list-style-type: none"> ■ Choose one group. ■ Click Select More and select several groups. The new contact will be added to each group. ■ Create a new group by clearing the field and typing in a new name. The new contact will be added to this new group. ■ Clear the displayed group in order to add the contact to No Group.
Contact Information	Enter contact information. If necessary, change the primary Contact Information.

Importing Contacts

You can import a contacts list from:

- A comma-separated file. Use this method to import from a Microsoft Excel file. You will first have to set up the file; see below.
- A Microsoft Outlook or Microsoft Exchange contacts list (a *.pst file).
- A vCard file (*.vcf file). A vCard is an electronic business card that is often attached to an email.

The new contacts will be added to the existing contacts.

1. Click the Contacts menu and choose Import. The Import Contacts wizard starts.
2. As soon as you click Finish on the wizard, the Contacts tab in Softalk Office is updated to show the imported entries. Note that none of the entries are set up with availability turned on; in order to view availability of contacts, you must modify the appropriate entries by changing the Show this contact's Availability checkbox. See above for details.

Setting up an Excel File for Import

1. Remove any introductory text or headings from the top of the file. (You can keep text at the end of the file; it will be ignored during the import.)
2. Insert a blank row as the first row, then insert the headings that Softalk Office will use to interpret the meaning of each column. The columns can be in any order. The most popular headings are:
 - display-name
 - entry_id
 - given_name
 - surname
 - postal_address.

For a complete list of headings, see "Error! Reference source not found." on page Error! Bookmark not defined.

3. Save the file as *.csv.

Exporting Contacts

You can export a contacts list to a comma-separated file, a pst file or a vcf file.

1. Click the Contacts menu and choose Export. The Export Contacts wizard starts.
2. When you click Next, the export starts. The result is:
 - For an Outlook export, the existing .pst file is updated to include the entries from the Softalk Office contacts list. If Outlook is open, the entries immediately appear in the Contacts list. All information in the Softalk Office contacts list is exported to Microsoft Outlook. Only information that can be displayed in Outlook actually

appears in the Outlook Contacts window. Typically this means that all SIP addresses are exported (and stored in custom fields) but not displayed in Outlook.

- For other formats, a new file of the specified type is created.

Calls Tab



Figure 19: Calls Tab - Detached

There are three lists that show calls you have made and received:

- Missed Calls: incoming calls that you missed.
- Received Calls: incoming calls, both answered and missed.
- Dialed Calls: outgoing calls, both answered, unanswered and hung up.
- Blocked: an incoming call will be blocked (rejected) if it is from a person you have banned or if it does not match the security option you have specified.

Managing the Lists of Calls

You can open and close each list to show or hide its contents.

Icon	Meaning
	This group is currently empty.
	There are entries in this group.
	There are calls in this group, and at least one is an unanswered call.

	This group is currently expanded to show the contents.
	This group is currently expanded to show the contents. At least one call is an unanswered call.
	This call was answered.
	This call was unanswered.

You can select a list and click Calls in order to:

- Delete all entries from the list.

You can right-click on an entry in the Received or Dialed list to:

- Ban this person. This person will not be able to send you phone calls. You can change these privacy rules at any time; see [“Managing Contacts”](#) on page 29.
- Delete the call.
- Add to contacts. The Add Contact dialog box appears. Complete the dialog box and press OK. For more information on the fields, see [“Managing Contacts”](#) on page 29.

Privacy Management.

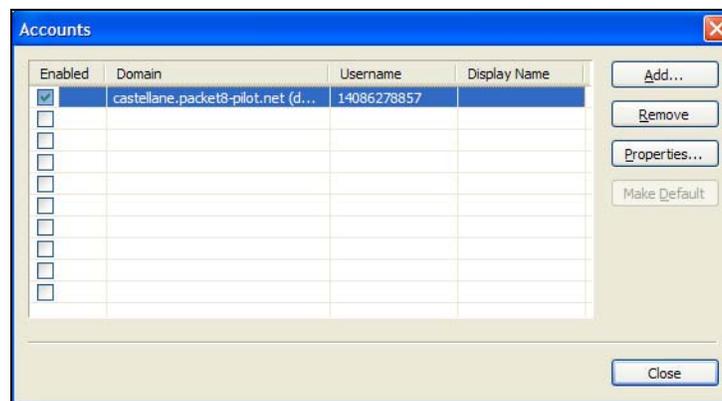


Figure 20: Privacy Management Window

You can allow or ban another person from contacting you. You can also ban a person in the Received, Dialed or Blocked list. Right-click on the name and choose Ban this Person.

The Video Wing

To bring up the Packet8 Softalk Office Video wing, click on the black button toward the extreme left edge of the main graphic display.



Figure 21: Video and Contact Wing Open

To start the video, click the *Start Video* button at the top of the screen.

You will see your own image at the bottom and image(s) of the other caller(s) at the top.

Packet8 Softalk Office allows you to pre-set your softphone to Auto-Video mode. When the Packet8 Softalk Office is set to this mode Packet8 Softalk Office enable video automatically when a call is established. To enable Auto-Video, simply click on the *AV* button on the top of the Video Wing.

To configure a video camera, click the *Video Tools*  button. The options available depend on the type of camera being used. For more information, please refer to the appropriate camera manufacturer's documentation.

You can close, detach, and reattach the Video Wing in the same manner as they would for the Contact Wing.

NOTE: A webcam is required in order to send video. However, you do not need one to receive video.

Application Hot Keys

Packet8 Softalk Office includes a number of keyboard shortcuts available for many functions. A list of these is shown in the table below:

Function	Keyboard Shortcut
Select Line 1	F1 or Ctrl + 1
Select Line 2	F2 or Ctrl + 2
Settings Dialog	F8 or Ctrl + 8
Diagnostic Window	F9 or Ctrl + 9
Toggle Letters-to-Digits	Space bar
Auto complete (number to dial)	Tab
Clear	Backspace
Dial	Enter
Auto-Answer (AA)	Ctrl + a
Do Not Disturb (DND)	Ctrl + d
Hang up	Ctrl + h
Call Ignore	Ctrl + i
Mute	Ctrl + m
Conference	Ctrl + n
Hold	Ctrl + o
Exit	Ctrl + q
Redial	Ctrl + r
Send to Voicemail	Ctrl + s
Paste	Ctrl + v

Function	Keyboard Shortcut
Inc/Dec Speaker Volume	Up/Down Arrows
Inc/Dec Microphone Volume	Right/Left Arrows

Packet8 Softalk Office Troubleshooting

The following is the troubleshooting guide for Packet8 Softalk Office.

Audio Problems

This guide assumes that your computer's sound and video system are working normally.

There are several factors that may affect sound quality when using Packet8 Softalk Office. These include the quality of the network connection, network device quality, and headset model. Some of the common problems experienced are given below, along with some useful tips on how to minimize their effect:

Audio Contains Pops at Loud Points in Voice

Popping sound is a symptom of over-modulation. Ask the other caller to decrease their microphone slider and/or adjust the microphone gain.

Audio Contains Bothersome Background Noise

Significant background noise can be due to the level of the silence threshold. Have the other caller adjust their silence threshold, which they can do by clicking on  and select Options- Devices.

Cannot connect client

Try the following steps:

1. Verify your user name is set up.
2. Verify user name is correct.
3. Verify that your voicemail password is correct (your voicemail password is the Softalk office password).
4. Verify you have an active Softalk Office account.

Audio Sounds Choppy in a Conference

Poor conference audio may be due to uploading bandwidth limitations. For example, some sites have 1 Mbps download bandwidth, but only 128 kbps upload bandwidth. Under such conditions, try multiple hosts for the conference.

Poor Sound

Poor or scratchy sound is a symptom of a problem with network connections, or a faulty network card. The following issues could contribute to poor sound quality:

- There may be packet loss on the IP network. Check the network performance, latency, and throughput. A 200 millisecond round trip latency as determined from a ping should deliver good audio quality.
- Older network devices may have performance problems. Make sure to use the latest driver.

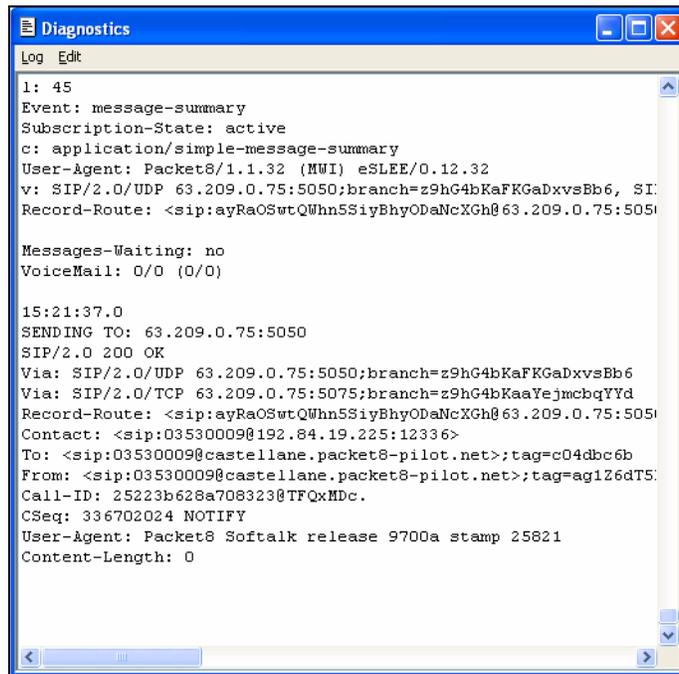
Audio Contains an Echo

The following tips may be useful for reducing echo heard during the conversation:

- Try using a headset plugged into the sound card. Another suggestion is to use a USB-enabled headset, which bypasses system sounds by acting as its own sound device.
- If using a boom type headset, note that some boom headsets can create feedback between the boom microphone and the headset earpiece.
- The microphone balance is not muted in the playback section of Windows audio controls. When configuring sound, examine the volume control setting.
- Echo will occur if the user's microphone can pick up sounds coming from the speakers used for the softphone call (when not using an integrated headset).
- The microphone level might be too high or the amplifier might be turned on in the generic Windows audio controls.

Diagnostic Log

Packet8 Softalk Office writes diagnostic information to a log file. You can view this log file by pressing **F9** on their keyboard. The log is rather cryptic, but when having difficulties with Packet8 Softalk Office, it may become necessary for the user to e-mail the log to their technical support representative.



```

Diagnostics
Log Edit
1: 45
Event: message-summary
Subscription-State: active
c: application/simple-message-summary
User-Agent: Packet8/1.1.32 (MWI) eSLEE/0.12.32
v: SIP/2.0/UDP 63.209.0.75:5050;branch=z9hG4bKaFKGaDxvsBb6, SI
Record-Route: <sip:ayRaOSwtQWhnSSiyBhyODaNcXGh@63.209.0.75:5050>

Messages-Waiting: no
VoiceMail: 0/0 (0/0)

15:21:37.0
SENDING TO: 63.209.0.75:5050
SIP/2.0 200 OK
Via: SIP/2.0/UDP 63.209.0.75:5050;branch=z9hG4bKaFKGaDxvsBb6
Via: SIP/2.0/TCP 63.209.0.75:5075;branch=z9hG4bKaaYejmcbqYYd
Record-Route: <sip:ayRaOSwtQWhnSSiyBhyODaNcXGh@63.209.0.75:5050>
Contact: <sip:03530009@192.84.19.225:12336>
To: <sip:03530009@castellane.packet8-pilot.net>;tag=c04dbc6b
From: <sip:03530009@castellane.packet8-pilot.net>;tag=ag126dT5
Call-ID: 25223b628a708323@TFQxMDC.
CSeq: 336702024 NOTIFY
User-Agent: Packet8 Softalk release 9700a stamp 25821
Content-Length: 0

```

Figure 9: Diagnostic Log