



August 2020 V1.1.1.96

Introduction

This manual contains all the information you need to know to operate Navigate Pro in conjunction with a SpliceCom system running SelectVoice software¹. This manual assumes that the Navigate Pro software has been installed on your PC by your system Administrator or system supplier.

Navigate Pro

Available as both a phone partner and softphone, Navigate Pro delivers advanced personal call management features for SpliceCom's broad range of IP desk phones, or existing 3rd party analogue telephones via your Windows laptop or PC. Providing point and click access to both commonly used and advanced SelectVoice features, Navigate Pro provides a single intuitive interface to manage business communications for all employees across a business, irrespective of their role.

Navigate Pro delivers ALL of the benefits associated with SpliceCom's top of the range IP phones. Calls can be made directly from your Windows laptop, or alternatively from your phone's keypad as normal. The same choice is available for call handling (answer, hold, transfer, park, pick-up, conference, etc.) as well.

Navigate Pro integrates Microsoft's Skype for Business and Outlook, fully integrating SelectVoice with these popular desktop apps.

The Navigate Pro software can be configured to run as an IP soft phone or as a partner to your PCS or Yealink telephone.

If Navigate Pro has been configured to partner your telephone it means that your telephone conversations will be via the handset however Navigate Pro will assist you to handle calls quickly and efficiently. If you are using your telephone with a headset your conversations will be via your headset and you can use Navigate Pro solely to handle the calls.

If Navigate Pro is running as an IP soft phone this means your PC becomes your telephone and you will require a headset and microphone connected in order to facilitate a telephone conversation, If you have a HID compatible headset (Jabra or Plantronics) then you will also be able to answer calls via the headset.

When the application is running, a Navigate Pro icon will be displayed in the Notification Area of your Taskbar. This will display applicable information when you make and receive calls as described in the relevant section in this manual.

Trademarks

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All other trademarks belong to their respective owners.

Notes:

¹ Navigate Pro will partner to SpliceCom PCS phones and will also run as a softphone if not using SelectVoice software, However Navigate Pro will not be able to use all the available SelectVoice features.

Supporting Documents and Licence Information

The following documents should be referred to in-order to get the best experience from Navigate Pro.

- 1) SelectVoice AdminPortal User Guide
- 2) Splice.com PCS user guide for your model of phone in partner mode operation
- 3) Splice.com Yealink Quick Reference guide for your model of phone.
- 4) This manual.

Licences (Non-Vision call centre working)

The following licences are required to unlock the extra functionality of Navigate Pro.

Navigate Skype For Business Licence

This licence allows Navigate Pro to integrate with Microsoft Skype For Business™. Please see page 46 for the full integration details.

Navigate Outlook Licence

This licence allows for the integration of Outlook contacts and calendar lookup, please refer to page 45 for further information.

Navigate Softphone Licence

This licence is required for Navigate Pro to be configured as a Softphone.

SelectVoice Version

In order for all the features of Navigate Pro 1.1.1.96 to work, the call server must be running SelectVoice 1.3.50 or greater.

Licences (Vision call centre working)

The following licences are required for a user to enable Vision call centre integration features.

Vision agent licence

This licence is required for Vision call centre agent working, Navigate Pro detects this and enables its own call centre working features in line with Vision call centre.

Table of Contents

| | |
|--|----|
| INTRODUCTION | 2 |
| TRADEMARKS | 2 |
| SUPPORTING DOCUMENTS AND LICENCE INFORMATION..... | 3 |
| NAVIGATE PRO OVERVIEW..... | 7 |
| OPERATIONAL ICONS | 7 |
| Main Window | 7 |
| Call Panel | 8 |
| Call Panel for Voicemail | 8 |
| Call History Window | 8 |
| Favourites Window | 8 |
| Contact Search | 9 |
| Call centre working (Requires Vision agent licence)..... | 9 |
| Miscellaneous..... | 9 |
| NAVIGATE PRO GUIDED TOUR..... | 10 |
| NAVIGATE PRO MAIN WINDOW | 10 |
| User Name/Extn..... | 10 |
| Login/Logout | 10 |
| Settings | 11 |
| Call History and Messages..... | 12 |
| Park Slots..... | 13 |
| Call Entry/Search and redial | 13 |
| NAVIGATE PRO CALL PANEL | 14 |
| SETTINGS AND USER CONFIGURATION..... | 15 |
| DND (Do NOT DISTURB) | 15 |
| USER MODE | 15 |
| DIVERT CALLS..... | 16 |
| DIVERT TO | 16 |
| OUT OF OFFICE..... | 17 |
| EXTENSION ANYWHERE..... | 17 |
| HELP | 18 |
| USER CONFIGURATION | 18 |
| USER CONFIGURATION ADVANCED TAB..... | 19 |
| USER CONFIGURATION ADVANCED (PARTNER) | 20 |
| IP Address..... | 20 |
| Port | 20 |
| CP | 20 |
| Login Code | 20 |
| Hot Desk..... | 20 |
| Speech output..... | 20 |
| Network Interface..... | 20 |
| ADVANCED (SOFT PHONE) | 21 |
| Gatekeeper..... | 21 |
| Alt Gatekeeper | 21 |
| Hot Desk Number and Hot Desk Code | 21 |
| SSL Enable | 21 |
| Speech and HID | 21 |
| Dual Output..... | 22 |
| Port | 22 |
| Primary IP Address | 22 |
| Windows Sound settings | 22 |
| ADVANCED (VOICEMAIL)..... | 23 |

| | |
|---|-----------|
| <i>Changing your daily Greeting</i> | 23 |
| <i>Changing your permanent Greeting</i> | 23 |
| ADVANCED (SEARCH FILTERS) | 24 |
| <i>Users Filter</i> | 24 |
| <i>Departments Filter</i> | 24 |
| <i>Contacts Filter</i> | 24 |
| <i>Favourites Filter</i> | 24 |
| <i>Companies Filter</i> | 24 |
| <i>Hide no number</i> | 24 |
| ADVANCED (OUTLOOK) | 25 |
| <i>Outlook Enable</i> | 25 |
| ADVANCED (SKYPE) | 25 |
| <i>Skype Integrated</i> | 25 |
| <i>Skype Docked</i> | 25 |
| <i>Navigate SFB Auto Start up</i> | 25 |
| <i>Skype DND Status</i> | 25 |
| ADVANCED (CALL PANEL) | 26 |
| <i>Hide</i> | 26 |
| <i>Inactivity Timeout</i> | 26 |
| <i>Location</i> | 26 |
| ADVANCED (FAVOURITE PANEL) | 26 |
| <i>Launch Favourite on Start-up</i> | 26 |
| <i>Enable Docking on Navigate Centre</i> | 26 |
| <i>Always on Top</i> | 26 |
| ADVANCED (HOT KEY DIALLING) | 27 |
| <i>Hot Keys</i> | 27 |
| ADVANCED (SYSTEM INFO) | 28 |
| SETTINGS (GENERAL) | 29 |
| <i>Call Waiting</i> | 29 |
| <i>Out of Office</i> | 29 |
| FOLLOW ME | 30 |
| SETTINGS (NUMBERS) | 31 |
| SETTINGS (DND EXCEPTION) | 31 |
| SETTINGS (FORWARDING) | 32 |
| FORWARD ON BUSY | 32 |
| FORWARD ON NO ANSWER | 32 |
| SETTINGS (FAVOURITE) | 33 |
| <i>Adding a new Favourite</i> | 33 |
| <i>Editing an existing Favourite</i> | 33 |
| <i>Deleting a Favourite</i> | 34 |
| USING FAVOURITES TO CONFIGURE YOUR PARK SLOTS | 34 |
| SETTINGS (RING TUNES) | 36 |
| <i>Ring tune types</i> | 36 |
| USING NAVIGATE PRO | 37 |
| MAKING AN OUTGOING CALL | 37 |
| <i>Entering additional digits</i> | 38 |
| ACCOUNT CODES | 38 |
| MUTE A CALL | 38 |
| REDIALLING A NUMBER | 39 |
| <i>To Call a Previous Caller Back</i> | 39 |
| RECEIVING AN INCOMING CALL | 39 |
| RECEIVING A DEPARTMENT CALL | 40 |
| ENDING A CALL | 40 |
| PLACING A CALL ON HOLD | 40 |
| PARKING AND PICKING UP A CALL | 40 |
| PICKING UP A CALL | 41 |
| <i>Favourites</i> | 41 |
| <i>Call Select</i> | 41 |

| | |
|--|-----------|
| ANNOUNCED TRANSFER | 42 |
| BLIND TRANSFER (UN-ANNOUNCED TRANSFER) | 42 |
| TRANSFERRING A CALL DIRECTLY TO A COLLEAGUE'S VOICEMAIL | 42 |
| CONFERENCING A CALL | 43 |
| <i>Cancel a conference call</i> | 43 |
| <i>End a conference call (partner mode only)</i> | 43 |
| CALL WAITING | 44 |
| USING VOICEMAIL | 45 |
| NAVIGATE PRO OUTLOOK INTEGRATION..... | 46 |
| NAVIGATE PRO SKYPE FOR BUSINESS INTEGRATION..... | 47 |
| NAVIGATE PRO DOCKING..... | 47 |
| USING NAVIGATE PRO TO SEARCH SKYPE CONTACTS..... | 47 |
| MAKING A CALL FROM SKYPE FOR BUSINESS | 48 |
| SKYPE FOR BUSINESS PRESENCE | 48 |
| NAVIGATE PRO VISION CALL CENTRE INTEGRATION | 49 |
| AGENT STATE | 49 |
| AGENT ACTIONS..... | 49 |
| LOGGING IN AND OUT OF THE CALL CENTRE | 49 |
| RAISING A HELP FLAG..... | 50 |
| SETTING A BUSY/NOT AVAILABLE STATUS..... | 51 |
| COMPLETION CODES AND WRAP UP TIMERS..... | 52 |
| EXTENDED WRAP UP AND COMPLETION CODES | 52 |
| PICKING UP A PARKED CALL AND MAKING A NEW CALL WHILST IN WRAP-UP | 52 |

Navigate Pro Overview

This section explains the Navigate Pro user interface and explains the meaning of the operational icons together with a guided tour of the main Navigate Pro windows.

Operational Icons

Navigate Pro has many features, these features are accessed by either clicking on an icon or by an icon being displayed when a feature is enabled, or a condition is met. The following tables show the Navigate Pro icons and there meaning.

Main Window

| | |
|---|---|
|  | Click to show either the Extn name or number |
|  | Navigate Pro is in Centralised Partner mode |
|  | Navigate Pro is in PCS Partner mode |
|  | Navigate Pro is in Softphone mode |
|  | Navigate Pro is in SSL (Secure Socket Layer) Mode |
|  | Allows you to login/out as a different user (Not available in Centralised Partner Mode) |
|  | Voicemail Message (Icon will flash showing that you have a new message) |
|  | Missed call (Icon will flash showing that you have had a missed call) |
|  | Click to show your Favourites (Speed dials) |
|  | Click to access the Navigate Pro Settings |
|  | Use this to dial the last number dialled |
|  | Park slots, use these to park calls instead of transferring a call |
|  | Shows that Outlook is configured to be integrated with Navigate Pro |
|  | Shows that Skype is integrated and ready to be used with Navigate Pro |
|  | Out of office In meeting set |
|  | Out of office At Lunch set |
|  | Out of office On Holiday set |
|  | Out of office Off Site set |
|  | Personal forward set |
|  | Dual Personal forward set |
|  | Dual All Personal forward set |
|  | Forward All calls set |
|  | Forward calls to my Mobile Enabled/Disable |
|  | Forward calls to my Home number Enabled/Disabled |
|  | Forward calls to my spare 1 number Enabled/Disabled |
|  | Forward calls to my spare 2 number Enabled/Disabled |
|  | Network connection issue/issue resolved |

Call Panel

-  Cancel/Hang-up a call
-  Pause/Place a call on hold
-  Click to Transfer a call
-  Use to Mute a call (Softphone mode only)
-   Mask or Unmask a recording, used for hiding the caller's personal information e.g. Credit card details
-  Switch between calls.
-  Setup a 3-way conference.
-  Display the Keypad so that DTMF digits can entered.
-  Account code entry.
-  Search Contacts.
-  Display favourites.
-  Call Select ready to use.
-  On a call click to reveal the call panel.

Call Panel for Voicemail

-  Cancel/Hang-up the call
-  Forward Message to a Colleague
-  Play or listen to the message again
-  Delete message
-  Save message
-  Rewind by 2 seconds
-  Fast Forward by 2 seconds
-  Skip back to previous message
-  Skip forward to next message

Call History Window

-  Signifies an unanswered (or missed) incoming call
-  Signifies an answered outgoing call
-  Signifies an unanswered outgoing call
-  Signifies an answered incoming call
-  Unread Message
-  Old or Read Message

Favourites Window

-  Favourite is Idle
-  Favourite is ringing
-  Favourite is on a call
-  Group Icon
-  Leave a group to get back to the main favourite screen

Contact Search

| | |
|---|-----------------------------------|
|  | Contact from SelectVoice database |
|  | Contact from Outlook |
|  | Contact from Skype |
|  | Work Contact |
|  | Mobile Contact |
|  | Home Contact |

Call centre working (Requires Vision agent licence)

| | |
|---|--|
|  | Vision agent available |
|  | Vision agent not available |
|  | Vision agent codes and features |
|  | Vision agent logout from call centre |
|  | Vision agent request help/Help requested |
|  | Agent functions menu |

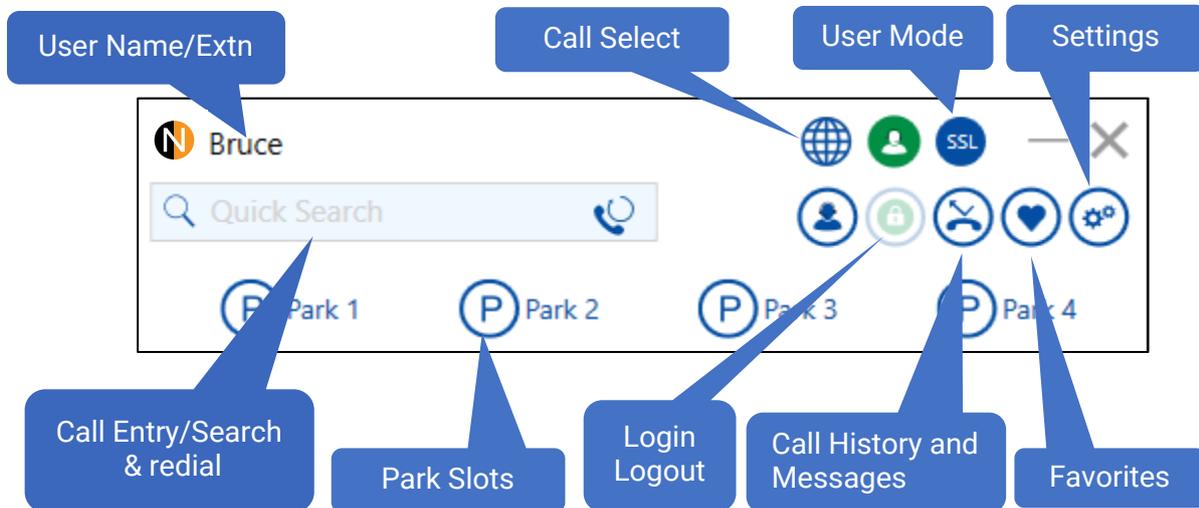
Miscellaneous

| | |
|---|---|
|  | Call volume muted |
|  | Call volume MIN |
|  | Call Volume next level |
|  | Call Volume next level |
|  | Call Volume MAX |
|  | Keypad Button 1 |
|  | Keypad Button 2 and letters AB and C |
|  | Keypad Button 3 and letters DE and F |
|  | Keypad Button 4 and letters GH and I |
|  | Keypad Button 5 and letters JK and L |
|  | Keypad Button 6 and letters MN and O |
|  | Keypad Button 7 and letters PQR and S |
|  | Keypad Button 8 and letters TU and V |
|  | Keypad Button 9 and letters WXY and Z |
|  | Keypad Button 0 |
|  | Keypad Button * |
|  | Keypad Button # |
|  | There has been an error, please contact your reseller |
|  | Voicemail Greeting ICON |
|  | User Manual |
|  | Quick Reference Guide |

Navigate Pro Guided Tour

Navigate Pro has several windows that are displayed at various times when making and receiving calls, the two main operational windows are described below.

Navigate PRO Main window



User Name/Extn

Next to the user mode, your username is displayed, clicking on the icon changes the display and toggles between displaying your username and extension number.

Login/Logout

Allows Navigate pro to be used as a hot desk phone, where various people that use the same PC can login as themselves in order to receive and make phone calls.

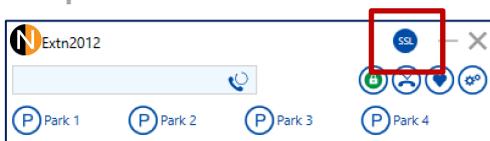
Call Select

If enabled this feature¹ will allow a user to be logged onto three devices (1 x Softphone 1 x Desk phone and 1 x iPCS) simultaneously and have the ability to move a call between those devices by clicking the Call Select globe icon.

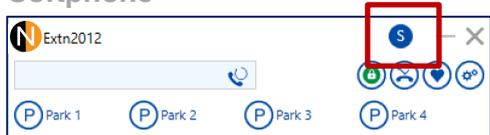
User Mode

Navigate Pro can work in two modes, Softphone and Partner mode, when running in Softphone mode Navigate Pro acts like a desk phone but on your computer, allowing you to have all the functionality of real phone on your desk. In Partner mode Navigate Pro will partner to your PCS desk phone or Yealink SIP Phone and allow you to control it from your desktop.

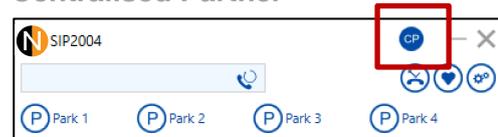
Softphone SSL



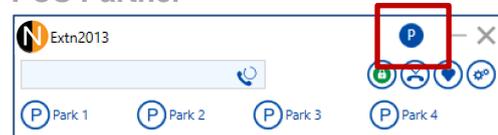
Softphone



Centralised Partner



PCS Partner



¹ Requires SelectVoice SV1.3 or above

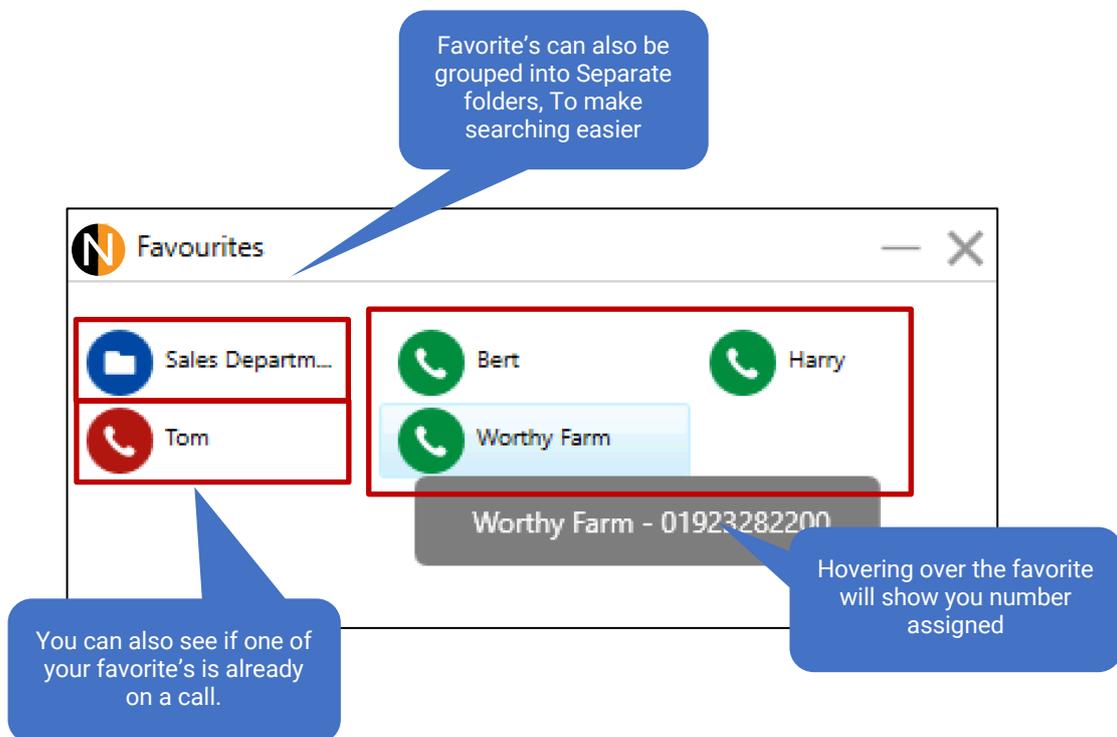
Settings

Clicking on settings allows you to change your preferences, set your forwarding, DND state, Out of Office status and make changes to your user configuration. See page 15 for further details.



Favourites

The Favourites window shows your speed dial and speed dial groups, together with the current call state of the extensions and departments being shown. See page 34 for further details on how add/delete and amend favourites.



Call History and Messages

Call history shows you your missed, incoming and outgoing calls together with any voice messages that have been left for you. See page 43 for details.

Right clicking on an entry will bring up a selection bar that gives you 4 actions that you can perform on an history entry.

Copy the number to your clipboard
Add the number to the contacts directory
Add the number to your favourites
Delete the call history entry

Call Type icon

Click to Enlarge and Restore view

Click to see Voicemail Messages only.

Name or Number of caller

Contact Source

Number Called/Received

| Time | Name | Source | Number | Mailbox |
|-----------------|----------|--------|--------|----------|
| 16:39 28/6/2019 | SIP2004 | 📞 | 2004 | Extn2013 |
| 16:18 28/6/2019 | SIP2004 | 📞 | 2004 | Extn2013 |
| 15:59 28/6/2019 | SIP2004 | 📞 | 2004 | Extn2013 |
| 15:59 28/6/2019 | SIP2004 | 📞 | 2004 | Extn2013 |
| 15:58 28/6/2019 | SIP2004 | 📞 | 2004 | Extn2013 |
| 15:57 28/6/2019 | SIP2004 | 📞 | 2004 | Extn2013 |
| 15:46 28/6/2019 | SIP2004 | 📞 | 2004 | Extn2013 |
| 14:44 28/6/2019 | Extn2012 | 📞 | 2012 | Extn2013 |
| 14:40 28/6/2019 | Extn2012 | 📞 | 2012 | Extn2013 |

Each column within the call history window can be re-sized as well as re-ordered.

Clicking on the mail icon (✉) removes all the call history except for mail messages. Right clicking on the Voicemail entry brings up an extra icon.

Call the person back that left the voicemail.

Shows if a message is read or unread.

| Time | Name | Source | Number | Mailbox |
|-----------------|---------|--------|--------|----------|
| 17:09 28/6/2019 | SIP2004 | 📞 | 2004 | Extn2013 |
| 17:00 28/6/2019 | SIP2004 | 📞 | 2004 | Extn2013 |

Park Slots

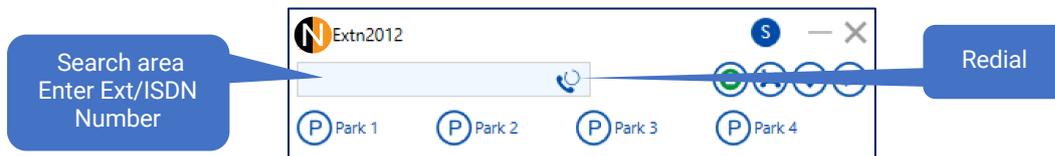
The SelectVoice system has a number of configurable park slots but displays 4 as standard. Park slots give an alternative method of dealing with a call instead of using a transfer. Details of the caller are shown against the relevant Park Slot and they are held until they are picked up.

(Please refer to the Installation and Maintenance Guide for instructions on how to do this)



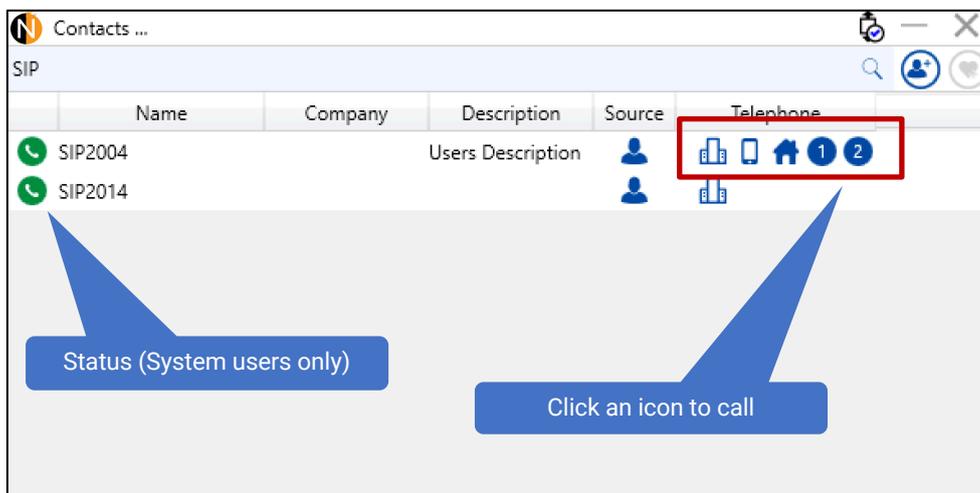
Call Entry/Search and redial

To make a call enter the Ext/ISDN number to be called in search area of the main Navigate Pro window, as you type the contacts window will appear showing you all found items so far. If you are searching for a user the search window will show the status of that user in the first column, for example if they are already on a call.



Each entry displayed shows all the possible numbers assigned to that contact in the Telephone column.

- Work Number
- Mobile Number
- Home Number
- Spare 1 Number
- Spare 2 Number

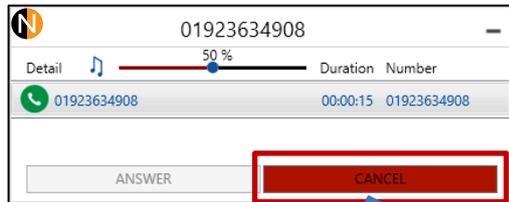


Clicking on the redial icon allows you to redial the last number dialled.

Navigate Pro Call Panel

When making or receiving a call Navigate Pro will display the call panel at the configured position (See page 24 for details on how to change the call panel position), the call panel is a dynamic window which changes depending on the progress of the call.

Outgoing Call Panel



Click to cancel call or hang-up if in partner mode

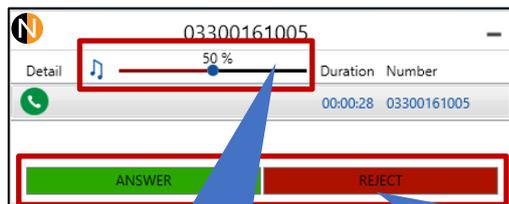
Answered Outgoing Call Panel



In call options

Call Information

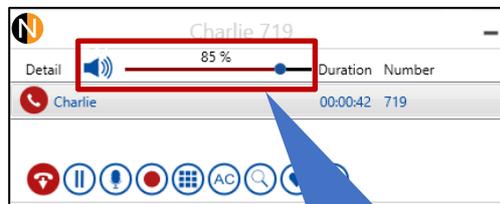
Incoming Call Panel



Ringling volume (If in softphone mode)

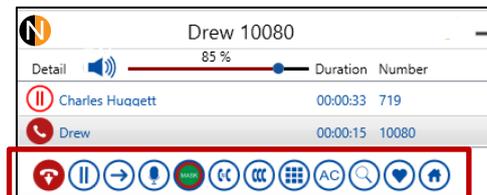
Click Answer to accept the call or Reject to close the call or send the call to voicemail (If enabled)

Answered Incoming Call Panel



Call Volume (If in softphone mode)

Transfer and Conference call Panel



In call options

Settings and User Configuration

The settings option allows you configure common user settings as well as some more advanced options used for Skype for business and Outlook integration (These should have been previously configured by your installer or system administrator). The following section describes each option and how to use it.

DND (Do Not Disturb)

The Do Not Disturb facility allows you to set your extension as permanently busy. This is useful if, for example, you are holding a meeting in your office and do not wish to receive any calls.

To set DND against your user, click on the settings icon and click on the DND option.



When DND has been set Navigate Pro will show the DND icon in the status bar. Your calls will be automatically passed to your Forward on Busy number, if configured, or to voicemail, if enabled, or the caller will receive busy tone. Calls will be logged in your Missed Calls list.

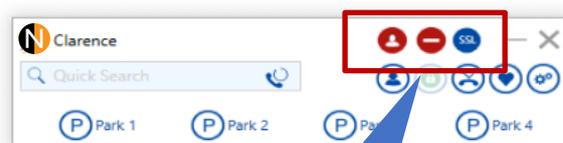
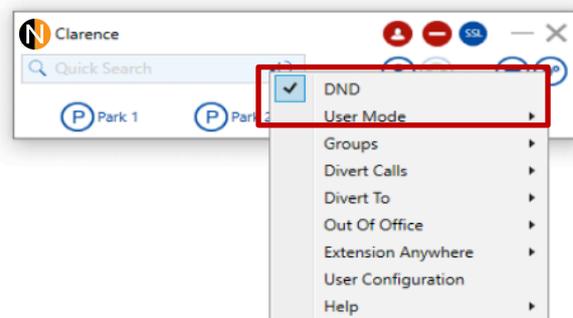
If Navigate Pro is being used in Partner mode, then when you lift your handset you will hear broken dial-tone to remind you that DND has been enabled.

User Mode

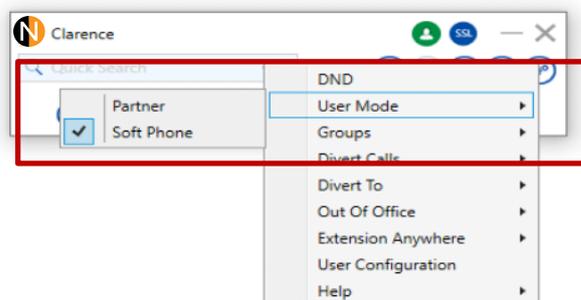
Navigate Pro software can be configured to run as an IP soft phone or as a partner to your telephone.

If your Navigate has been configured to partner (Desk Phone) your telephone handset this means that your telephone conversations will be via the handset but Navigate will assist you to handle calls quickly and efficiently. If you are using your telephone with a headset your conversations will be via your headset and you can use Navigate solely to handle the calls.

If your Navigate Pro is running as an IP soft phone this means your PC becomes your telephone and you will require a headset and microphone connected in order to facilitate a telephone conversation.



Double Click to remove DND

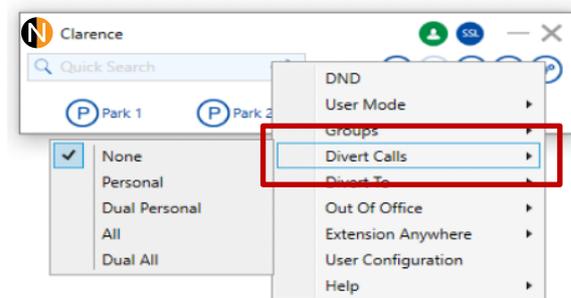


Divert Calls

This facility allows you to configure your extension so that your calls follow you to an internal extension or to an external number so that when you are, for example, working at another desk, working at home, or using your mobile etc, your calls will still reach you. You could also use this feature when you are, for example, on holiday and wish all your calls to be diverted to your assistant or another colleague

To set a Divert click the settings icon and select Divert Calls, you will see a sub menu with a number of selections.

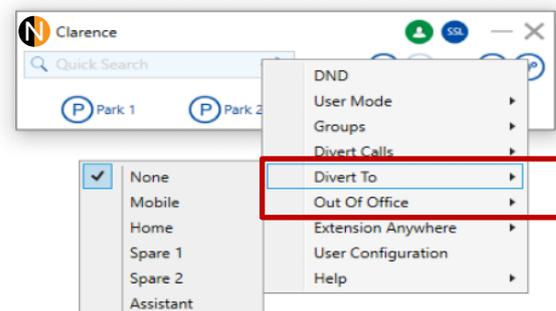
- 1 **Personal** – all calls to your extension and direct line number will be diverted.
- 2 **Dual Personal¹** – all calls to your extension and direct line number will be forwarded, however your extension will also ring. This will ensure that you can pick up the call wherever you are.
- 3 **All** – all calls to your extension, direct line number and any Department calls will be diverted.
- 4 **Dual All¹** – All calls to your extension, direct line number and any Department calls will be forwarded, however your extension will also ring. This will ensure that you can pick up the call wherever you are.



Divert To

Select which number to divert your calls to from your Personal Numbers (Mobile, Home, Spare1 Spare2 or Assistant) These can be set separately.

- 1 **Mobile** Divert calls to your mobile
- 2 **Home** Divert calls to your home number
- 3 **Spare** Divert calls to one of two spare number's



The divert to menu is dynamic and will only show the selection where a number has actually been set against it.

Note

¹The Dual Personal and Dual All options are useful if you are in role where you are constantly moving away from your desk. You could set your Divert to your mobile, for example, so that you can answer calls wherever you are, and when you are back at your desk you do not need to turn off Divert to answer the calls at your desk.

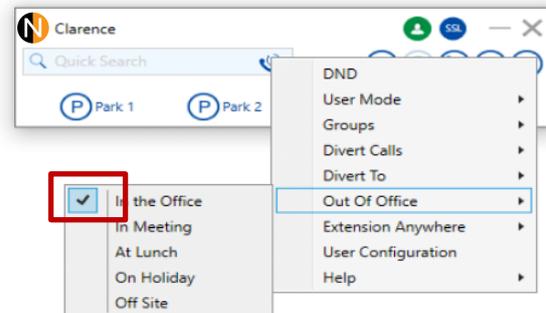
Out of Office

When you are unable to answer your phone, you may wish to inform your colleagues of your whereabouts and when you will be available. An Out of Office Message can be configured, and this will be displayed on your colleagues' Navigate or PCS Device.

There are five Out of Office states to choose from:

-  **In the Office**
-  **In Meeting**
-  **At Lunch**
-  **On Holiday**
-  **Off Site**

To set an out of office message click on the appropriate state, you will see a tick appear next the selected option.

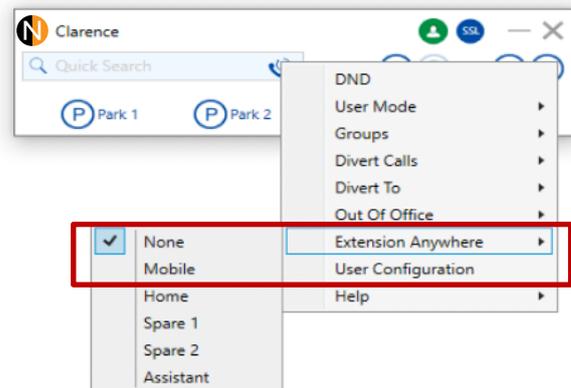


Extension Anywhere

If you are a user of a PCS IP phone or analogue handset and Navigate Pro is partnering this telephone you can use the Extension Anywhere feature when you are, for example, working from home. This feature will allow you to receive and make calls from, for example, a home telephone or mobile as though you were in the office. This means callers/recipients will be unaware that you are working from home, you will not incur any call charges and you will be able to handle the call as if you were in the office, e.g. transfer calls.

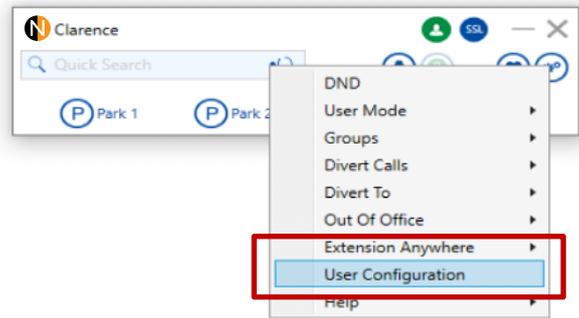
To turn on Extension Anywhere click on the Settings icon and select Extension Anywhere from the menu from here select the number you wish to use, e.g. Mobile or Home. The options listed here will be dependent on the numbers stored within your User account.

To turn off Extension Anywhere select None from the menu selection.



User Configuration

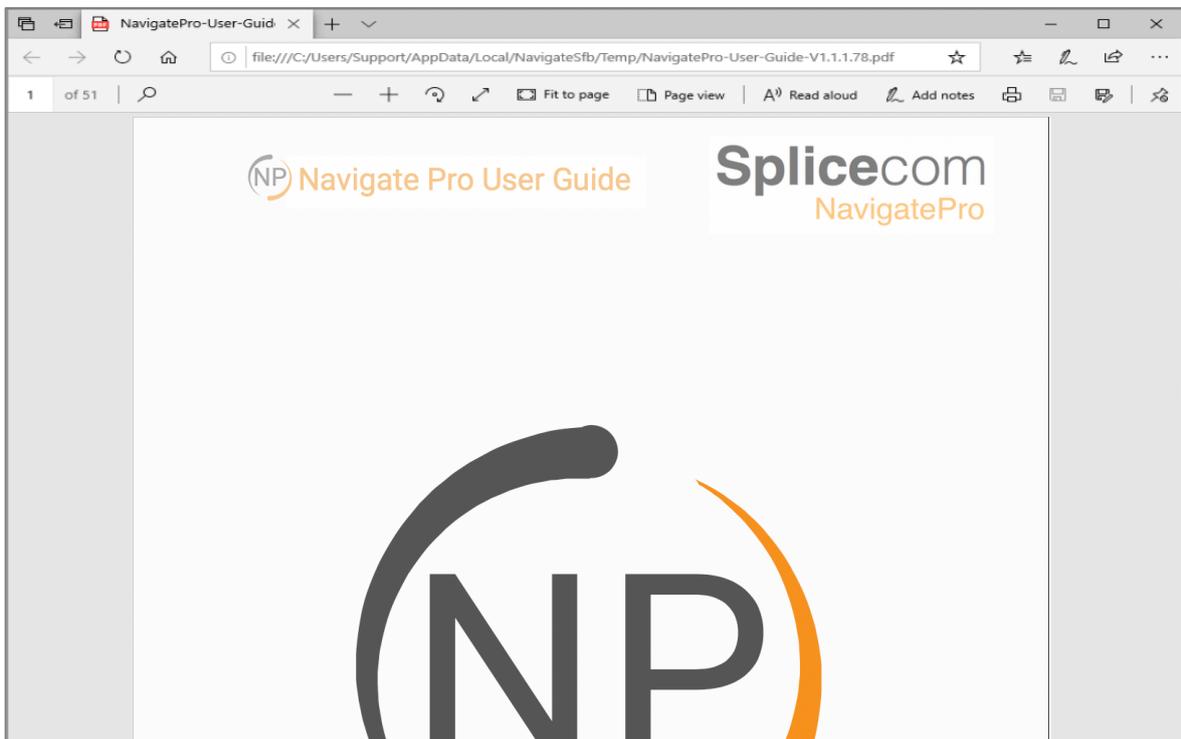
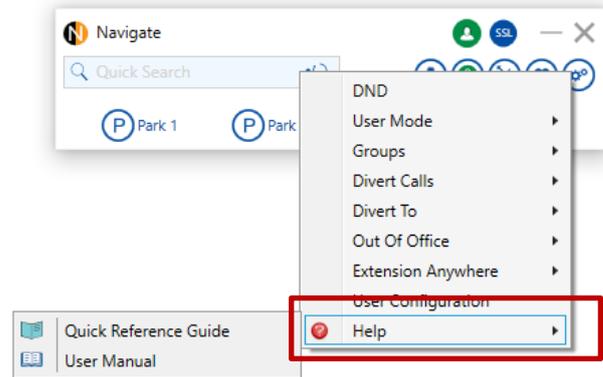
For more advanced user configuration, click on the settings icon and select User Configuration, you will be taken to a separate window with the extra settings, by default you will be taken to the Advanced tab first.



Help

Clicking on Help will allow you to download the on-line manuals.

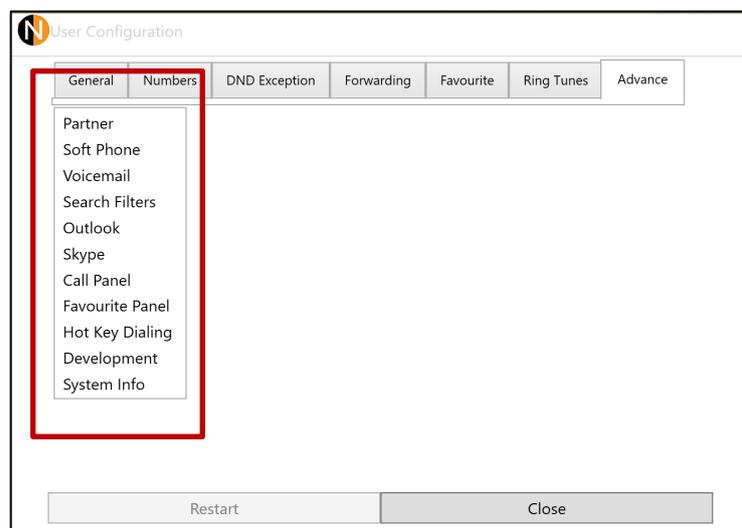
NOTE: The first time you click on the user manual menu item Navigate Pro will download the manual from the internet, subsequent times will be quicker as the manual has already been downloaded.



User Configuration Advanced Tab

The Advanced tab has a number of Sub selections that can be selected, the next section will go through each of the section in turn.

| | |
|-------------------------|--|
| Partner | Sets up PCS and Centralised Partner configuration. |
| Soft Phone | Sets up Softphone operation for Local and SSL. |
| Voicemail | Allows you record your Voicemail greetings. |
| Search Filters | Set what categories you can search. |
| Outlook | Setup Outlook Integration. |
| Skype | Enable Skype Integration. |
| Call Panel | Personalise the Call Panel. |
| Favourite Panel | Set the Favourite Panel Preferences. |
| Hot Key Dialling | Configure Hot Key Dialling. |
| Development | Reserved for Reseller and Splice.com use. |
| System Info | Shows Navigate Pro version information. |



User Configuration Advanced (Partner)

If Navigate Pro is going to be configured to be a partner to your handset there are several settings that need to be configured for this to work, in most cases these options will have been configured for you and must not be changed, however here is a brief description of each field for your information. Please refer to your system administrator for further details if required.

IP Address

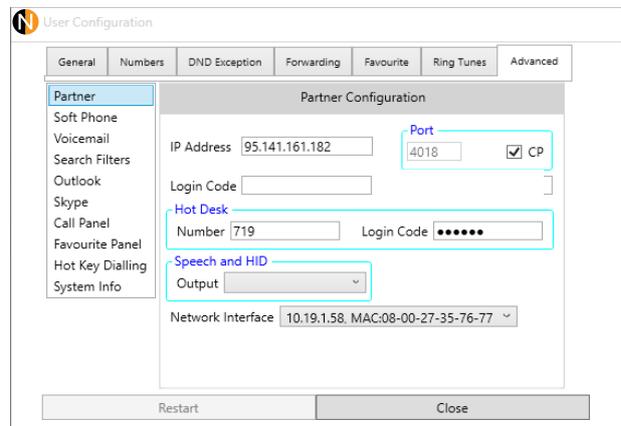
The IP address of the module or PCS IP Phone that the Navigate application will connect to. If you are using Centralised Partner, then this becomes the IP address (Internal or External) of the call server the Yealink phone is homed to.

Port

The number corresponding to the port on the module entered in the IP Address field that Navigate will be partnering. This will always be 5001 if partnering a PCS IP phone.

CP

Ticking CP enables centralised partner mode, this allows Navigate Pro to control a Yealink phone, just like Partner mode for PCS devices. When you tick CP it automatically changes the port to 4018.



Login Code

The digits entered in the handset's Partner Login Code field on the system configuration, this is used when you are partnering a PCS Phone device.

Hot Desk

These fields, in conjunction with the Port and Partner Login Code fields, can be used to assist you if you are a hot desking User. These fields can be configured to allow you to log on to more than one choice of handset and your Navigate will automatically partner any of these handsets. This is useful if, for example, you are a laptop user and when you come in to the office you log on to any available phone at any available desk. Navigate can be configured once to partner any of these handsets.

If you are using Centralised Partner, then you must enter in the Hot-desk Number field your user's extension number and your login code in the login Code field. Please refer to your system administrator for further information.

Speech output

This will be taken from the setting on your PC, otherwise use the drop-down list to select the Speakers or any HID devices you would like to use for playing ringing etc.

Network Interface

If your PC has several Network interfaces configured, select the interface you want Navigate Pro to use.

Advanced (Soft Phone)

If Navigate Pro is going to be configured as a Soft Phone there are several settings that need to be configured for this to work in most cases these options will be configured for you and must not be changed, however here is a brief description of each field for your information. Please refer to your system administrator for further details if required.

Gatekeeper

The IP address of the Call Server or SSL Gateway that the Navigate Pro application will connect to.

Alt Gatekeeper

The IP address of the Call Server or SSL Gateway that the Navigate Pro application will connect to if the Main Gatekeeper fails.

Hot Desk Number and Hot Desk Code

These fields, in conjunction with the Port and Partner Login Code fields, can be used to you if you are a hot desking User. These fields can be configured to allow you to log on to more than one choice of handset and your Navigate Pro will automatically partner any of these handsets. Please refer to your system administrator for further information.

STUN Server and Port

If you intend to user SRTP you will need to enter a STUN server (Name or IP address) together with a STUN Port number, normally 3478.

SSL Enable

Check to enable the SSL (Secure Sockets Layer) connection for this user.

SRTP Enable

Check to enable SRTP (Secure Real-time Transport Protocol) audio for this user.

Speech and HID

Use this to select what speakers and Microphone you wish to use or if you want to use a compatible HID headset.

Supported Headsets

Currently NavigatePro supports:

- Plantronics
- Jabra
- Sennheizer (To be added at a later date)

INPUT: This will be taken from the setting on your PC, otherwise use the drop-down list to select the Microphone you would like to use¹

OUTPUT: This will be taken from the setting on your PC, otherwise use the drop-down list to select the Speakers you would like to use¹

Dual Output

Tick this if you want ringing to be heard on both the headset and the PC.

Port

Port number used by the SSL Gateway. SSL Enable: to enable the SSL connection for this application.

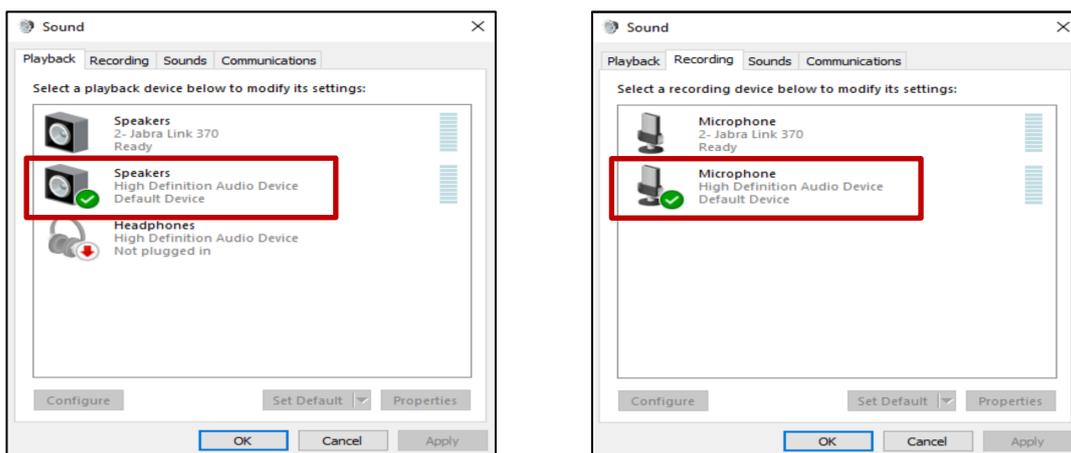
Primary IP Address

If your PC has several Network interfaces configured, select the interface you want Navigate Pro to use.

Windows Sound settings

It is important that the Windows sound settings are setup correctly as NavigatePro will always attempt to use the default sound devices for Playback and Recording.

It is therefore recommended that the PC's Speakers and Microphone are set as default, these settings can be found under Advanced Sound Options.



¹ If you use a Bluetooth or USB headset then the input and output sound source will automatically change when the headset is turned on/off.

Advanced (Voicemail)

If you have voicemail enabled, you can record two voicemail greetings. The first is a daily greeting that you would normally update on a daily basis, typically giving the date and your whereabouts/availability. The second is a permanent greeting that can be used on any day. If you choose to record a permanent greeting your daily greeting will be deleted at midnight and the permanent greeting will then be used until you record a new daily greeting.

Changing your daily Greeting

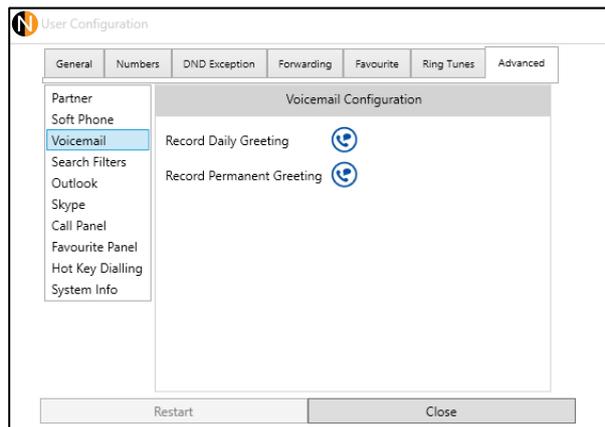
Click on the Record Daily Greeting Icon

Your existing Daily Greeting will be played back to you, if you want to re-record your greeting you will be prompted to record your new greeting, after you have recorded your greeting click the Hang up icon.

Changing your permanent Greeting

Click on the Record Permanent Greeting Icon

Your existing Permanent Greeting will be played back to you, if you want to re-record your greeting you will be prompted to record your new greeting, after you have recorded your greeting click the Hang up icon



Advanced (Search Filters)

The Directory provides access to a database of contact information that is stored centrally on your SelectVoice system. Your system administrator is responsible for the maintenance of this database and will be able to assist you with your queries.

The type of records displayed are determined by the selected filters select or de-select the options as required.

Users Filter

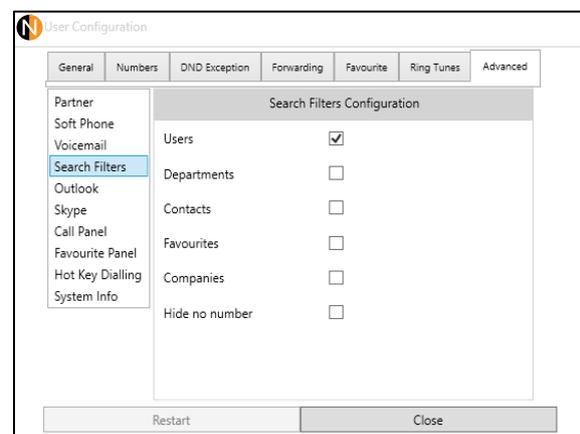
If checked this will display a list of the User accounts on your SelectVoice system allowing you to quickly and easily call a colleague. The search will be made within the User's Display Name field. If the User's First Name and Last Name fields have been populated the search will also be made within the Last Name field enabling, you to search on someone's surname

Departments Filter

This will give access to the list of Departments configured on your SelectVoice system that will allow your call to be routed efficiently to a group of Users.

Contacts Filter

This will display the list of external contacts entered on your SelectVoice system allowing you to quickly and easily make calls to customers, suppliers, etc. The search will be made within the Contact's Name field. If the Contact's First and Last Name fields have been populated the search will also be made within the Last Name field enabling, you to search on someone's surname.



Favourites Filter

Will give access to the Speed Dials stored within your User account.

Companies Filter

This will display the list of external contacts entered on your telephone system allowing you to quickly and easily make calls to customers, suppliers, etc. The search will be made within the Contact's Company field, if populated.

Hide no number

If Hide no number is ticked, any contacts without a telephone number assigned to them will not be shown in any of the contact searches.

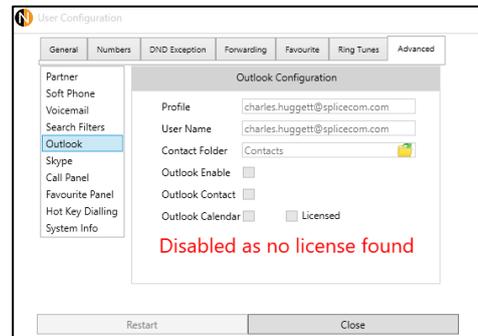
Advanced (Outlook)

If you use Microsoft Outlook for your calendar and storing your contacts, your User account can be configured to enable you to turn on Outlook Contact Lookup and Outlook Calendar Lookup in Navigate. Outlook Contact Lookup will enable Navigate Pro to search within your Contacts¹ so that you can easily and quickly dial numbers stored in your Outlook Contacts. To enable this feature, you will have to setup your Outlook Profile and select the contact folder to use.

Outlook Enable

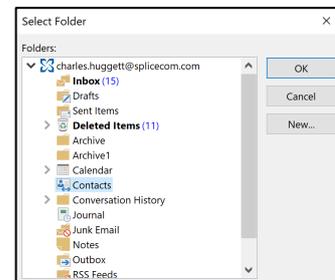
If your user has the appropriate licence then Outlook Contact and Calendar will automatically be ticked, the licence tick box will also be checked.

If your user does not have a valid licence then you will see a warning telling you that Outlook functionality is disabled.



So that you can use Outlook Contacts you first have to enable this feature by clicking the Outlook Enable check box. Then select your Contact folder by clicking in the Contact Folder field and selecting the folder to use from the directory search window.

Click on the contacts folder, the user name will be automatically filled out.



Advanced (Skype)

Navigate Pro has the ability to interact with Skype for Business for searching contacts and altering presence docking and auto start-up, to change enable these features.

Skype Integrated

When checked, Navigate Pro will search your Skype For Business contacts as well.

Skype Docked

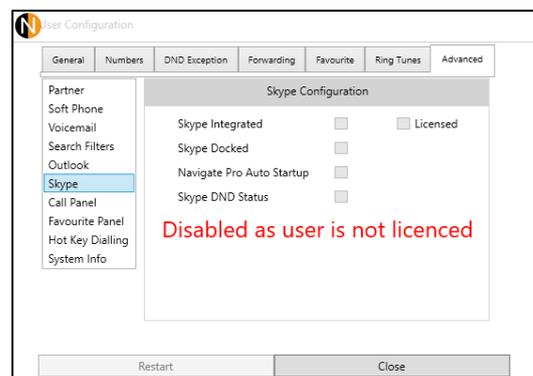
Check to dock Navigate Pro with Skype For Business, so you have one seamless application.

Navigate SFB Auto Start up

Allows Navigate Pro to auto start when you start Skype For Business.

Skype DND Status

To stop Skype receiving another call whilst you are on a SelectVoice call check this option, otherwise Skype will make you unavailable, in this state you could receive a Skype call.



¹This feature requires a licence, please see your system Administrator for further details.

Advanced (Call Panel)

You can change the position and way Navigate Pro's Call Panel acts when on a call, by default the call panel will appear in the bottom right corner and will fade out in 15 seconds. To change this click use the following options:

Hide

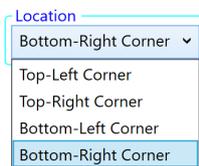
Check to allow the call panel to hide itself after the inactivity timeout expires.

Inactivity Timeout

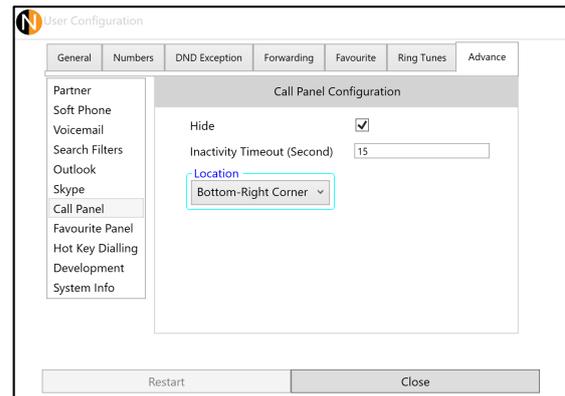
Amount of time in seconds it takes for the Call Panel to fade out.

Location

You can choose which corner of the screen the call panel appears:



The call panel will default to the bottom right hand corner of the screen.



Advanced (Favourite Panel)

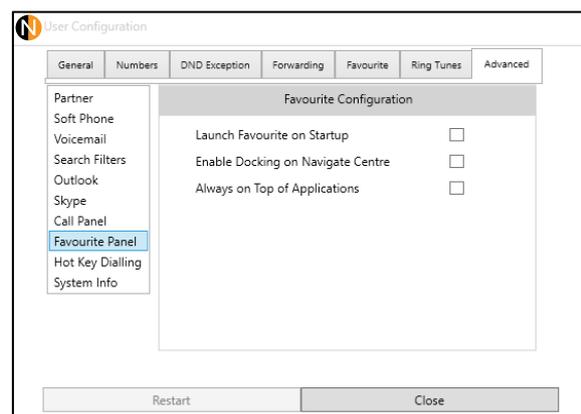
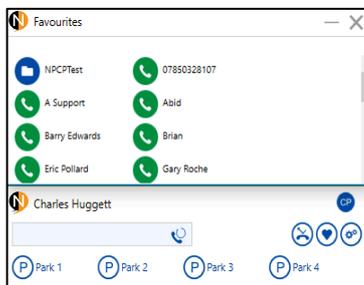
You can have your favourites window dock with Navigate Pro so that are visible at all times.

Launch Favourite on Start-up

When checked the favourites window will be launched at the last known position when Navigate Pro is started.

Enable Docking on Navigate Centre

Check to attach your favorites window to the top of Navigate Pro.



Always on Top

Selecting always on top makes the favorites panel appear on-top of any windows application.

Note:

When the favorites window is attached the window, controls move from the main Navigate Window to the Favorites window

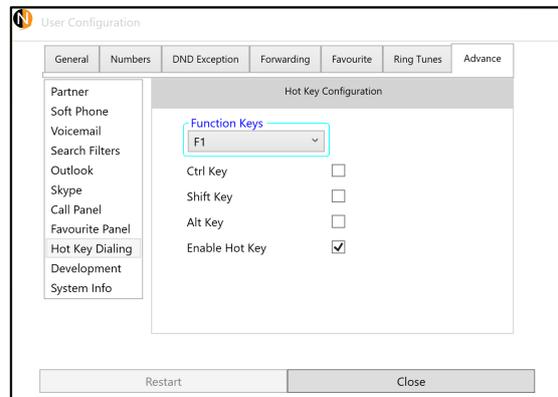
Advanced (Hot Key Dialling)

You can set a Dial Hot key which will enable you to dial numbers stored within a Microsoft document or within a website viewed via Internet Explorer.

Hot Keys

Select the Key combination you wish to use by selecting the function key from the drop-down menu followed by any other sequence of Ctrl, Shift or Alt.

Once you have selected your key sequence tick Enable.



Advanced (System Info)

The System information window shows the current version of Navigate Pro and any previous version information.

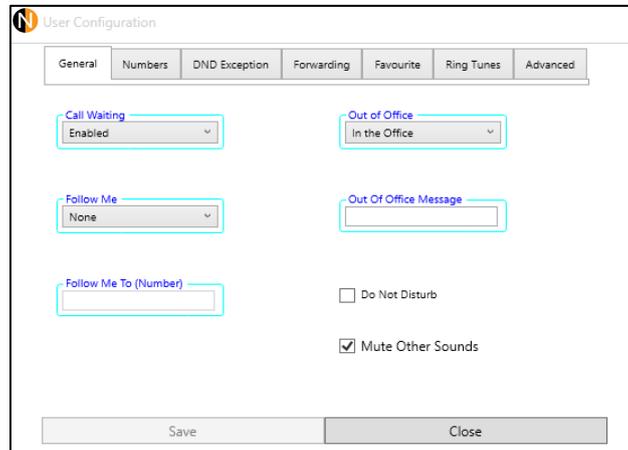
Your current login and licencing information are also shown, this may be needed by your reseller if you are experiencing any issues.

The screenshot displays the 'System Information Configuration' window within the 'User Configuration' application. The window has a sidebar menu with options like Partner, Soft Phone, Voicemail, Search Filters, Outlook, Skype, Call Panel, Favourite Panel, Hot Key Dialling, and System Info. The main content area shows version details and login information. Two callouts are present: one pointing to the version information and another pointing to the login information.

| General | Numbers | DND Exception | Forwarding | Favourite | Ring Tunes | Advanced |
|---|---------|---------------|------------|-----------|------------|----------|
| System Information Configuration | | | | | | |
| Current Version: 1.1.1.86 Internal Version: 1.0.0.47 | | | | | | |
| Previous installed Version: 1.1.1.85 (Internal v47) | | | | | | |
| Copyright @ 2018 SpliceCom Ltd. All Rights Reserved. | | | | | | |
| Login Information | | | | | | |
| SpliceCom Support - not for resale.CallServer 00-12- | | | | | | |
| Supplied by SpliceCom Ltd | | | | | | |
| User: Charles Extension 4022 | | | | | | |
| Restart | | | Close | | | |

Settings (General)

The SelectVoice system gives you the ability to configure features such as call waiting, forwarding, do not disturb. Navigate Pro enables you to configure these settings via the General Tab.

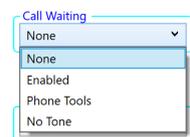


Please note that these settings are stored in your User account and therefore will follow you when you log on to another handset or PC running Navigate Pro.

Call Waiting

Call waiting allows you to handle a second call whilst being connected to another call, there are 4 selectable states that can be chosen: -

- None** Call waiting is disabled, subsequent calls will get busy or Go to voicemail (If enabled).
- Enabled** When you get a second call Navigate Pro will alert you that you have a second call and you will also get an audible alert in your headset or handset.
- Phone Tools** Currently not supported.
- No Tone** When you get a second call Navigate Pro will alert you that you have a second call but you will not get an audible alert.

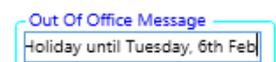
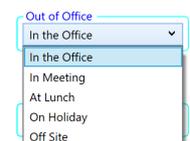


Select the type of Call Waiting you require and then click save, see page 39 to see how to use call waiting.

Out of Office

Users may wish to inform internal callers when they are unavailable. The message selected will be displayed on the caller's pcs56x/57x Phones and on Navigate Pro when you pre-dial a number or perform a directory look up.

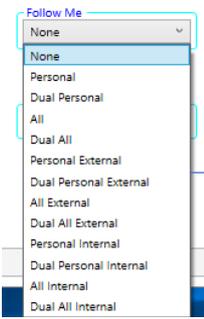
You can also create your own Out of Office Message, e.g. "On Holiday until Tuesday, 6th Feb", By using the Out of Office Message Field. (Please refer to the relevant user manual for further details.)



Follow Me

The Follow Me feature will allow you to take calls, for example, on your mobile or at home, when you are out of the office or at another extension if, for example, you are spending the day in another part of the building or in another office.

| Follow Me | Icon | Description |
|------------------------|---|--|
| None | | Calls will not be forwarded. |
| Personal |  | All calls to your extension and personal DDI will be forwarded. |
| Dual Personal |  | All calls to your extension and personal DDI will be forwarded, and your phone will ring. |
| All |  | All calls to your extension will be forwarded including any calls to a department that you might be a member of. |
| Dual All |  | All calls to your extension will be forwarded including any calls to a department that you might be a member of, and your phone will also ring. |
| Personal External |  | All external calls to your extension and DDI will be forwarded |
| Dual Personal External |  | All external calls to your extension and DDI will be forwarded, and your phone will also ring. |
| All External |  | All external calls to your extension and DDI will be forwarded including any calls to a department that you might be a member of. |
| Dual All External |  | All external calls to your extension and DDI will be forwarded including any calls to a department that you might be a member of, and your phone will also ring. |
| Personal Internal |  | All internal calls to your extension will be forwarded. |
| Dual Personal Internal |  | All internal calls to your extension will be forwarded and your phone will also ring. Any calls to a department that you may be a member of, will also ring on your extension. |
| All Internal |  | All internal calls to your extension will be forwarded including any calls to departments you may be a member of. |
| Dual All Internal |  | All internal calls to your extension will be forwarded including any calls to departments you may be a member of, and you phone will also ring. |



Settings (Numbers)

You can add your Home and Mobile telephone numbers entered via the Settings, Numbers tab. You can also use the Spare1 and Spare2 Telephone Number fields to enter two additional numbers if required.

Please note: If the Ex Directory option is ticked your number's will not appear in a Directory search made by another user.

These numbers will also be matched against incoming CLI and display the User's name in Caller Display. It is therefore very important that extension numbers are not entered into these fields.

The screenshot shows the 'User Configuration' dialog box with the 'Numbers' tab selected. The 'Telephone' field contains '2830'. Other fields for 'Mobile', 'Home', 'Spare 1', 'Spare 2', and 'Assistant' (with '0' entered) are empty. At the bottom, there are 'Save' and 'Close' buttons.

Settings (DND Exception)

You may wish to turn on Do Not Disturb but still receive a call from a colleague or an external number.

This is useful if you are expecting an urgent or important call but do not wish to be disturbed by other calls. The relevant number can be set as a Do Not Disturb exception as follows.

The screenshot shows the 'User Configuration' dialog box with the 'DND Exception' tab selected. A list displays 'Telephone 719'. Below the list are 'Del' and 'Add New Entry' buttons. The 'Add New Entry' button is highlighted with a red box.

To add a number exception, enter the extension number or ISDN number into the Add New Entry Field, then click OK to add the new number.

This is a close-up of the 'Add New Entry' dialog box. The input field contains '819' and there is an 'OK' button to its right.

To remove a number, highlight the number you wish to delete. And then click the Del button.



This is a close-up of a list item 'Telephone 819' which is highlighted with a blue selection bar.

Settings (Forwarding)

The Forward on Busy feature will redirect your calls to either an internal or external number when you are on an existing call or have Do Not Disturb set. This is useful if you wish to ensure your calls are answered by your assistant or another member of your team.

To have your calls forwarded to another extension or ISDN number first select the forwarding type from the drop-down box

| Forward Type | Description |
|-----------------------|--|
| None | Forwarding is disabled, no calls will be forwarded. |
| Internal and External | All internal and External calls to you will be forwarded |
| Internal | Only internal calls will be forwarded |
| External | Only External calls will be forwarded |

Forward on Busy

After selecting the type of forward enter the number you wish to forward your calls to into the number field. Then click save to activate your forward.

Forward on No Answer

After selecting the type of forward enter the number you wish to forward your calls to into the number field. Then click save to activate your forward.

Settings (Favourite)

The Favourites section of your User Configuration form allows you to set up your own personal list of regularly used telephone numbers (internal or external). These are displayed and accessed within the Favourites window by click on the Favourites icon . Favourites set up for internal extensions will also act as Busy Lamp Fields (BLF) in other words they will indicate when that user is on the phone.

| Description | Short Code | Telephone |
|-------------|------------|-----------|
| Analogue 1 | | 2831 |
| Analogue 2 | | 2832 |
| Analogue 3 | | 2833 |
| Analogue 4 | | 2834 |
| Analogue 5 | | 2835 |
| Analogue 6 | | 2836 |
| PCS573 | | 2839 |
| Yealink | | 2019 |

Adding a new Favourite

To add a new Favourite first enter the description followed by a short code. Finally, enter the Internal or External number to be dialled.

Description

Short Code

Telephone

Click Add to save your new entry.

Editing an existing Favourite

To change an existing Favourite entry, find the first favourite by using the scroll bar to move up and down the list and then select the Favourite to edit by clicking on it, this will then Hi-lighting the entry you wish to edit.

| Description | Short Code | Telephone |
|-------------|------------|------------|
| Accounts | | 0192320020 |
| Bill | G:1,1 | 718 |
| Charlie | | 719 |
| Dev Guys | GH1 | |
| Drew | | 10080 |
| Haley | | 10008 |
| Jade | | 714 |
| Paul | | 718 |

The information for the selected Favourite will appear in the edit fields, make the required changes to the description, short code or telephone number.

Description

Short Code

Telephone

And then click Update to commit your changes.

Deleting a Favourite

To delete an existing favourite entry, find the first find the favourite by using the scroll bar to move up and down the list and then select the Favourite to edit by clicking on it, this will then Hi-lighting the entry you wish to edit.

| Accounts | Description | Short Code | Telephone |
|----------|-------------|------------|--------------------|
| Bill | | G:1,1 | 019232002,0 718 |
| Charlie | | | 719 |
| Dev Guys | | GH:1 | |
| Drew | | | 10080 |
| Haley | | | 10000 |
| Jade | | | 714 |
| Paul | | | 718 |

The information for the selected Favourite will appear in the edit fields,

Description

Short Code

Telephone

And then click Delete to remove the entry.

You will be prompted with a delete confirmation Click Yes to delete your favourite or No to cancel

Delete Confirmation ✕

Are You Sure?

Using Favourites to configure your Park slots

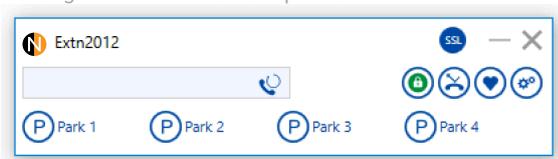
By default, all Users of Navigate, PCS 58x, 57x and within your company will have icons/buttons to access park slots 1-4. However, you can choose to:

- Remove all the Park slots. This would be useful if, for example, you don't use the Park facility and you wish to have more room for your Favourites.
- Create park slots to access alternative park slots. This would be useful if you need a park slot that is only going to be used by the colleagues in your department, or you would like an icon to a park slot only used by yourself, for example.

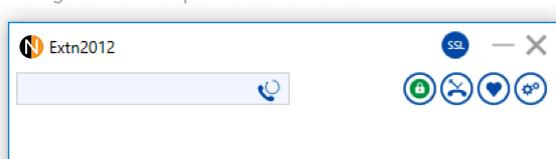
To remove all park slots from Navigate Pro create a Favourite with a telephone number of slot0

Telephone

Navigate Pro with standard park slots.



Navigate Pro with park slots removed.



Notes:

- 1) If a telephone number entered in your Favourites is also stored in the Contacts or Users directory, when a call is made to or received from this number, the text entered in the Description field of the Favourite will be displayed in Call Status in preference to the name used in the corresponding Contact or User directory entry.
- 2) For numbers that you dial regularly you may prefer to assign a short code to a Favourite so, for example, you could dial just 33 to ring 01632953492. (Please note that the short code you use must not be the same as a short code you are already using for other system functionality, please refer to your System Administrator for further assistance.)

To create alternate Park slots, for example Park slot 20, create a new Favourite with a telephone number of slot20. If you want to give your new Park slot a specific name, then enter a colon: followed by the text of the Park Slot. If you leave the description blank, then for this example the description will default to 'Park 20'

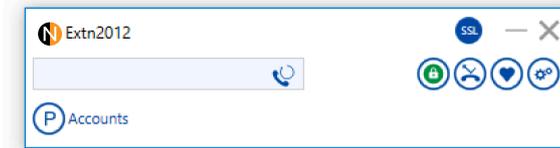
Custom Park Slot configuration

Description

Short Code

Telephone

Navigate Pro shows the custom description



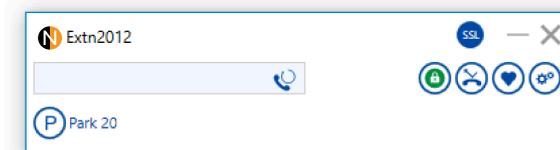
Standard Park Slot configuration

Description

Short Code

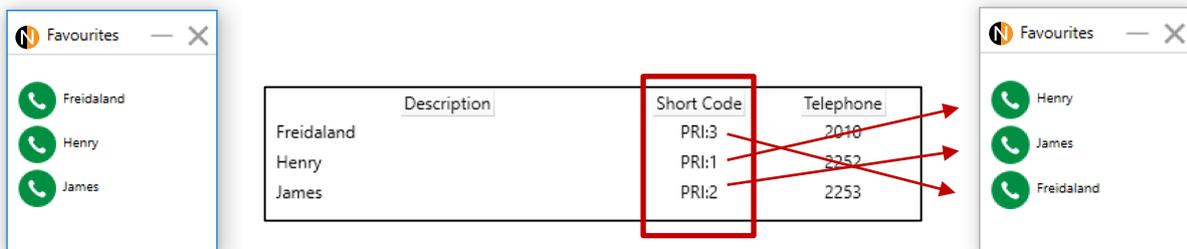
Telephone

Navigate Pro shows a standard park slot



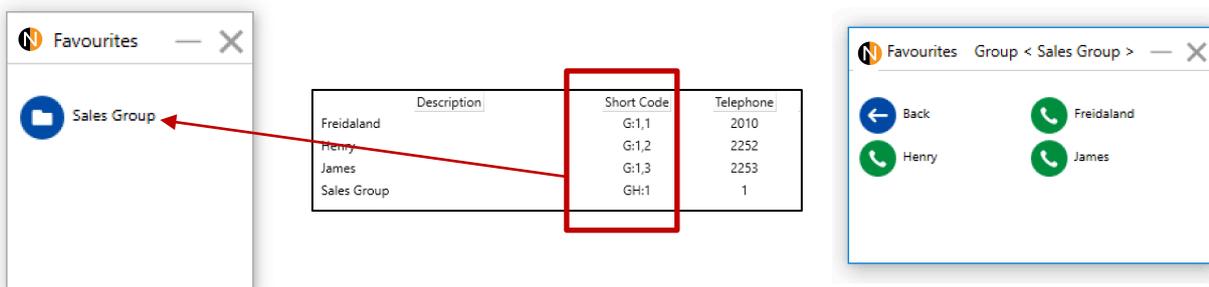
All Favourites and Favourite Groups will be displayed in alphabetical order. However, if you wish to display your Favourites in a different sequence a display order number can be assigned using the following methods.

If you wish to specify where a Favourite will be displayed in your Favourites window, in the Short Code field enter the characters PRI: followed by a number for the priority, e.g. PRI:1.



You can also group your Favourites in their own folders, to do this first create a group header by using the following characters in the Short Code field GH:1 where the number represents the group number.

If you wish to specify where a Favourite assigned to a Favourite Group will be displayed within that group, in the Short Code field add a comma and then the order number required, e.g. G:1,1.



Settings (Ring Tunes)

The Ring Tunes section of the User Configuration form allows you to use ring tunes played by your Navigate Pro application to distinguish between the different types of incoming calls, for example, between a Department call and a call to your User account. Your PC must have a sound card in order to use the Ring Tunes facility and the selected ring tune will be played over your PC's speakers. If you are using Navigate Pro application to partner a PCS IP phone this configuration will also affect the ring tune used by these handsets. Any other telephone handset will continue to use one of its pre-set ringing cadences.

Ring tune types

There are 6 ways in which you can customise your ring tune, these can be selected from the type drop down list in the Ring Tunes window.

- System
- Internal
- External
- Call ID
- Destination
- Dual Ringing

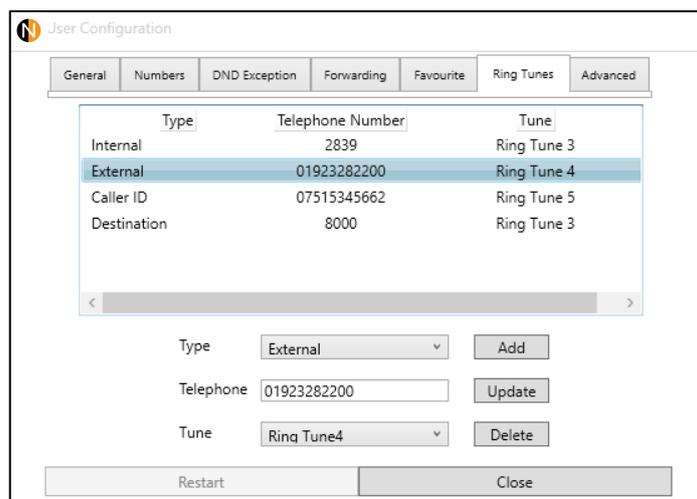
| | |
|---|--|
| <p>System</p> <p>Internal</p> <p>External</p> <p>Call ID</p> <p>Destination</p> <p>Dual Ringing</p> | <p>Use System to distinguish calls generated by the telephone system, for example voicemail call-back.</p> <p>Play a specific ring-tune when receiving an internal call</p> <p>Play a specific ring-tune when receiving an external call</p> <p>Play a ring-tune when receiving a call from a specific number</p> <p>Differentiate a Department call from a call to your extension</p> <p>If you have Follow Me Dual Personal or Dual All set against your user, you may wish to have a different ring tune played to remind you that this feature has been set.</p> |
|---|--|

Enter the internal (User or Department) or external number into the Telephone number field

Telephone

Select the ring-tune you wish to use from the drop Down list

Tune



Using Navigate Pro

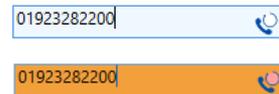
This section covers the day to day use of Navigate Pro, any changes that occur where in a different operational mode (SSL (Secure Socket Layer), Centralised Partner, Partner or Softphone) will be highlighted.

Making an Outgoing call

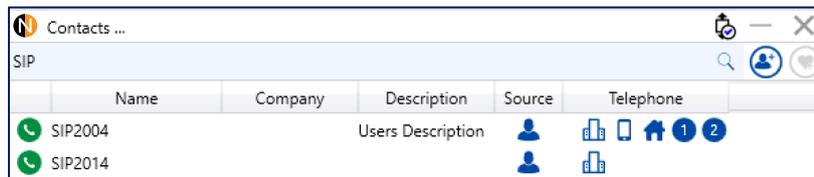
Dial the extension or ISDN number by entering it in the Number Entry Field in the main Navigate Pro window.

If your user has been given restricted contact status, then the Number entry field will show orange. This means that when entering a number, only internal numbers will be shown.

(You can also use your handset if in Partner mode)¹



As you enter the number or name the Contacts window will be displayed showing you matches against the number or name you are calling.



Press the enter key to make the call (Or use your phone to make the call)

Navigate Pro by default integrates with SelectVoice's comprehensive contact database, but it also has the ability to integrate with Microsoft Outlook and Skype for Business² So if the person you are looking for is either in Outlook or Skype contacts they will also be displayed in the contacts window with an icon in the source column telling you where the contact was found.



In each case the Work, Mobile and Home numbers are shown if populated in their respective contact database.



To call that person click on the appropriate icon or press return to call the number entered in the number entry field.

The call Panel will display the outgoing call details, if you wish to cancel the call, click on the CANCEL button.



Notes:

¹ If you are calling an extension and it is busy or not answered within 20 seconds (default) you will be passed to voicemail, if enabled.

² Additional license's will be required if you wish to use Outlook or Skype For Business integration.

Entering additional digits

You may be required to enter further digits once a call has been made, for example when presented with an auto attendant or you need to enter a credit card number.

This can be done as follows:

Within the Call Status pane click on the Dial icon 

The Keypad window will be displayed

Select the number(s) required either by clicking on the numbers with your mouse or enter the numbers on your keyboard.

Use the Close icon at the top right to close the Keypad window when you have finished.



Account Codes

Accounts codes on a SpliceCom system enable calls to be tracked. This feature would be useful if you wish to bill customers for time spent on their job or calculate the cost of a project for example.

Please refer to your system administrator for further details if you wish to use this facility.

Once configured on your system, you can apply the relevant account code to a call.

From Call Status click on the Add Account Code icon 

the Enter Account Code window will be displayed. Enter the code required and select OK. (Please refer to your system administrator for the relevant digits to enter.)



Mute a call

The Mute facility will allow you to prevent a caller from hearing, for example, your conversation with another colleague. You will be able to hear the caller, but they will not be able to hear you.

Click the Mute icon from the Toolbar  the Mute icon will be displayed with a red cross to indicate that this facility is on  click this icon again to talk to your caller.

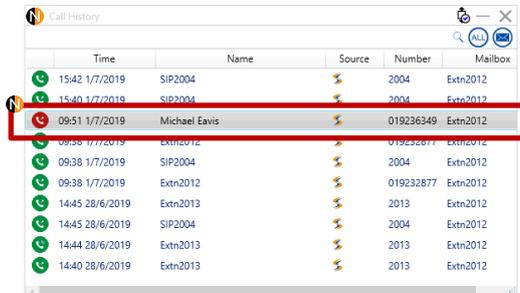
Redialling a number

To redial the last number, you called hover the magnifying glass, in the Number Entry field, the last number you called will appear, click to make the call.



To Call a Previous Caller Back

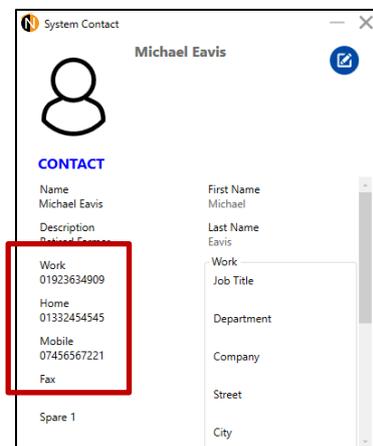
Click the call history button



A list of previously made, received and missed calls will be displayed, select the call you wish to call back and double click on the highlighted line to make the call.

If you wish to call the person back on another number Single click on the source icon to see the other numbers, you can use. Depending on the database the person is in the source icons could be:

- SelectVoice Contact Database
- Microsoft Outlook contact.
- Skype for business contact

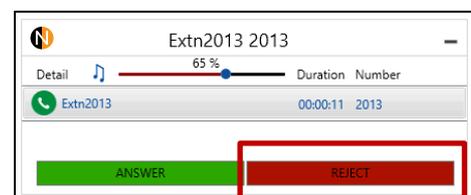


Receiving an incoming Call

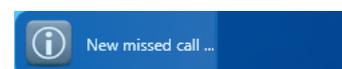
The call panel will pop showing you the calling party details, click on the Answer button to answer the call.



If you do not wish to answer the call press the Cancel button the call will be passed to your Forward on Busy number (if set), or to voicemail (if enabled), or cancelled. (If your phone is busy or not answered within 20 seconds (default) the caller will be passed to voicemail, if enabled.)

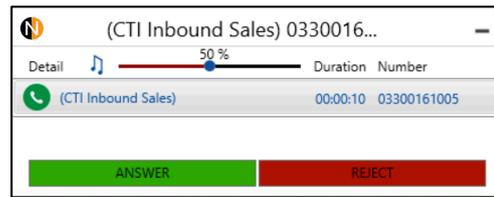


If for some reason you miss a call, you will see a missed call alert, clicking on the Information button will open the call history window so you can see the call details.



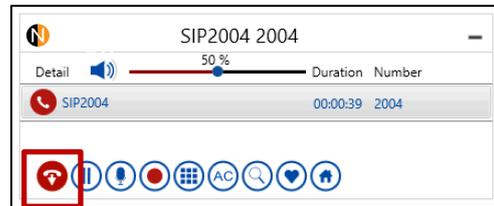
Receiving a Department call

If you take calls for a department then you will see the department name shown so that you can answer the call accordingly.



Ending a Call

To end a call, click on the  icon in the call panel or hang-up the call on the phone if Navigate Pro is in partner mode.

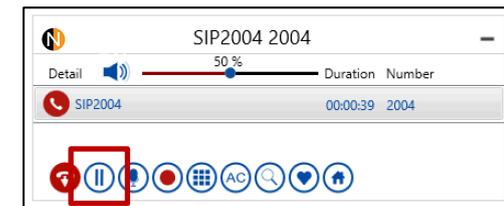


If you have ended a department call you may see a Wrap up timer, this allows you to finish any paperwork you may need to complete. You can cancel the wrap timer by clicking on the cancel wrap button .



Placing a Call on Hold

Click the Call Hold Key to place the call on hold.  To retrieve the call, click the Call Hold Key again. If Navigate Pro is in Partner mode, you can also use your phone to place the call on hold. Please refer to your phone's manual on how to do this.



Parking and Picking up a Call

The Park facility on a maximiser system allows a call to be put on hold in a system area rather than on the user's extension. This has the benefit of releasing the user's extension to receive further calls. Either the user can pick up the call to continue the conversation or the call can be picked up by another extension on the system.

By default, you will be given access to Park slots 1, 2, 3 and 4 via the four Park icons displayed in the main Navigate Pro window. By default, all your colleagues using Navigate Pro or PCS 58x/57x/56x and Yealink phones will also have access to these same park slots. (This default configuration may be different on your system, please refer to your system administrator for further details.)

When on a call click one of 4 Park keys to park the call¹



The caller's details (Name or Number) will be displayed against the relevant Park Slot, to pick up the call identify the person you wish to pick-up and click the button for the relevant park slot.



Notes:

¹ The SelectVoice system has 4 park slots as default, these can be removed, decreased or added to, please refer to the User manual for your system to do this and the section on Favourites later in the manual.

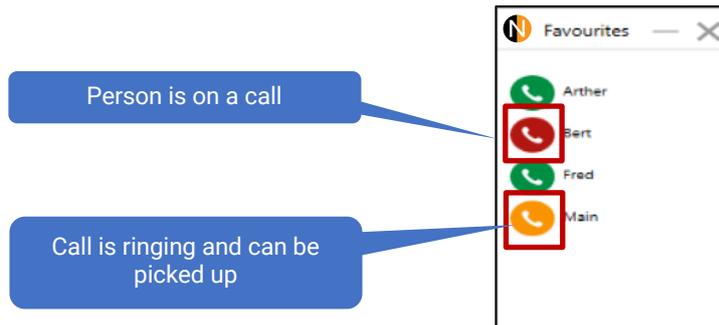
Picking up a Call

There are several ways that you could pick up a call:

Favourites

When a call is ringing on a user of a department and you have that user or department set as a favourite you will see the colour change from green to orange. Clicking on the favourite will pick-up the call that is ringing.

Your system administrator may also have setup a global pick-up where you can pick up any ringing call.



Call Select

The Call Select feature¹ allows a user to be logged into 3 devices at the same time (Desk phone, iPCS and softphone) if you answer a call on your desk phone and want to pick the call up on Navigate Pro then by pressing the Blue Globe² you can move the call from the current device to Navigate Pro.



Notes:

¹ Call Select is only available for users who are not part of a department or are a Vision call centre agent.

² The globe will only appear if call select is enabled for a user (Please see your system Administrator for details)

Transferring a call

When you are on a call you may need to transfer that call to another person, Navigate Pro allows you to either do an Announced Transfer (You speak to the caller the call is being transferred to first) or a Blind Transfer (You transfer the call direct without talking to the person you are transferring the call to).

Announced Transfer

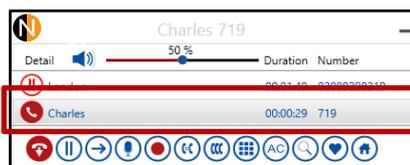
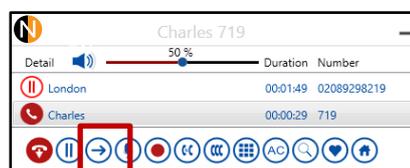
Place the call on hold by clicking the Hold icon  Then entering the number you wish to transfer the call to in the Number Entry Field and then pressing return. Please refer to your phones user manual to perform this process on your phone.

 Calls can be transferred to External as well as internal numbers.

Alternately enter number you wish to transfer into the Number Entry Field and press return, your current call will automatically be placed on hold.

When the called party picks up the call, announce the transfer and then click the Call Transfer icon to complete the transfer.

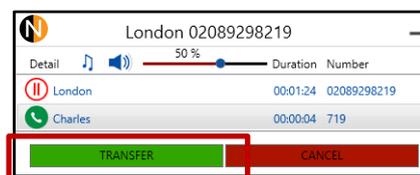
To return to the original call, make sure the current call is highlighted in the Call Panel and then click on the Hang-up Icon.



Blind Transfer (un-announced transfer)

To Blind transfer a call to another user without talking to them, enter the number you wish to call into the Number entry field.

Wait for the called parties phone to ring and then click the Transfer Button.



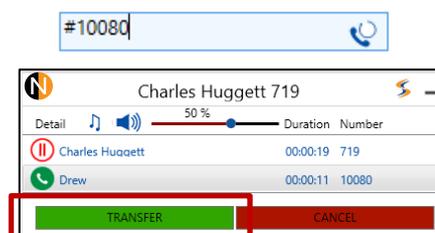
Transferring a Call Directly to a Colleague's voicemail

If you know the person you wish to transfer the call to is away or in a meeting you can transfer a call directly to that person's voicemail.

To do this place the call on hold the by clicking the hold icon 

Dial the internal number prefixed with a #¹ i.e. #10080 if you wanted to transfer the call to Extn 10080's voicemail.

Press the Transfer key again to complete the transfer



Notes:

¹ Your SelectVoice system could be setup differently, please refer to your system Administrator for details.

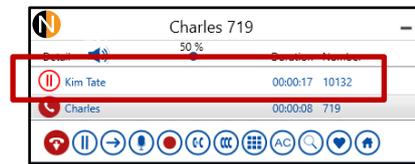
Conferencing a call

If you are on a call and wish to conference another person in to that call, enter the Ext of the person you wish to join and press enter, your existing call will be placed on hold whilst the new call is ringing.

(You can use the search facility or your favorites as well)



The existing call will be placed on hold.

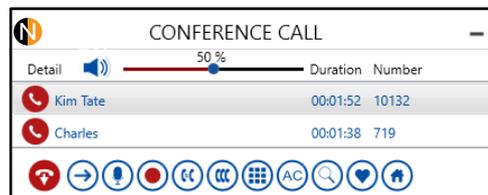


You can switch between the calls by clicking the switch icon  in the call panel the switched call will be placed on hold.



To join all parties into a conference, click on the Conference icon. 

The call panel will show both calls in a conference.



Cancel a conference call

You may wish to cancel the conference and return to a 2-way conversation with your calls by pressing the switch icon 

You can return to a conference with your two calls at any time by selecting the Conference icon.

If you select either of the Hang Up icons while on a conference you will hang up the caller that you were last speaking to before creating the conference and return to a 2-way conversation with the other call.

It is best to cancel the conference and return to a 2-way conversation first before attempting to hang up a caller.

If one of the conference members hangs up, you will return to a 2-way conversation with the other caller.

End a conference call (partner mode only)

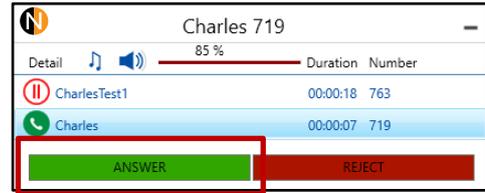
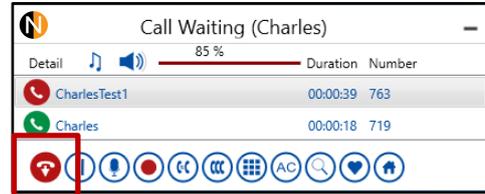
If you replace your handset while on a conference call, you will end the conference and hang up all the calls.

Call Waiting

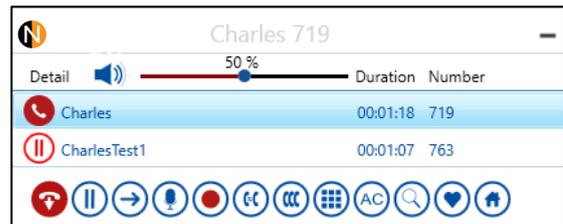
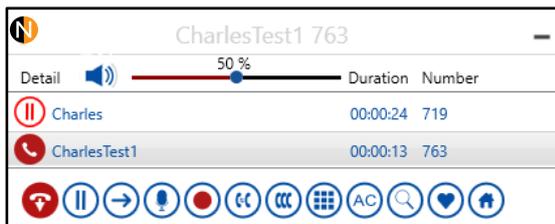
When a second call is received you will hear an intermittent beep via your telephone handset (partner mode) or Navigate Pro software, and the Call Waiting message will appear on the Navigate Pro call panel.

You can either hang-up your existing call by clicking on the hang-up button  and answering the new call.

Alternatively, you can click on the new call, this place's the existing call on hold and allows you to answer the new call.



You can then switch between both calls, by clicking on the call you want to talk to, the call you were previously on will be placed on hold.



Using Voicemail

Navigate Pro allows you to access your voicemail by clicking the Message/Missed calls  icon to show your messages and missed calls, if you have any unread messages left for you the message indicator  will flash, alerting you to any messages.

You will also receive a sliding message notification.



Click the Message/Missed calls icon to show your messages and missed calls, if you wish just to see your messages click the message only icon .

| | Time | Name | Source | Number | Mailbo |
|---|----------------|----------|---|--------|----------|
|  | 17:10 1/7/2019 | SIP2004 |  | 2004 | Extn2012 |
|  | 17:09 1/7/2019 | SIP2004 |  | 2004 | Extn2012 |
|  | 17:08 1/7/2019 | SIP2004 |  | 2004 | Extn2012 |
|  | 17:06 1/7/2019 | SIP2004 |  | 2004 | Extn2012 |
|  | 17:04 1/7/2019 | SIP2004 |  | 2004 | Extn2012 |
|  | 17:03 1/7/2019 | Extn2013 |  | 2013 | Extn2012 |
|  | 17:03 1/7/2019 | SIP2004 |  | 2004 | Extn2012 |
|  | 17:01 1/7/2019 | Extn2013 |  | 2013 | Extn2012 |
|  | 17:01 1/7/2019 | SIP2004 |  | 2004 | Extn2012 |
|  | 16:53 1/7/2019 | Extn2013 |  | 2013 | Extn2012 |
|  | 16:53 1/7/2019 | SIP2004 |  | 2004 | Extn2012 |

| | Time | Name | Source | Number | Mailbox |
|---|----------------|---------|---|--------|----------|
|  | 17:10 1/7/2019 | SIP2004 |  | 2004 | Extn2012 |
|  | 17:09 1/7/2019 | SIP2004 |  | 2004 | Extn2012 |
|  | 17:08 1/7/2019 | SIP2004 |  | 2004 | Extn2012 |
|  | 17:06 1/7/2019 | SIP2004 |  | 2004 | Extn2012 |
|  | 17:04 1/7/2019 | SIP2004 |  | 2004 | Extn2012 |

To play a new message  or an existing read  click on the corresponding icon. Whilst your message is being played you can use the navigation icons to:

Click  to skip forward 2 seconds

Click  to skip backwards 2 seconds

Click  to play the next message

Click  to play the previous message

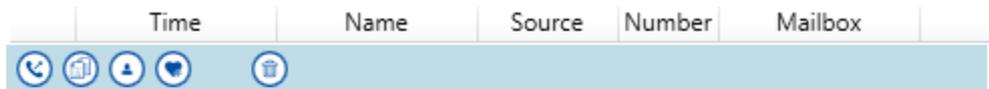
Click  to delete the message

Click  to forward the message

Click  to save the message

Voicemail forwarding must be enabled for this to work.

To call the person back who left the message, right click on the message and click the handset icon .

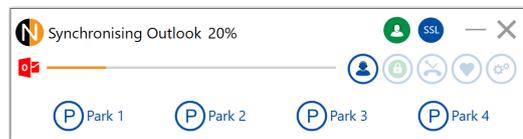


Navigate Pro Outlook Integration.

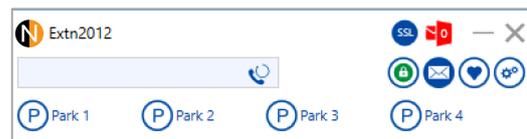
If you use Microsoft Outlook for your calendar and for storing your contacts, your User account can be configured to enable you to turn on Outlook Contact Lookup and Outlook Calendar Lookup in Navigate. Outlook Contact Lookup will enable Navigate to search within your Contacts so that you can easily and quickly dial numbers stored in your Outlook Contacts. You can also set a Dial Hot key which will enable you to dial numbers stored within a Microsoft document or within a website viewed via Internet Explorer.

The Outlook Calendar Lookup will enable Navigate to turn on Do Not Disturb if you have an appointment scheduled that is set as Busy or Out of Office, and if that appointment contains one of the five Out of Office Messages (In Meeting, At Lunch, On Holiday, Off Site and In the Office) in the body of the appointment this will set your Out of Office message at the relevant time.

If you have Outlook Integration enabled when you Navigate Pro it will connect and synchronise your Outlook contacts. Any changes made to the Outlook contacts will Automatically sync to Navigate Pro.



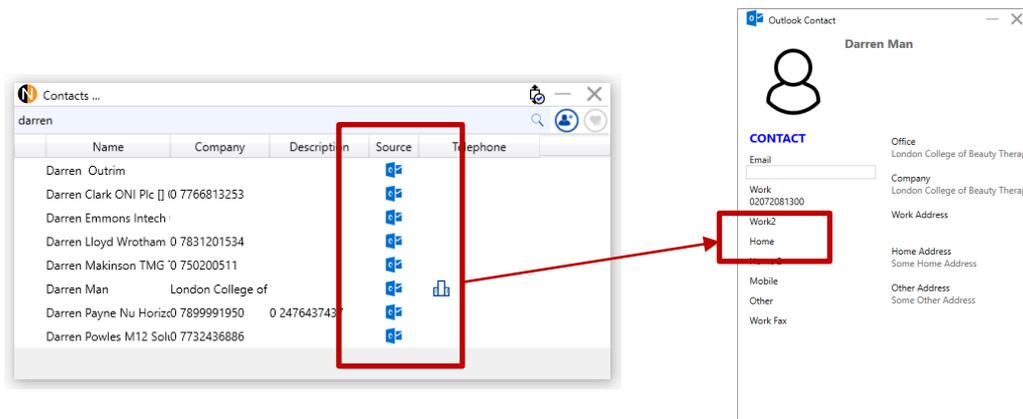
If for any reason Navigate Pro loses connection with your Outlook profile you will see a red Outlook logo on the Navigate Pro main window.



Searching Outlook contacts within Navigate Pro

When Navigate Pro is configured to search for contacts within Outlook as well, the Contacts window will show these by putting the Outlook logo  in the source column of Contact window.

Clicking on this will show the contact card for that person, if there if there are other telephone numbers for that contact you can click on them to make a call as well.



To call the selected contact click on one of the icons shown in the Telephone column.



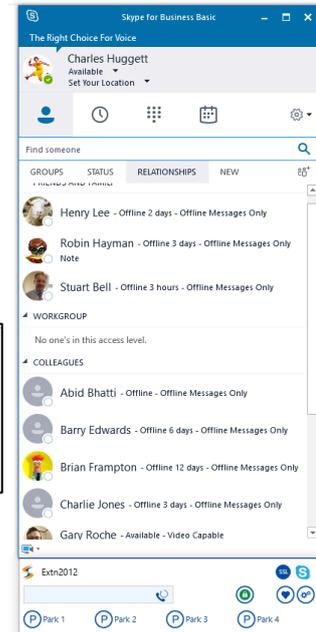
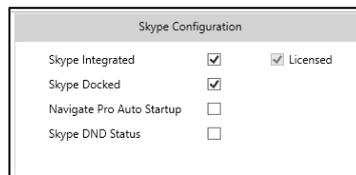
Navigate Pro Skype For Business Integration

Navigate Pro has tight integration with Skype for business, and allows you to search your SFB contacts, Make SelectVoice calls from SFB and to dock Navigate Pro to SFB so it acts like one product.

Navigate Pro docking.

Docking Navigate Pro to SFB, attaches the main window to the Bottom of the Skype window. Navigate Pro will follow any moving or re-sizing of SFB until it is undocked.

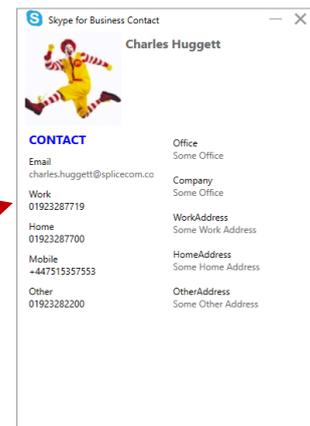
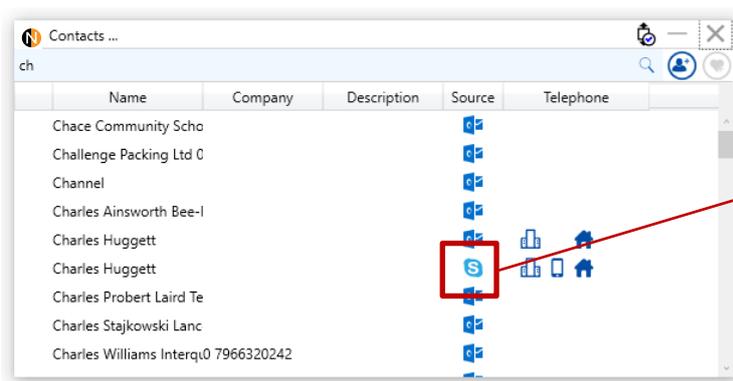
To dock Navigate Pro open settings Configuration, advanced, Skype Check to dock Navigate Pro, un-check to un-dock Navigate Pro.



Using Navigate Pro to search Skype contacts.

When Navigate pro is SFB integrated then your Skype contacts will also be searched, the Contacts window will show these by putting the SFB logo  in the source column of Contact window.

Clicking on this will show the contact card for that person, if there if there are other telephone numbers for that contact you can click on them to make a call as well.



To call the selected contact click on one of the icons shown in the Telephone column.



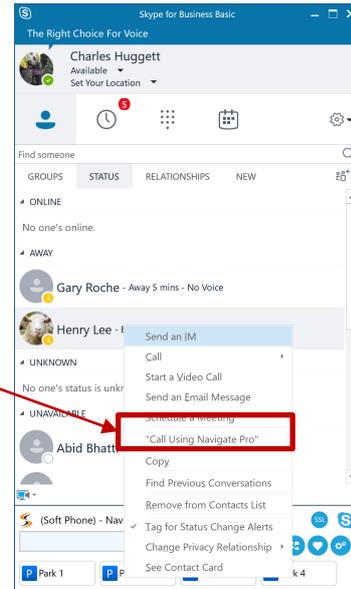
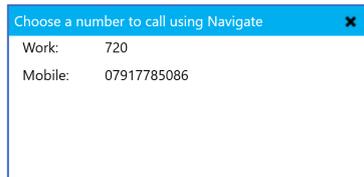
Making a call from Skype for Business

Navigate Pro integrates into Skype for Business so that by right clicking on the Skype for Business contact you get an option to call that person.

Click on the Call Using Navigate Pro option



any available numbers will be displayed in a separate window



Click on the number you wish to call and Navigate pro will initiate the call through your SelectVoice system.

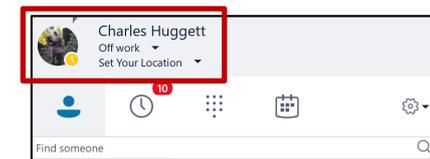
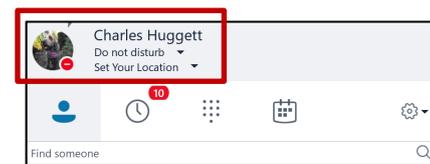
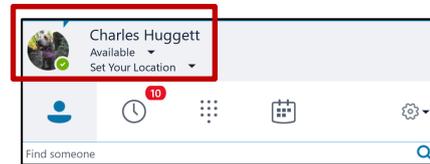
Skype for Business presence

Navigate Pro, will automatically change your Skype presence when on a call, so that you will not get a Skype call when you're on a normal call¹

When not on a Navigate Pro call SFB will show your presence as Available.

Putting yourself into Do Not Disturb also will change your Skype presence.

Setting your Out of Office will also change you Skype presence, for example setting yourself to On Holiday will change your Skype status to Off Work.



NOTE:

¹Skype DND Status

To stop Skype receiving another call whilst you are on a SelectVoice call check the Skype DND status option in Skype Configuration, otherwise Skype will make you unavailable, in this state you could receive a Skype call.

Navigate Pro Vision call centre integration

If a user has been given a Vision agent licence, then Navigate Pro will detect this and automatically enable the Vision call centre features.



Agent State

This icon shows your status within the call centre.

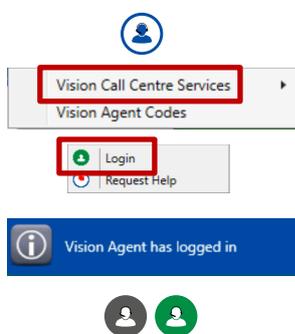
-  As an agent you are available and ready to take calls.
-  As an agent you are not available or on a call.
-  You are logged out from the call centre, no call centre calls will be presented to you, however extension, DDI and non call-centre department calls will still be presented to your phone.

Agent Actions

This icon allows you to login and logout of the call centre, raise a Help flag with your call centre supervisor or set your busy not available status.

Logging in and out of the call centre

In some circumstances a user might be given the ability to Log in and Out of the call centre, an example of this might be to allow you to assist in busy periods by taking some calls. To do this you must be logged into the call centre¹ to log into the call centre:



Click on the Agent Actions icon.

Select Vision Call Centre Service from the menu.

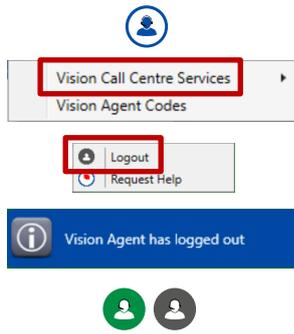
Click Login.

You will see a confirmation message.

Your agent state icon will change to green to show that you are ready to take call centre calls.

¹ Three Special speed dials are temporarily created when an agent log's in (\$agenthelp, \$agentlogout, \$login) these should not be removed.

To logout of the call centre when you have finished taking calls:



Click on the Agent Actions icon.

Select Vision Call Centre Service from the menu.

Click Logout.

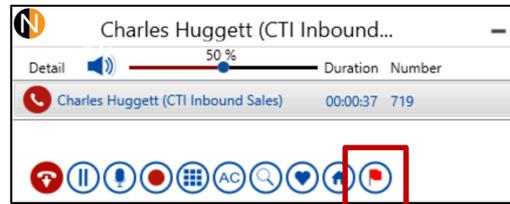
You will see a confirmation message.

Your agent state icon will change to grey to show that you are logged out from the call centre.

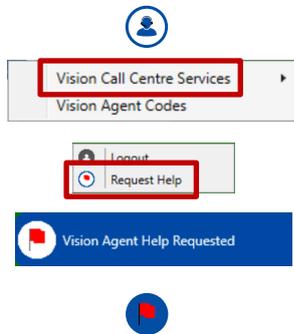
Raising a Help Flag

If for any reason you need to summon your supervisor or require assistance, Navigate Pro allows you to raise a help flag, this will be seen on the supervisor's screen. (Please refer to the Vision call centre manual for supervisor actions)

When you are on a call you will see the help icon in the call panel. Click on this to raise the help flag.



To raise a help flag when not on a call:



Click on the Agent Actions icon.

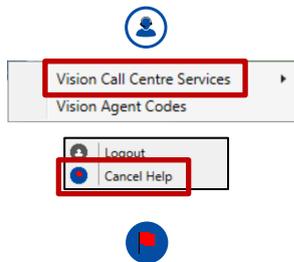
Select Vision Call Centre Service from the menu.

Click Request Help.

You will see a confirmation message.

You will also see a Help raised icon on the navigate Pro main window.

Your supervisor has the ability to clear the help flag, if you no longer require assistance, to cancel the Help Flag:



Click on the Agent Actions icon.

Select Vision Call Centre Service from the menu.

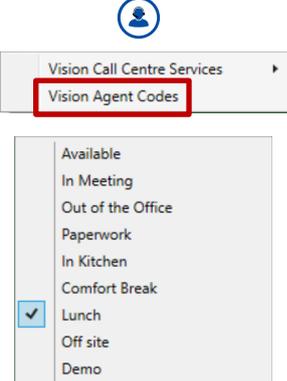
Click Cancel Help.

The help flag will be removed from the Navigate Pro main window and from the supervisor's screen.

Setting a Busy/Not Available status

Navigate Pro has the ability to set Busy Not Available codes. These codes are used to tell the supervisor that you have stopped taking calls for a specific reason EG a comfort break. Depending on how the call centre is setup there may be a few, many or no codes for you to choose. Please refer to your supervisor for help on this.

To select a Busy Not Available code:



Click on the Agent Actions icon.

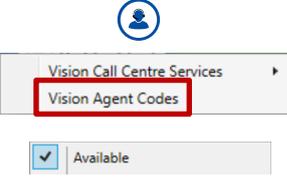
Select Vision Agent Codes

Select a reason code from the list presented.

Your agent state will change from Available to Not Available¹

The screenshot shows a user interface with a blue person icon in a circle. Below it is a dropdown menu titled 'Vision Call Centre Services' with 'Vision Agent Codes' selected and highlighted by a red box. A second dropdown menu is open, showing a list of status codes: Available, In Meeting, Out of the Office, Paperwork, In Kitchen, Comfort Break, Lunch (checked with a blue box), Off site, and Demo.

To make yourself available again:



Click on the Agent Actions icon.

Select Vision Agent Codes.

Select Available from the top of the codes list.

Your agent state will change from Available to Not Available.

The screenshot shows the same blue person icon in a circle. Below it is the 'Vision Call Centre Services' dropdown menu with 'Vision Agent Codes' selected and highlighted by a red box. Below that is a dropdown menu showing 'Available' selected with a blue checkmark.

¹ Your supervisor has the ability to override these settings.

Completion Codes and Wrap Up timers

When you have completed a call, you may be given time to complete any paperwork or screen inputting required, this is known as wrap-up time. Navigate Pro will show a wrap up timer if one has been configured.

The wrap-up timer is a countdown timer showing you how long you have before you are placed in a state to answer the next call.

With 15 Seconds to go, the wrap up progress bar will change its colour to red to show its about to complete.

If you wish to clear the timer early you can do so by clicking on the wrap-up timer cancel icon.



Extended wrap up and Completion codes

Your call centre may have a feature enabled to extend the wrap timer, these will be displayed in red with a timer icon, select this from the list on the righthand side of the wrap-up timer¹



When selected the wrap-up progress ring will also change colour to purple to show that extended wrap-up has been selected.¹



When a call is completed, you may also be given the option to select a completion code³, this is a marker that's placed against your call that explains what type of call it was e.g. an enquiry or a new customer²



¹ This will set the timer back to the value set not add the time to the existing counter value set by the system.

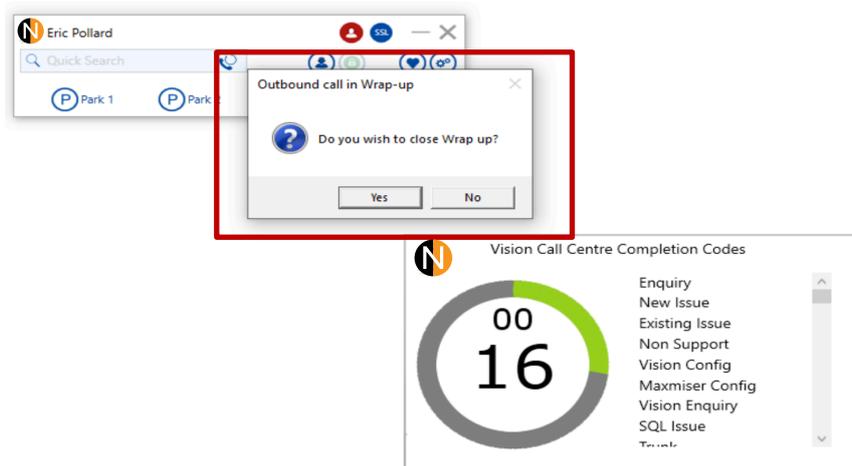
² When a completion code is selected the wrap timer is cancelled.

³ Completion codes can be grouped into logical sections for easy selection, please refer to the Vision Call centre setup and configuration guide for details on setting up completion code groups.

Picking up a parked call and making a new call whilst in wrap-up

Whilst you are in wrap-up it is possible to pick up a parked call or to make another call to another extension or an external number.

When you pick-up or make a call, you will first be prompted if you want clear wrap-up first; if you select yes then you will be able to continue picking up or making the call, selecting no will return you to wrap-up.





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