



# Accession Softphone Setup

## ENSURE YOUR COMPUTER IS COMPATIBLE

Accession Communicator for Desktop works on PCs running Windows 7, 8 and 10. It also runs on Macs that have OSX 10.7 or later.

## DOWNLOAD AND INSTALL THE APP

- Log into your commportal account by navigating to <https://webcare.avidphone.net/commportal>.
- Use your phone number and password to log into your Commportal account.
- Click on the Apps tab and on the View Apps button.
- Select the correct version of software for your deployment and install the software. Follow the on-screen instructions to install the software.

## SELECT AVID ON THE LIST OF PROVIDERS

After selecting Avid on the list of providers, you will be given the following screen with Avid's logo:

Login

Please enter your Avid Communications login details.

Phone Number

Password

Log in again using your Commportal credentials and accept the End User License Agreement.

## CHANGE THE DEFAULT PASSWORD

From the menu, select File, Change Password. Enter your default password and create a new password. Passwords must be 8 characters long and contain a letter, a number and a special character.

## CONFIGURABLE SETTINGS

In Windows, navigate to Tools, Options. In Mac, navigate to Accession Communicator, Preferences.

- In the General Tab, setup Contact syncing with computer and also define folder location for recorded calls.
- In the Calls tab, setup other Click-to-Dial number (to be used for outgoing calls), enable Call Park and set the ringtone for the softphone.
- In the Audio tab, be sure to setup your headphones to be used for audio calls and where to ring for incoming calls.
- After completing your changes, simply close out of the window to return to the softphone app.

## OTHER USEFUL SETTINGS

Return to the Tools menu and click Call Park. This will launch the Call Park window:

Call Park

Call Park Orbits

1 Orbit 1

2 Orbit 2

Also located under the Tools menu is the Call Manager used to handle follow me and other calling services.

Call Manager

Summary Forwarding Follow Me Screening

Summary of Configured Services

Calls that you receive will be processed according to the following rules.

- All calls will ring your phone.
- When busy, calls will be forwarded to voicemail.
- On no answer, calls will be forwarded to voicemail.

Finally, located under the Tools menu is the View Account menu. Using this menu, you can setup, manage and record voicemail greetings and manage notifications for when voicemails are received.

View Account

Account Calls Messages Notifications

Personal Details

Name Accession Test User

Department None

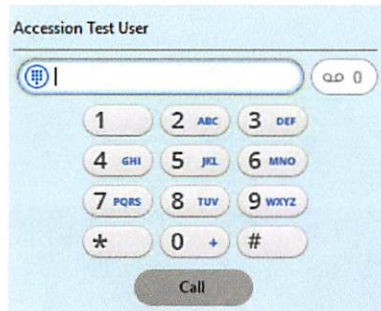
911 Location [set location](#)

This menu is also used to update your E911 address while traveling by clicking on the "set location" link.



## MAKING CALLS

Making a call is as easy as entering the number on the keypad or clicking on a contact's call button.



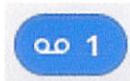
If your contact has more than one number, you can choose which number to call from the drop-down list.

## RECEIVING CALLS

When someone calls your number, you will see a pop-up window appear on your computer screen and hear a ring tone through your speakers or headset. The pop-up shows the number of the person calling you as well as the caller name info.



## VISUAL VOICEMAIL



If you have a voicemail, the Message button changes color and indicates the number of messages received. Click this button to see a list of messages received and to listen to the messages.

# Accession Softphone User Guide

## DURING THE CALL

While a call is in progress you can use the call window to:

1. Add a participant
2. Transfer the call to another number
3. Put the call on hold
4. Mute your microphone
5. Adjust the volume of the mic or speaker
6. Access the keypad
7. Record the call
8. Merge calls
9. Park the call
10. End the call

If you answer a call waiting call, your current call will automatically be placed on hold and the new call appears in a new call progress window. Switch between the two calls using the window for each one or click on the Merge calls icon to merge other callers into a single call.

