

**INTERMEDIA**

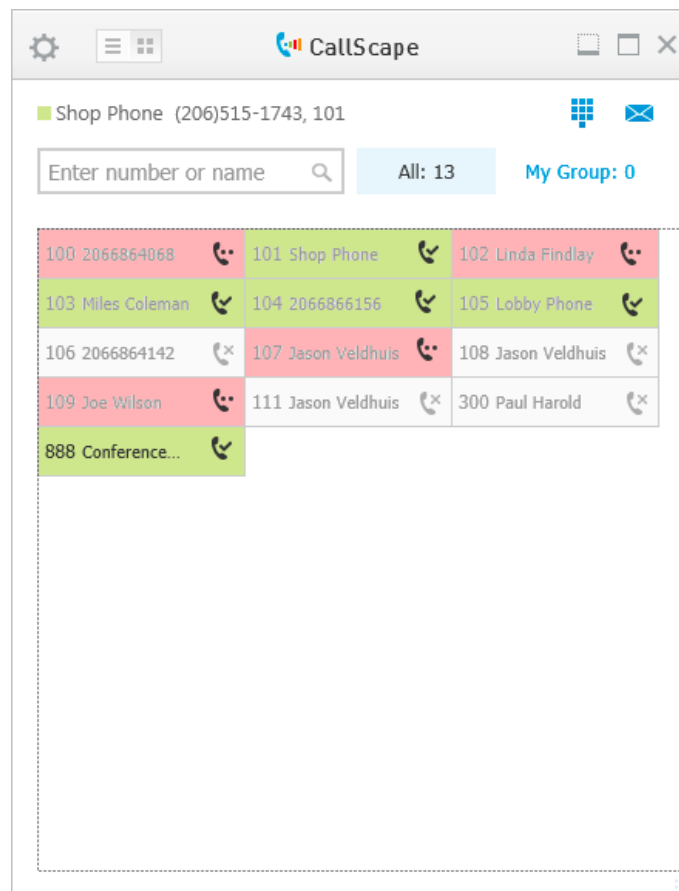
The Business Cloud™

# CallScape 3.0 User Guide

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## CallScape 3.0 User Guide



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## What is CallScape 3.0?

CallScape 3.0 is the latest version of CallScape from Intermedia with the CallScape Outlook plugin.

CallScape 3.0 augments Intermedia's HPBX system by allowing you to:

1. Place calls from CallScape by double-clicking, dragging a contact onto the dial pad, using links to phone numbers in web browser, or using the Outlook plugin to call directly from Outlook.
2. Transfer calls to other users in your company. Both attended and blind transfer are supported.
3. Monitor the status of your phone system and see who's on the phone, who's available and which phones are "offline".
4. Pick up calls to other users and get a notifications for inbound calls to monitored users.
5. Receive notification of new voicemails and log into TeleWeb to listen to your voice messages.

6. Click to call from a list of favorites. Save some of your contacts as favorites for easy and fast access, or create your own contacts.
7. Automatically launch Salesforce or eAgent (or any other page in the browser) when a call comes in.

## What is New in CallScape 3.0?

CallScape 3.0 brings many improvements over CallScape 2.0, including:

1. A fresh, new style
2. The new User View
3. Integrated Outlook plug-in
4. Integrated Outlook address book
5. Private contact import and contact lists

## Setup and Configuration

### Configuration

CallScape 3.0 is compatible with:

<b>Operating Systems</b>	Windows 10	Windows 8.1	Windows 8	Windows 7	Windows XP (x64)	Windows XP SP3 (x32)
<b>Email clients</b>	Outlook 2010			Outlook 2013		
<b>Phones (click-to-call and transfer features)</b>	Polycom SoundPoint IP Series		Polycom VVX Series		Cisco Desk Phones	

### Installation

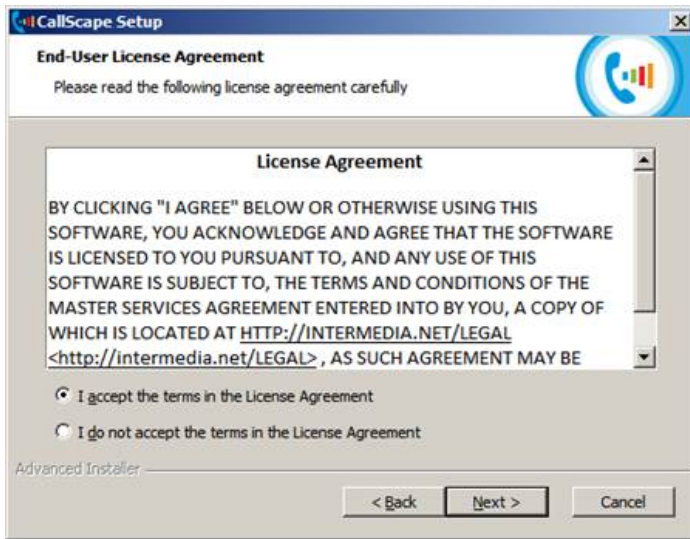
CallScape 3.0 is installed via a standalone installer package.

Download and run the CallScapeSetup.exe file. In order to install CallScape 3.0 please proceed through the following Installation Wizard screens:

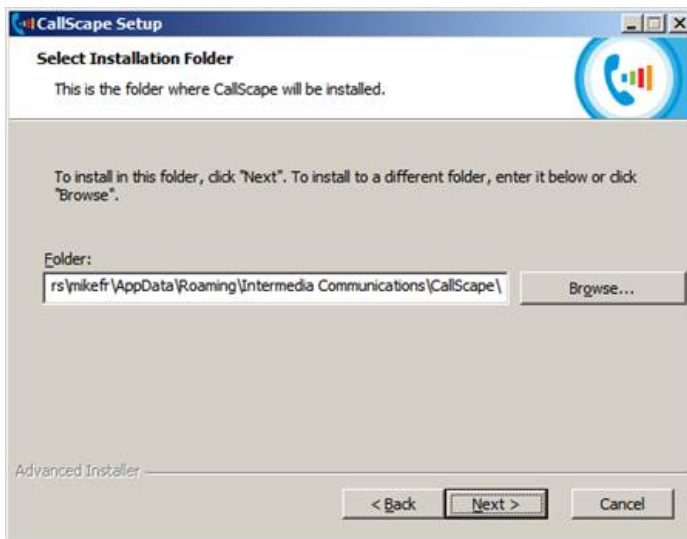
1. Click 'Next' on Welcome message screen:



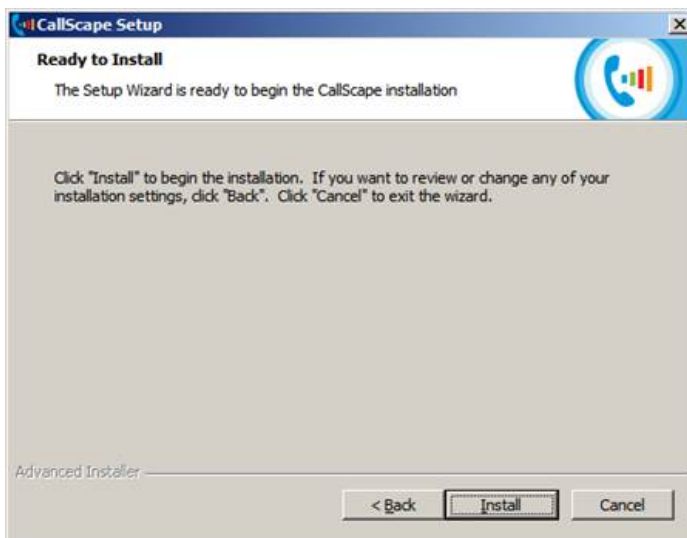
2. Accept the license agreement and click 'Next' if you agree with the license notes, otherwise click 'Cancel' or 'Back'.



3. Select the folder where CallScape 3.0 will be installed or use default and Click 'Next'.



4. To confirm installation, click the Install button. You may also click the Back button to change settings, or the Cancel button to stop installation.



5. To log in, enter your phone's 10-digit telephone number and your voicemail PIN.

## Installation Notes

After installation, three new menu items will be added to 'Start Menu':

'Enable CallScape for Outlook',

'Disable CallScape for Outlook'

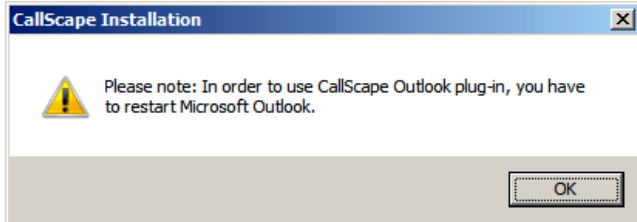
'Update CallScape'

CallScape Outlook plug-in is installed and automatically enabled during the installation of CallScape 3.0.

If you want to disable CallScape Outlook plug-in, use menu item 'Disable CallScape Outlook Plug-in' that will immediately appear under 'Start' menu after installation of CallScape 3.0.

During installation phase, a progress bar will be shown, where it's also possible to cancel the installation.

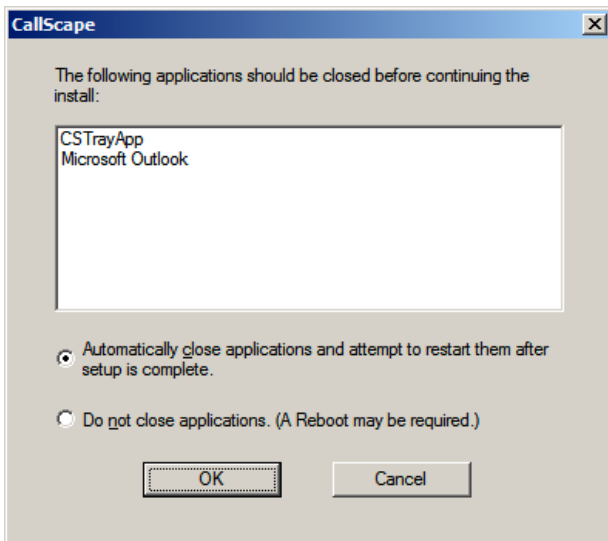
If the Outlook application is running during the installation, a message asking to restart Outlook to complete plug-in installation will be displayed. Click 'OK'.



## Uninstall

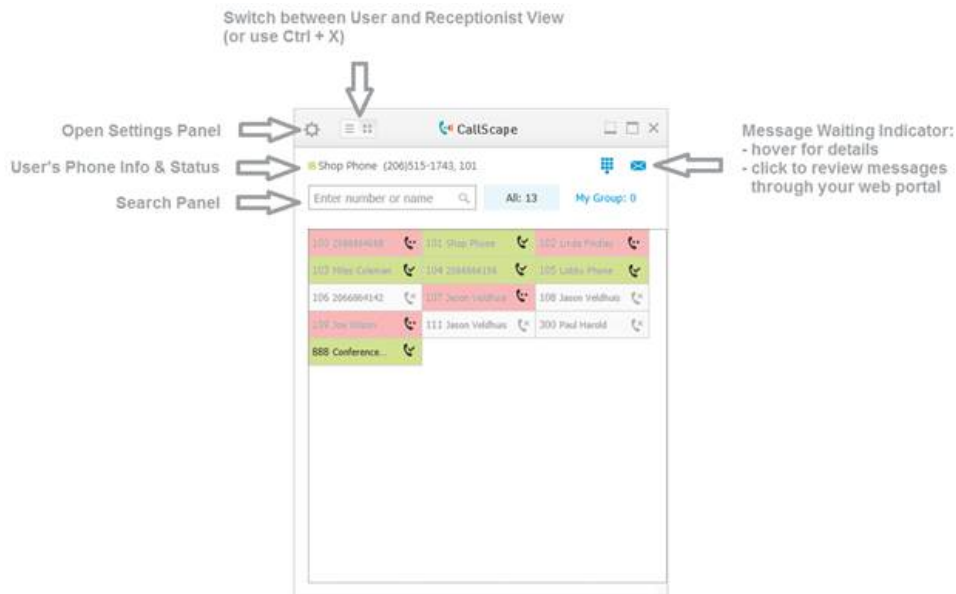
You can easily uninstall CallScape 3.0 via Control Panel => Programs and Features.

If CallScape 3.0 and/or Outlook are running, you will be notified that these applications should be closed before the uninstall process begins.



## Features and Functionality Overview

### Navigation



Navigation buttons have moved to the top of CallScape 3.0. Use the following features to find what you need.

1. The settings button, which looks like a gear, will open the Settings Panel, which will provide access to:
  1. My Account – opens the TeleWeb for your HPBX phone
  2. Dialpad – allows for the dialing of phone numbers
  3. Settings – opens the Settings pane
  4. Online Help – opens the CallScape website in a web browser
  5. About – displays the About pane
  6. Logout – logs out of the current CallScape session
2. The Search Panel allows for searching for specific names or phone numbers within your company.
3. The Message Waiting Indicator will indicate to you when you have new voicemails, and clicking the indicator button will open your TeleWeb in a web browser.

## User View

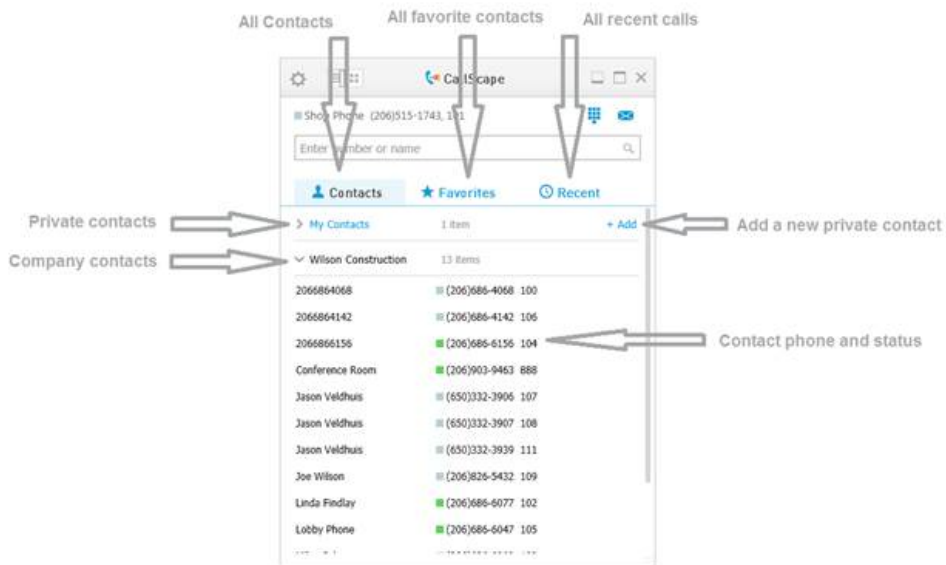
The User View is useful for you if you:

1. Are a typical employee at a desk with a computer and a phone.
2. Do not deal with large volumes of calls.
3. Want to get notification of incoming calls and determine status of your coworkers.

How to use the User View:

1. The User View displays contacts in a list.
2. The User View supports different sources:
  1. All company contacts.
  2. All Outlook contacts.
  3. All private contacts.
3. Phone's status shown on User View:
  1. Idle – green.
  2. In-use – red.

## 3. Offline - gray.



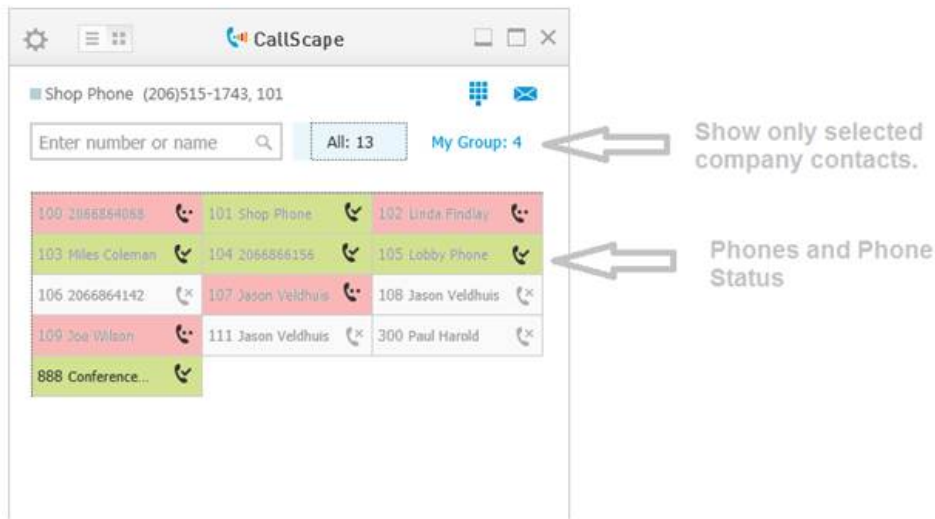
## Receptionist View

The Receptionist view is useful for you if you:

1. Are responsible for answering all incoming calls to a company.
2. Deal with a very large volume of incoming calls and efficiency and rapid transaction time on each call is very important for you.
3. Want to view the busy/idle status of all employees simultaneously without needing to do searches.

How to use the Receptionist View:

1. The Receptionist View displays contacts in a table.
2. The Receptionist View contains only HPBX phones.
3. The phone's status is shown on User View:
  1. Idle - green
  2. Ringing - blue
  3. In-use - red
  4. Offline - gray



## Dialpad

The Dialpad is available through the 'Settings' menu or by using the 'Ctrl + D' shortcut.



How to use the Dialpad:

1. To dial a number you may:

1. Type the number in via your keyboard.
2. Enter the number via the dialpad using your mouse.
3. Copy and paste a number from another application.
4. Drag and drop a number from another application.
5. Click on a Tel link in web browser or email.

2. When typing, using copy & paste, or drag & drop, the following characters only will be accepted by the Dialpad:

1. Numbers
2. '-'
3. '.'

3. When using copy & paste or drag & drop phone number, different formats are supported. E.g. the following formats are supported:

1. (123) 456 7899



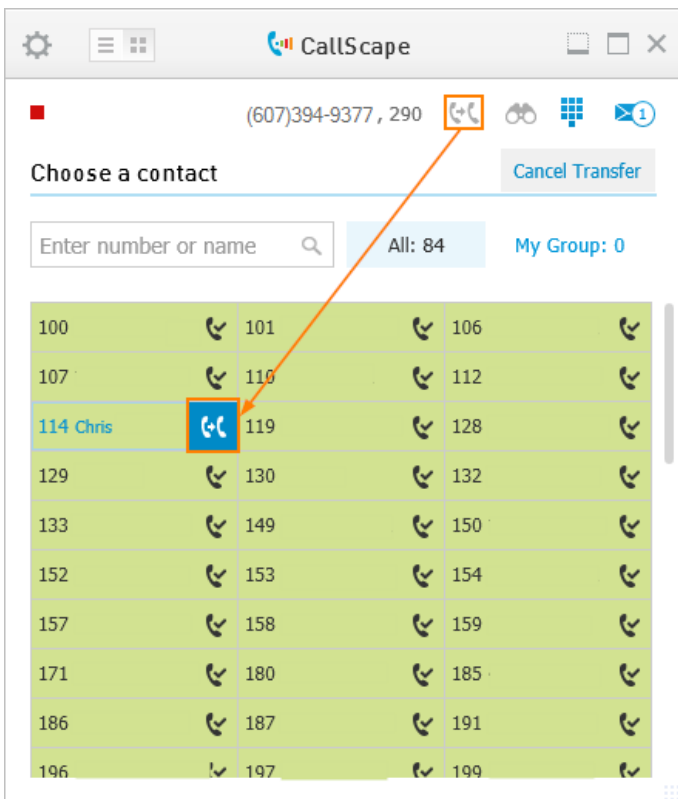
- 2. (123).456.7899
- 3. (123)-456-7899
- 4. 123-456-7899
- 5. 123 456 7899
- 6. 1234567899

## Call Transfer

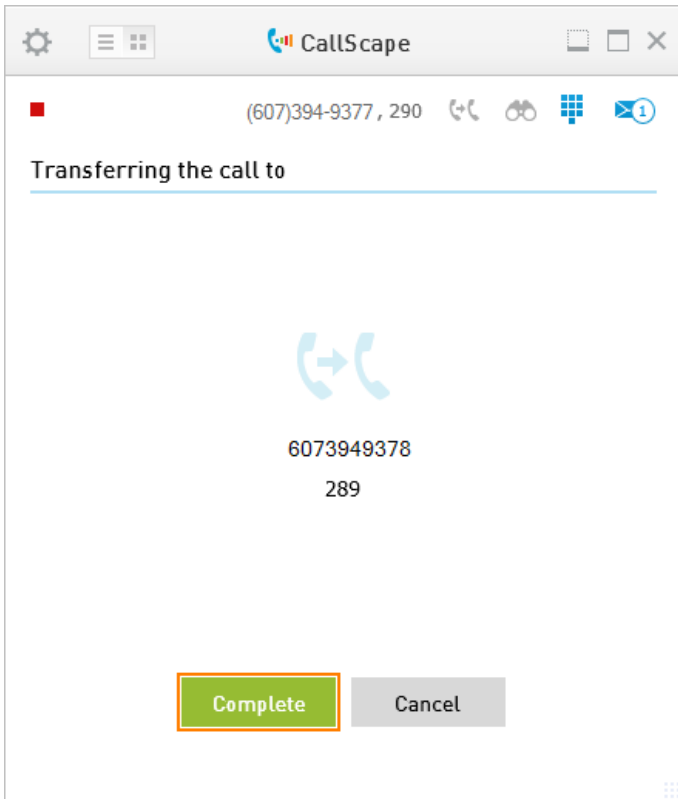
CallScape offers two easy to use methods to transfer in-progress calls. Note that Call Transfer feature is only supported with Polycom and Cisco desk phones.

### Method 1

Press **Transfer** button on top of CallScape window, search for the contact you wish to transfer this call to and press **Transfer** button next to the contact's name.

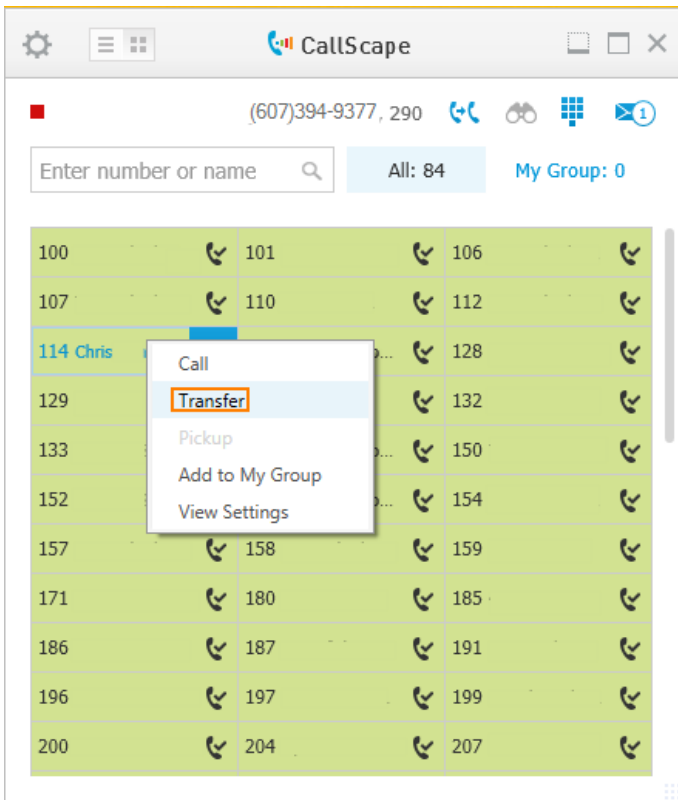


Wait for the extension called to answer and announce the call before pressing **Complete** button. Alternatively, press **Complete** button immediately to complete a cold transfer.



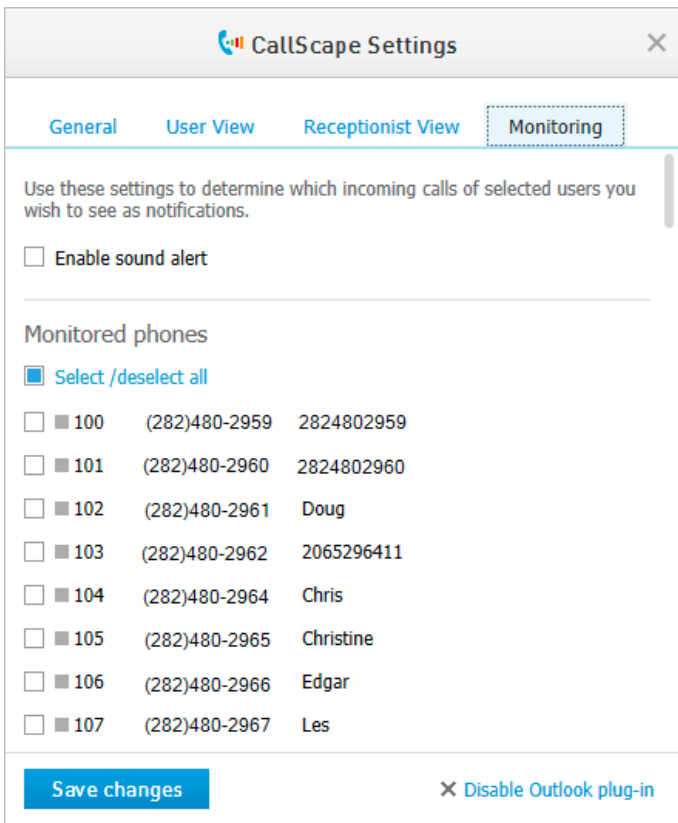
### Method 2

Right-click the name of the user you want to transfer the call to and press **Transfer** button. Follow the instructions above to complete a warm or a cold transfer

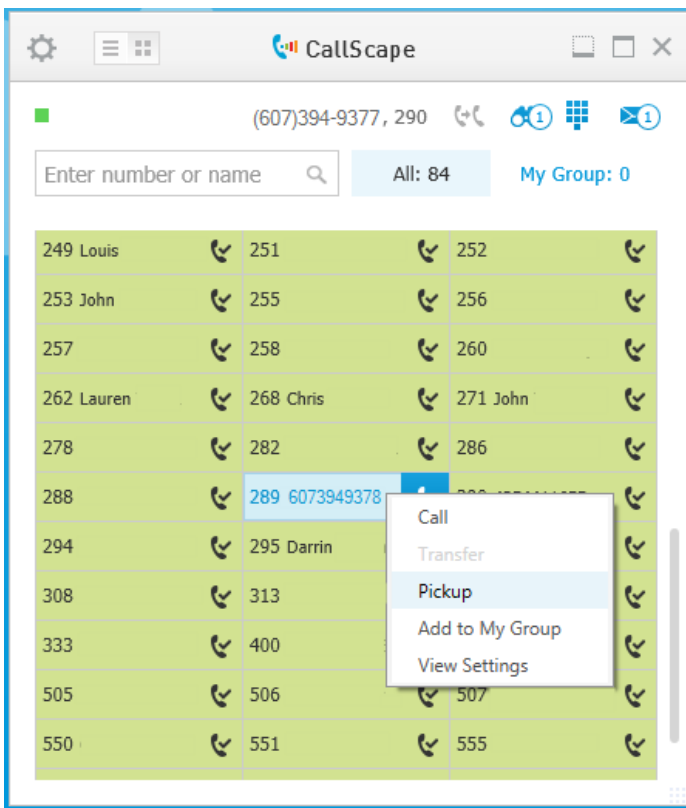


### Call Monitoring and Pickup

To choose the extensions you wish to monitor, go to *Settings > Monitoring*. You can receive a sound alert when there's an incoming call to a monitored extension.



To pickup a call that's ringing a monitored extension, right-click this extension in Receptionist View and select **Pickup**.



## Settings

Settings are available through the 'Settings' menu item or via the 'Ctrl + S' shortcut.

You are able to configure general application settings or customize user or receptionist view.

## General Settings

The screenshot shows the 'CallScape Settings' dialog box with the 'General' tab selected. The dialog has a title bar with the CallScape logo and a close button. Below the title bar are four tabs: 'General', 'User View', 'Receptionist View', and 'Monitoring'. The 'General' tab is active and contains the following sections:

- Alerts & Sounds**
  - Enable alert displays
  - Enable sounds
  - Screen Pop**  
On incoming call, open a browser to view contact
  - URL:  ?
  - Screen Pop automatically for all incoming calls ?
- View Attributes**
  - Always on top  Dialpad always on top
  - Use Ctrl+Shift+S to open CallScape
- Permissions**
  - Start CallScape when I start Windows
  - Automatic Login Enable click-to-call from websites:
  - Enable Logging ? **Set enable**

At the bottom of the dialog, there is a blue 'Save changes' button and a link 'X Disable Outlook plug-in'.

The General settings tab allows you to modify the behavior of CallScape 3.0.

### Alerts & Sounds

Enable alert displays - this option enables or disables CallScape's ability to show you who is calling in the lower right corner of your screen.

Enable sounds - this option enables or disables CallScape sounds

Screen Pop - this allows you to enter a URL to automatically open up within your Internet browser when certain incoming calls are received.

Screen Pop automatically for all incoming calls - this option forces the screen pop on any inbound call.

### View Attributes

Always on top - causes CallScape to always display on top of your other programs

Dialpad always on top - Causes the Dialpad to always display on top of your other programs.

Use Ctrl+Shift+S to open CallScape - pressing Ctrl+Shift+S will bring CallScape windows on top if this option is enabled

### Permissions

Start CallScape when I start Windows - this will automatically start CallScape when you log into Windows.

Automatic Login - this will automatically sign you into CallScape, if you have clicked the 'Remember me' box on the login screen.

Enable Logging - this option enables logging to assist with troubleshooting issues.

Enable Click-to-Call from websites - enables dialing using Tel protocol

## User View Settings

The User View settings allow you to modify the behavior of the User View.

### Visible contact groups

**My Contacts** - makes the 'My Contacts' section visible in the User View.

**Your Company Name** - this will display the name of your HPBX account. This toggle will turn on and off your company contacts from displaying in the User view.

**Hide unregistered company phones** - this option will remove phones that are not functioning or plugged in from the User View.

**Hides contacts without name** - this option will remove phones from the User View that have only a phone number and/or extension number, with no name.

**Hide contacts without number** - this option will remove phones from the User View that have no phone number.

**Sort contacts in group by** - allows the selection of sort criteria within each contact group. Available options are to sort by:

Name  
Number

**Import contacts from plain comma-separated file** - CallScape allows you to import contacts within a .CSV file in the event you wish to import contacts from another application. Formatting guidelines are available in a tooltip if you hover over the Import button, but for convenience the requirements are:

Import file must be .CSV  
One line per contact within the file  
Each line should be formatted as:

First Name  
Last Name  
Phone Number

Duplicates and invalid formatting will be rejected  
E.G. John, Doe, 2065551212

### Additional Contact Groups

Additional groups may show up in the 'Visible contact groups' section in the User View settings. This will occur after you have installed the Outlook plug-in and your outlook contacts have synchronized with CallScape. CallScape will acquire the following from Outlook:

Outlook Contacts (will display as 'Contacts')

Contacts associated with any of your Outlook mailboxes

Suggested Contacts

Favorites

Sort by name or Add to top - this option allows you to determine the sort of the Favorites section, if you have designated contacts as favorites.

Clear favorites - this button allows you to delete all contacts marked as favorites from the Favorites section.

Recent Calls

Keep history - this option allows you to select for how long you wish CallScape to keep recent call history which shows up on the Recent section in the User View. Options are:

Max One Day

Max One Week

Max Two Weeks

Max One Month

## Receptionist View Settings

The screenshot shows the 'CallScape Settings' dialog box with the 'Receptionist View' tab selected. The dialog has three tabs: 'General', 'User View', and 'Receptionist View'. Below the tabs, there is a heading: 'Use these settings to determine which phones you wish to view on tiled tab'. There are two dropdown menus: 'Sort Receptionist View by' set to 'Extension' and 'Tiles Size' set to 'Small'. A checkbox labeled 'Hide unregistered company phones' is checked. Below this is a section titled 'My Group' with a 'Select /deselect all' button. A list of phone numbers and names follows, each with an unchecked checkbox: 100 (206)686-1234 Mike Henderson, 101 (206)686-3570 Melissa Davis, 102 (206)686-1590 Steven Doney, 103 (206)529-8520 Joe Pruitt, 104 (206)529-7913 Karen Plyler, 105 (206)529-3197 Krystal Morrow, and 106 (206)529-5511 Angela Waters. At the bottom, there are two buttons: 'Save changes' and 'X Disable Outlook plug-in'.

The Receptionist View settings section allows you to change the behavior of the Receptionist View.

Sort Receptionist View by - this drop down list allows you to select how you wish the Receptionist View to sort its tiles. Available options are:

Extension

Number

First Name

Last Name

Status

Hide unregistered company phones - this option allows you to remove inoperable phones from the Receptionist View.

Tile Size - this option allows you to increase or decrease the size of the tiles, for ease of reading, in the Receptionist View.

## My Group

By selecting or deselecting phones in this section, you may construct the 'My Group' section, which is a custom set of phones within your company that you wish to monitor.

## Monitoring Settings

The screenshot shows the 'CallScape Settings' dialog box with the 'Monitoring' tab selected. The dialog has a title bar with the CallScape logo and a close button. Below the title bar are four tabs: 'General', 'User View', 'Receptionist View', and 'Monitoring'. The 'Monitoring' tab is active and contains the following content:

Use these settings to determine which incoming calls of selected users you wish to see as notifications.

Enable sound alert

---

Monitored phones

Select /deselect all

<input type="checkbox"/>	■ 100	(282)480-2959	2824802959
<input type="checkbox"/>	■ 101	(282)480-2960	2824802960
<input type="checkbox"/>	■ 102	(282)480-2961	Doug
<input type="checkbox"/>	■ 103	(282)480-2962	2065296411
<input type="checkbox"/>	■ 104	(282)480-2964	Chris
<input type="checkbox"/>	■ 105	(282)480-2965	Christine
<input type="checkbox"/>	■ 106	(282)480-2966	Edgar
<input type="checkbox"/>	■ 107	(282)480-2967	Les

At the bottom of the dialog, there is a blue 'Save changes' button and a link that says 'X Disable Outlook plug-in'.

The Monitoring Settings allows you to Pickup calls ringing on a monitored phone. Additionally, you can choose to receive a sound alert whenever there's an incoming call to a monitored phone.

## Integrating with Salesforce or eAgent

When you receive an incoming call from outside your company, you can configure CallScape to either automatically or upon request open (pop) a browser to a pre-defined URL. You can configure the calling party's number as a parameter to the URL.

This feature is very useful on conjunction with the third party web based contact services, such as eAgent, Salesforce, and others. When you receive an incoming call, CallScape will open a browser window to search the third party contacts database.

### Salesforce

For Salesforce, you must be logged into your Salesforce account and allow the Screen Pop to operate with CallScape. You will need to use an appropriate Salesforce search string to the CallScape Screen Pop URL. Substitute %callers\_number% in the position where the phone number should be placed in the search string.

Salesforce example:

[https://na14.salesforce.com/\\_ui/search/ui/UnifiedSearchResults?searchType=2&str=%callers\\_number%](https://na14.salesforce.com/_ui/search/ui/UnifiedSearchResults?searchType=2&str=%callers_number%)

### eAgent

For eAgent, you will need to obtain the Screen Pop URL corresponding to your eAgent account. This URL can be accessed by logging into eAgent at [www.eagent.net](http://www.eagent.net) with your eAgent credentials.

Currently the **eAgent** portal does not display Intermedia in the list of VoIP providers. However you can configure CallScape to work with eAgent as follows:

1. Login to your eAgent Portal

1. Click Setup, and then click VoIP Integration;
  2. Select 'Lightspeed Voice' from the list;
  3. Copy the URL authentication string that is provided in the box, it will look something like this:  
<https://app.ebridge.com/eagent/login.aspx?id=xxx==&phone=>
2. Open CallScape
1. Navigate to the General Settings;
  2. Paste the URL authentication string you copied above into the CallScape Screen Pop URL text box
  3. Add the following to the end of the text string in the CallScape URL text box: %callers\_number%
  4. Click 'Save changes'