PhoneFusion One™ Control Center Manual

I. Introduction

PhoneFusion One's Control Center (CC) software is an application that is used on the computer through your computer's Internet connection. [You MUST have an Internet connection in order for CC to work.] When you have the software set up appropriately, controlling your calls with PhoneFusion One is made even easier. **Note that Control Center is an optional product that you may not have. Please contact Customer Support if you would like to add Control Center to your current service.**

When a call comes in on your PhoneFusion One number, you will see the Caller ID and hear the "Who's Calling" recording on your computer BEFORE your phone even rings. You have the same options of accepting and rejecting calls or sending callers to voicemail. (Our Instant Message feature is not available through Control Center.)

Control Center brings your call control in front of you, instead of only hearing things by phone. If you're someone who sits at a computer all day, CC is a great application for you. You can SEE who is calling, listen to the "Who's Calling" recording on your computer and track your calls through your Call History. However, just because the application is installed, that doesn't mean it is always working. CC must be running (the icon in your toolbar needs to be green) in order to keep track of calls. If your Internet connection goes down, CC will not track your calls because it will not be running.

II. Installation

System Requirements: Windows

- Intel® Pentium® III or equivalent processor
- Microsoft® Windows® Vista; Windows XP Professional, Home Edition, or Tablet PC Edition with Service Pack 2; MS Windows 2000 with Service Pack 4
- 1024 Meg or Higher
- Microsoft Internet Explorer 6.0 or 7.0, Firefox 1.5 or 2.0, Mozilla 1.7, AOL 9

Downloading the application
Click on the Control Center link provided within your online account or at
www.phonefusionone.com/downloads/php

You will be provided a ZIP file. Unzip this file.

A new window will - open or extract the PFCCSetup.exe file to your computer.

Note: You may get a security warning letting you that exe files are potentially un-safe. The file we provide you directly from our PhoenFusion.com site is safe.

Confirm you do want to open the file.

PhoneFusion | P.O. Box 23950 Oakland Park, FL 33307 | 954-607-4400 | www.phonefusion.com
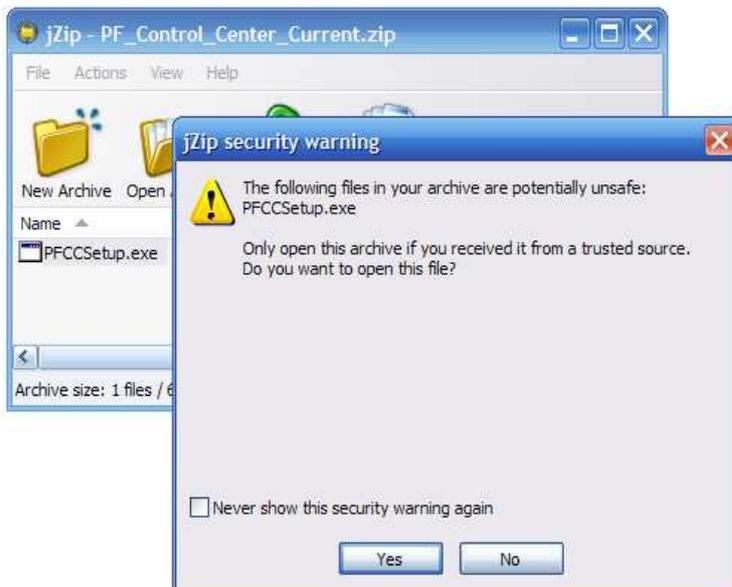
Welcome to PhoneFusion Control Center Setup Wizard
Click on, 'Next'.

**Important notes about installation of this version:**

- Make sure that the PhoneFusion CC application is not running or it will cause problems during installation.
- This version may be installed in a folder that is different than your existing install. The new installer does not know about previous installations.
-It is HIGHLY recommended that you install this application in the default install folder.
- If you have a version that is not in the folder that this version will be installed in then you will have to copy files from the previous install if you want to retain call logs and configuration.
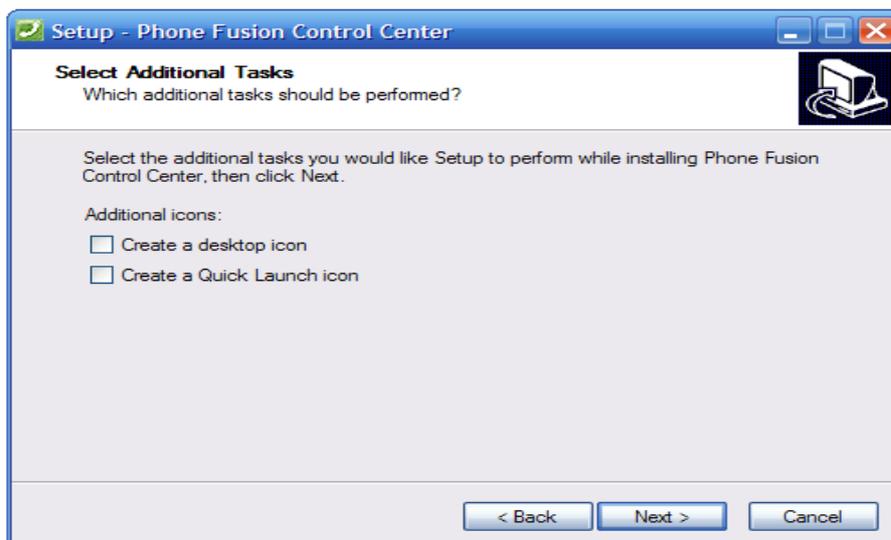
Click on, 'Next'.

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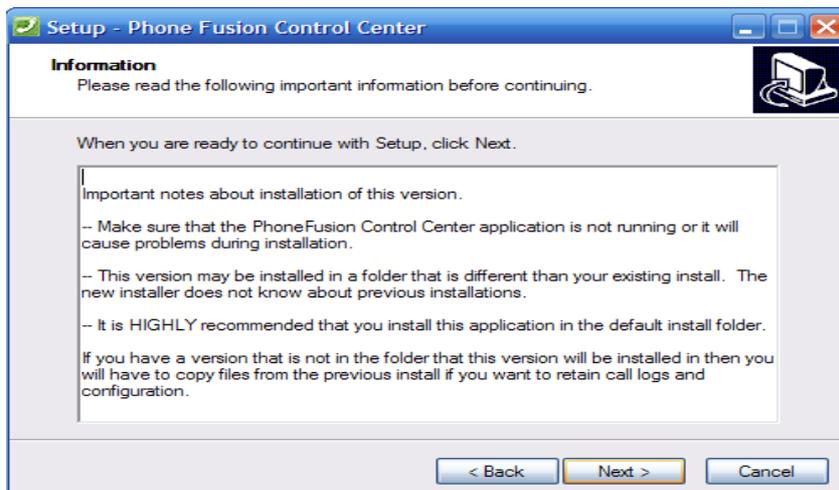
Select Start Menu Folder

To continue, click 'Next'. If you would like to select a different folder, click 'Browse'.
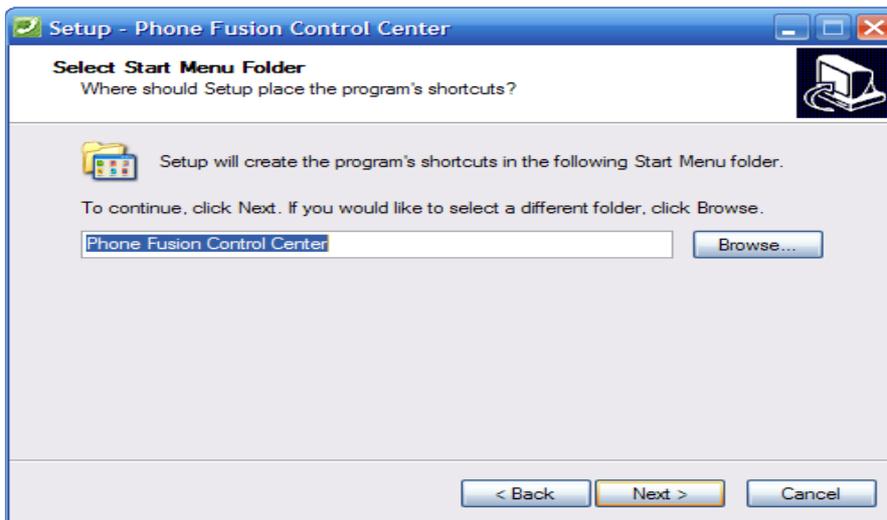
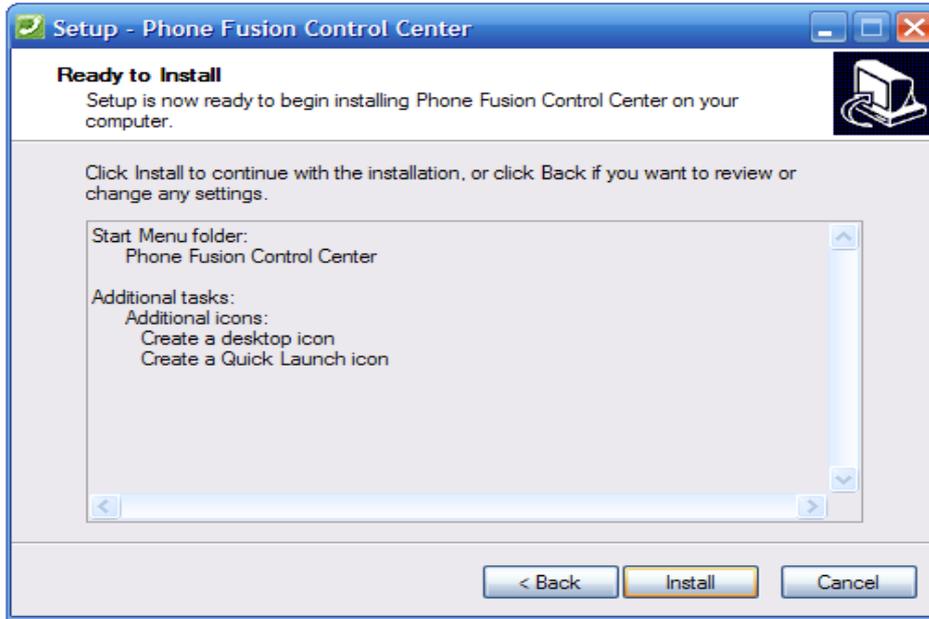**Select Additional Tasks**

Which additional tasks should be performed?

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Ready to Install

Click 'Install' to continue, or click 'Back' if you want to review or change any settings.

Installation is now complete.

If you are going to download PhoneFusion's **Outbound Fax** or **PC Phone** application; DO NOT launch PhoneFusion's Control Center. Otherwise; click on 'Finish'.

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III. Control Center Setup

Once you have downloaded Control Center onto your computer you will see a gray phone at the bottom right-hand corner of your toolbar.

This is the Control Center application.

The gray color indicates the application is not actively connected.

Right click on the gray phone. A small window will open with the **Control Center Menu**.

You will need to set up your phone number in order to get Control Center to start working, so you must configure CC for your PhoneFusion One number. Select 'Configure' from the tray icon menu. If your account has not already been configured, the configuration dialog box will automatically come up. If you close the box you can get back to it by selecting 'Configure' from the tray icon menu.

Configure

The screen below will open.

Click on the 'Add Account' button.

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Another window will open on top of the first one asking you to enter an Account Name.

Each time this number connects to PhoneFusion One's Control Center application, the account name will be displayed, so choose something you recognize. Then click OK.

The next step in configuring CC for your PhoneFusion One number is adding your number and password.

You will also choose to turn specific call options on or off. You can change these options at anytime. Below you will see all of the options and an explanation of what each one means:
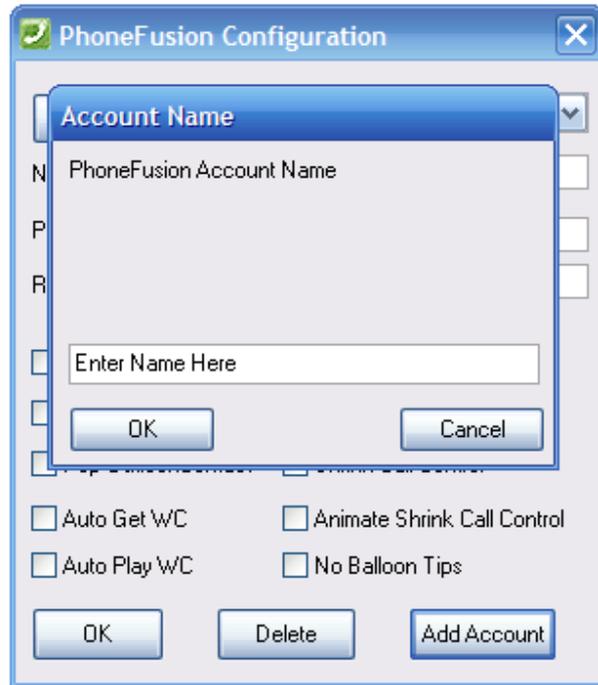
Number: Enter the PhoneFusion One phone number you are adding to the Control Center application.

 Password: Enter your phone password.

Ring: This configures the sound that your computer will play when new calls come in on this number. You can browse your computer for a file to play or use the default PhoneFusion One ring. (You can configure rings by contact or Caller ID using the Call History list which will override these settings.)

Silent: Do not play a sound on this computer when calls are received for THIS ACCOUNT. There is a global silent setting on the pop-up menu that applies to all accounts.

No Box Status: Don't display mailbox information for this number inside the taskbar tip.

Pop Microsoft® Outlook® Contact: When you receive a phone call, do you want it to show up as a Contact from your Microsoft® Outlook® contact folder or only a Balloon Tip on the minimized desktop taskbar? If the contact doesn't exist a balloon tip will open.

Auto Get WC: This sets CONTROL CENTER to automatically 'Get' the audio that a caller left in response to the 'who may I say is calling' question (if the caller left a recording that is more than a few seconds). Note that Auto Get WC does not play the recording - it takes the 'who's calling' recording to use in the future when reviewing your call history or to set the recording as a ringtone for the caller (See Call History). It is saved on your computer and automatically deleted when the call is deleted from call history.

Auto Play WC: This setting will play the 'who's calling' audio that is downloaded to your PC by the previous setting (Auto Get WC), for each call on this account. Note that this feature requires a high speed data connection to function well.

Call Control: Enables the Call Control box on inbound and outbound calls for this account. You will see a pop-up Call Control Box when calls are received.

Transparent Call Control: If you choose this setting, you will allow Control Center boxes to fade to a preset level (after a delay) to keep them out of the way but available if you need them. The level of transparency is set via the tray menu.

Shrink Call Control: Allow the Call Control Box to shrink (after delay).

Animate Shrink Call Control: Animate the shrinking of the Call Control Box (after delay).

No Balloon Tips: Don't show any tips in a small balloon above the Control Center icon.

To select any of the available options, mark the box next to each feature you would like to use.

When you are done, click OK.

If you want to add another account, click on 'Add Account' and configure the next PhoneFusion One phone number you want to add.

NOTE: You can add up to 10 phone numbers to the Control Center application. Make sure that you click on the 'Add Account' button and don't simply make changes to an existing account. When you have several phone numbers in Control Center, they will ALL be active at the same time.
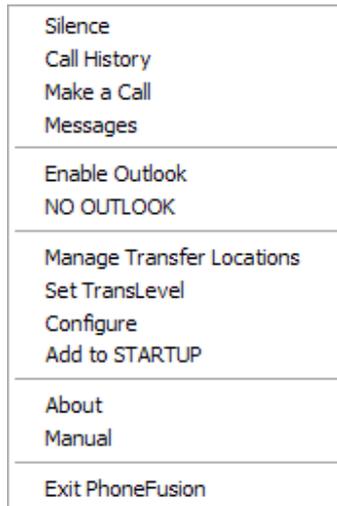
Once you are done, PhoneFusion One's Control Center application will attempt to verify the information provided. If the information provided is valid, the gray telephone icon will change to green, which indicates it has successfully connected.

 The green icon shows you that the Control Center application is running.

IIII. Control Center Menu Options

Once your account is set up and configured, you should familiarize yourself with the Control Center menu and its options. When you right click on the green phone icon in the corner of your toolbar, your CC menu will open, which looks like the one below:

Silence
Call History
Make a Call
Messages

Enable Outlook
NO OUTLOOK

Manage Transfer Locations
Set TransLevel
Configure
Add to STARTUP

About
Manual

Exit PhoneFusion

Silence: To silence all audio (rings and Who's Calling), select 'Silence' from this menu. If you have multiple accounts and you select to silence the audio, the audio will be silenced for ALL accounts.

If your Control Center software has been silenced, the icon will look like the one below.

11:39 AM

Call History: Click on 'Call History' to see your call history.

Make a Call: Click on 'Make a Call' to initiate a call from your desktop PC.

Messages: this link allows you to see all messages your PhoneFusion One # has. You can listen to voicemail or call recordings and view faxes directly from this link. This message link also allows you to delete, undelete and empty your online mailbox without having to log into your account online. It also displays your storage amount used.

Enable/Disable Outlook: You can opt to show or NOT show your Microsoft® Outlook® information for the contact when the person calls (this shows up when you have clicked "Pop Outlook Contact" in setting up your account).

NO OUTLOOK/Sync Contacts: If you have not opted to sync Microsoft® Outlook® with the CC application; you will see NO OUTLOOK. If you have Microsoft® Outlook® synced with CC; with a click of your mouse on 'Sync Contacts,' you can "sync" the contacts into Control Center with the contacts that are already in Microsoft® Outlook® on your computer. NOTE: When the CC application starts, it connects to Microsoft® Outlook® and downloads contacts into a memory cache to make lookups faster. CC periodically syncs itself, but if you make updates to Microsoft® Outlook® and want to make sure they are in CC, select Sync Contacts on the desktop tray menu.

Manage Transfer Locations: You can program up to 5 predefined phone numbers (similar to speed dial numbers) you would like to transfer calls to. Select the Manage Transfer Locations option from the Control Center Menu to add predefined phone numbers where you will want to transfer calls.

Set TransLevel: If selected, the call control box is slightly transparent so that you can see the other things on your computer screen when a call is coming in.

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Configure: If you want to add another account or change settings for an existing account, click on 'Configure.' NOTE: When you select configure, CC disconnects from PhoneFusion One servers while you make changes. It does not stop your current calls but it can no longer control any new or existing calls until you are finished configuring CC.
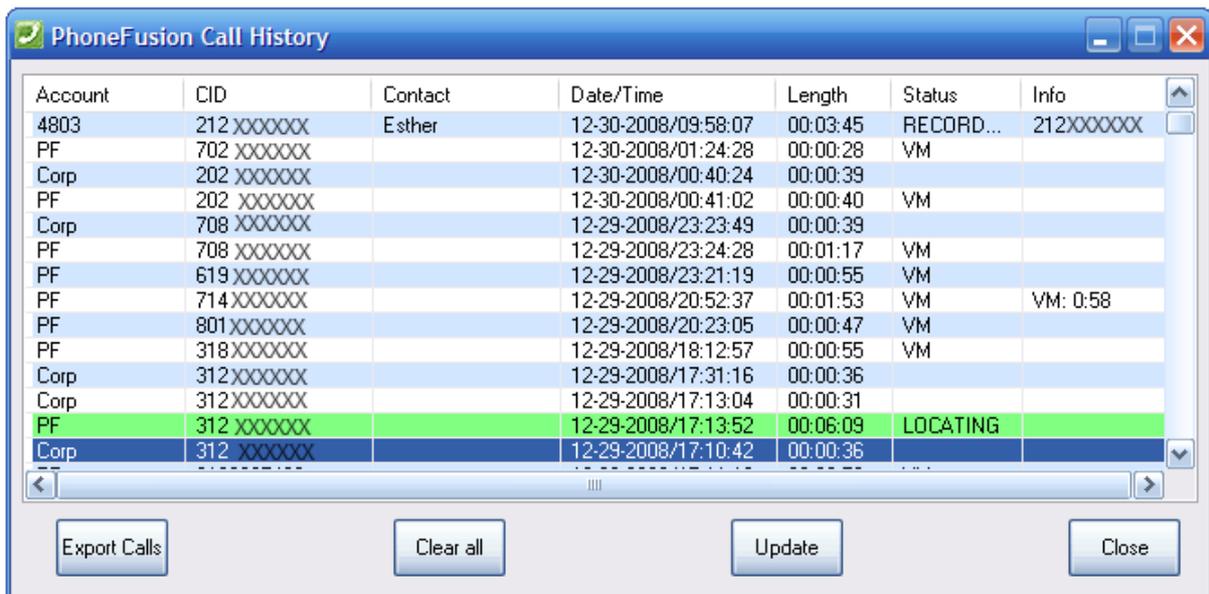
Add to STARTUP: By clicking on 'Add to STARTUP,' Control Center will automatically turn on when you start your computer.

About: Click on 'About' to see which version of Control Center you are running.

Manual: This option is a shortcut to the manual online. If you would like to take a look at this manual, click here.

Exit PhoneFusion: If you want to close and exit Control Center. You can use this link.

1. Call History Menu Options

Call History provides you with detailed information about the calls you have made from the Control Center application and the calls received while this application was running. Remember that if your Internet connection is down or you don't have CC running (the icon in the lower right-hand corner of your screen is gray), any calls made or received during that time will not appear in your Call History box.

The following are the headings in the Call History box:

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Account – Phone numbers assigned 'Account' name where a call was received or made.

CID – The caller's phone number or your PhoneFusion One phone number.

Contact – Name of the contact from your Microsoft® Outlook® program or Caller ID name collected.

Date/Time – Date and Time of the call made or received.

Length – Total length of the call.

Status – Status of a call i.e.; 'Locating' [means no one accepted the call and no voicemail was left], VM [voicemail], Inbound Fax, Outbound Fax, 'Connected' [means someone did 'accept' the call].

Info – This tells you if the call was a voicemail message [with the length of the message], a fax received [and number of pages] or the phone number that accepted the call.

Export Calls: Click on 'Export Calls' and the calls shown on this screen will be copied to a clipboard.

Clear: Click on 'Clear' to clear the log of all calls presented in the call history screen. You will be prompted to confirm you want to clear all the calls in Call History.

Update: Click on 'Update' and PhoneFusion One's Control Center application will sync the Call History with your Microsoft® Outlook® software to display any additional contact information that may be available.

Clear One Call Only: If you highlight a single call, you can delete just that call.

**Additional Call History Options:**

Add Contact
Add the caller's contact information to be saved in Microsoft® Outlook®. A box will pop up from Outlook for you to add the contact information.

Set CID Ring
Set a ring tone to that specific phone number collected from Caller ID.

Callback
Create a call back using this menu. Click on 'Callback' and provide the phone number where PhoneFusion One will call you so it can call the number you selected to call.
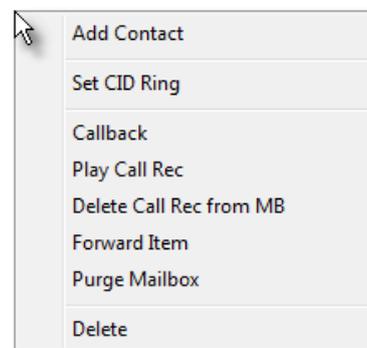
Play Call Recording
When calls are recorded and the status shows as 'Recorded', you can click on the call history and listen to your call recordings right from the call history screen without logging in. [Note: You will only have recordings if your account ALREADY has Call Recording activated.]

Delete Call Recording from Mailbox
Manage your mailbox right from your call history screen. You can choose to delete call recordings from your inbox. These messages will be marked to be deleted. Once these recordings are marked to be deleted, you will no longer be able to listen to them.

Play Message
When you receive a voicemail message and the status shows "Voicemail," you can click on the call history line item and listen to your voicemail right from the call history screen, without logging in.

Delete Message from Mailbox
Manage your mailbox right from your call history screen. You can choose to delete voicemail messages from your inbox. These messages will be marked to be deleted. Once these recordings are marked to be deleted, you will no longer be able to listen to them.

View Fax
If you are looking at a fax item in your call history, instead of Play Call Recording, you have the option to view the fax that has come in right from your call history screen, without needing to log in to your account.

Delete Fax from Mailbox
Manage your mailbox right from your call history screen. You can choose to delete faxes from your inbox. These faxes will be marked to be deleted. Once these faxes are marked to be deleted, you will no longer be able to listen to them.

Purge Mailbox
Once messages are marked to be deleted, you can choose to purge the mailbox and permanently delete all messages that are marked to be deleted.

Delete
Delete the call from your call logs.

Close
Click on this button to close the Call History screen.

2. Make a Call

To make a call using your PhoneFusion One phone number, click on 'Make a Call' when you right click on the phone icon in your toolbar. The calls made will display your PhoneFusion One phone number. This

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feature sends a message to PhoneFusion One's equipment with a request to connect the phone numbers you provided. When you select 'Make a Call,' the Make a Call Box will open.

- If you have more than one PhoneFusion One phone number programmed, select the Account you want to use to make the call from the drop-down menu.

- Enter the phone number you would like to call in the 'To' section.

- Enter the phone number where PhoneFusion One will call you in the 'My Location' section in order to connect the call. **Make sure you enter a destination number and NOT your PhoneFusion One phone number**.
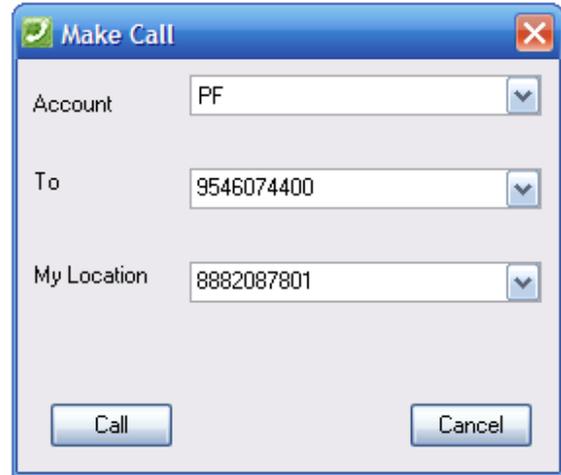
PhoneFusion One will dial the **My Location** number first to ensure you are available for the call requested. Once you answer, it will dial the '**To**' phone number to connect the call.

When you user the 'Make a Call' feature, a Call Control Box will pop up. This box also appears when you receive a call on your PhoneFusion One phone number.

3. Call Control Box

If selected, the call control box is slightly transparent so that you can see the other things on your computer screen when a call is coming in. You can also move the box around on your screen to a place that you prefer, and PhoneFusion One will continue to have the box pop up in that place until you move it somewhere else.

Below is a sample of what the Call Control Box looks like and its available functions.

***These are you options BEFORE you <u>accept</u> the call:***

Add Contact - Click on this icon with a plus sign to add this call to your Microsoft® Outlook® contact folder.

If this contact already exists you will see the View Contact icon.

View contact - Click on the View Contact icon to open the current caller's contact information stored in your Microsoft® Outlook® contact folder. The call control box will display your caller's name each time they call you.

Here is a sample of what the Contact screen would look like (Contact shown here is in Microsoft Office 2007).
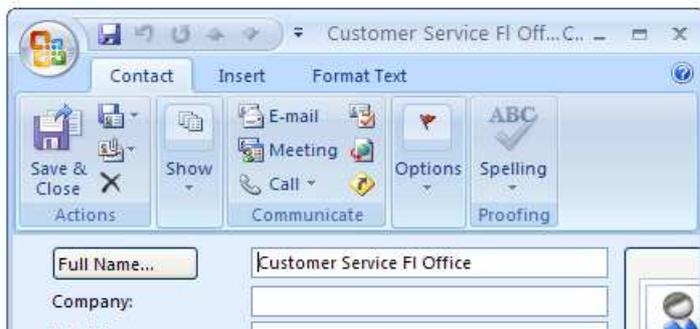
Play "Who's calling" audio (just like on the phone when someone calls).

Send call away without voicemail (Reject). This button will be gray once you answer the call, since you will no longer be able to reject the caller.

Send call to voicemail. This button will also be gray once you answer the call, and you will no longer be able to send the caller to voicemail.
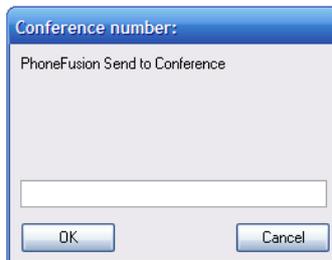
Transfer call: You can select this option to transfer a called that was or was not accepted. Either provide a number to transfer to or select a phone number from the drop down box (which include numbers you've recently dialed) by clicking the arrow on the right-hand side. You can program up to 5 predefined phone numbers (similar to speed dial numbers) you would like to transfer calls to. (See **Manage Transfer Locations** programming details pp. 12) When you're done, click on the 'Transfer' button.

Send call to Meet Me Conference – if you click on this link. You can send the caller directly to your Meet Me Conference feature. A new box will open like the one here. Enter the PhoneFusion One # the Meet Me Conference is programmed on. After you enter the PF1 #; click Ok. The caller will be asked to enter their Meet Me Conference Pin Code.

Expedite handling of this call – if the caller is hearing your incoming greeting, the greeting will interrupted, your music on hold will play and your forwarding destinations will start to ring.

These are you options AFTER you accept the call:

Place the call on Hold - When the call is on Hold, the call control box will display a flashing hand and the Hold button will now show that you can take it 'off' hold.

Transfer call: You can select this option to transfer a called that was or was not accepted. Either provide a number to transfer to or select a phone number from the drop down box (which include numbers you've recently dialed) by clicking the arrow on the right-hand side.

 Turn recording on/off [If Call Recording is already activated on your account.]

 Hang up call

In this part of the Call Control box, PhoneFusion One is displaying the

- <- PhoneFusion One 'Account Name' that received the call

- -> Forwarding destination that 'Accepted' the call

If you 'Accepted' the call, you will find an option to place the call on **Hold**.

4. Manage Transfer Locations

Select the Manage Transfer Locations option from the Control Center Menu to add predefined phone numbers where you will want to transfer calls. These are similar to speed dial locations for numbers you will often need to use for transferring callers within CC.

When you click on Manage Transfer Locations, the box below will open.

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You can assign up to 5 phone numbers, locations 1 through 5.

- Enter a brief name of the phone number you are adding.

- Enter a valid phone number you want calls transferred to when selecting the number to the right of the information you are providing.
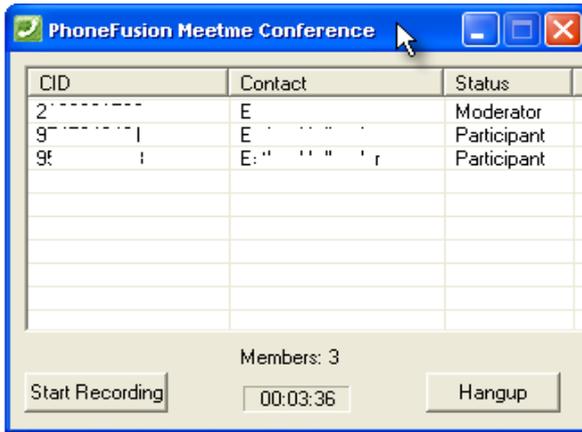
5. Meet Me Conference Display

Control Center now lets you control your Meet Me Conference right from your desktop. You can still choose to hang up on or send callers to voicemail before they join the conference, but once they join, you will see a pop-up box showing all of the participants.

You can see the CID (Caller ID), Contact Name and Status (Moderator or Participant). You have some functionality with the Meet Me Conference box as well.

Start Recording: You can begin recording your conference if you already have the Record Calls functionality on your PhoneFusion One number.

Hangup: You can select one or multiple members to remove from the conference and still speak to the remaining members. When you select those members you wish to remove from the conference, you will be asked if you are sure that you would like to hang up on them. Click Ok or Cancel.

You can also right click on individual or multiple members of the conference have the same functions as at the bottom of the Meet Me Conference box.

6. Messages Menu Options

Messages provides you with detailed information about the all the messages you mailbox has WITHOUT having to log into your account online. The storage capacity your account is at. You can view, listen to, forward, delete and undelete any message listed here. You can also do other things like empty your trash, mark messages read or un-read.

The following are the headings in the Messages box:
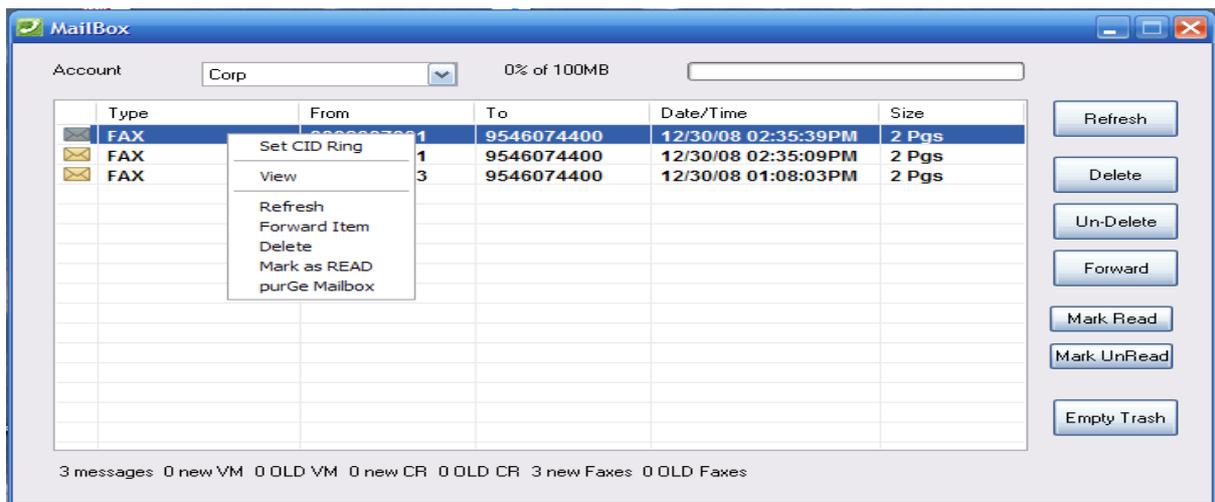
**Type** – The actual type of message you have in your mailbox [Voicemail, Fax or Call Recordings].

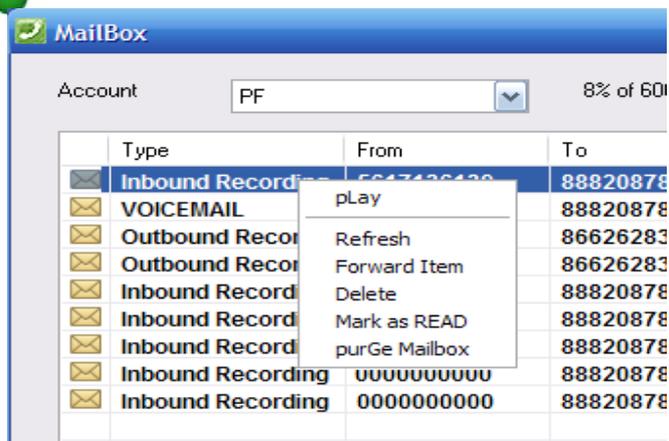**From** – The caller's from phone number or your PhoneFusion One phone number.

To – The PhoneFusion One # called.

Date/Time – Date and Time of the call made or received.

Size – Total length of the call or amount of pages a fax contains.

Additional Messages Menu Options

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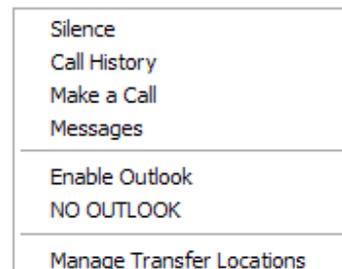
Right click on the message and you will have additional options.


Play Message/View Fax
When you receive a voicemail, call recording or fax message, you can listen to or view your message right from the Messages screen, without logging in.

Refresh
Click on 'Refresh' and PhoneFusion One's Control Center application will update the messages you have received.

Forward Item
You can forward any message here to any email addr34ess you want or another PhoneFusion One user.
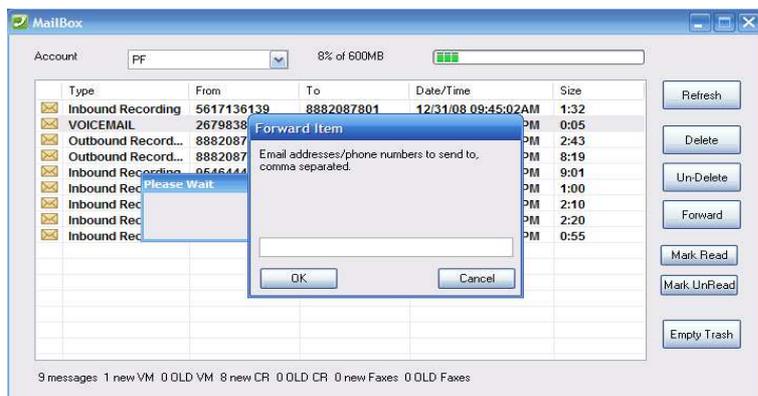
Delete Message from Mailbox
Manage your mailbox right from your Messages screen. You can choose to delete any message from your inbox. These messages will be marked to be deleted. Once these messages are marked to be deleted, you will no longer be able to listen to or view them.

Mark as READ
You can mark your message READ or UNREAD.

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Purge Mailbox
Once messages are marked to be deleted, you can choose to purge the mailbox and permanently delete all messages that are marked to be deleted.

The same options available on this right click menu are also available to the far right hand side of the window.

III. Automatic Updates

Control Center version 1.35 and later have a built in automatic update notices.

Please update the version you are running so avoid any service issues.

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