



BroadCloud Dialer for Chrome

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Frontmatter information

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Acknowledgements

The content herein is based on the following document provided to Cloud Direct as a service provider and reseller of this product:

- BroadCloud Dialer for Chrome™, User Guide, Release 1.5, Document Version 1.2, ©BroadSoft, Inc.

The original document remains untouched except, where appropriate, contact details and web links amended to ensure a positive experience for customers of Cloud Direct.

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BroadCloud Dialer for Chrome™

User Guide

Release 1.5

Document Version 1.2

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BroadCloud™ Dialer for Chrome™ User Guide

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Document Revision History

Release	Version	Reason for Change	Date	Author
1.3	Draft	Created document for Release 1.3	April 18, 2014	Charles Mather
1.4	Draft 2	Updated for Release 1.4	April 29, 2014	Charles Mather
1.4	1.0	Final screenshots	July 31, 2014	Jay Cleveland
1.5	1.1	Updated Images	June 12, 2015	Kareem Rifaat
1.5	1.2	Added info on Updates	June 18, 2015	Kareem Rifaat

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1 Summary of Changes

This section describes the changes to this document for each release and document version.

1.1 Changes for Release 1.5, Document Version 1.2

In call controls (hang up, hold, call counter)

1.2 Changes for Release 1.4, Document Version 1.0

This is the first version of the document.

2 About BroadCloud Dialer for Chrome™

BroadCloud Dialer for Chrome™ is an extension for the Google Chrome™ browser, providing the following communication features.

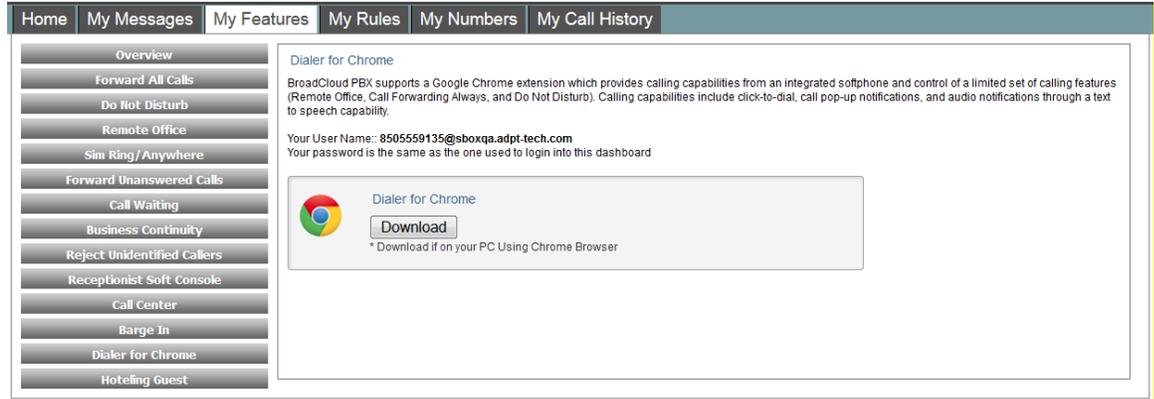
- Click to Call
- Call Notifications
- Directory Search
- BroadCloud Feature Management

3 Getting Started

This User Guide contains the essential information for getting started with BroadCloud Dialer for Chrome™.

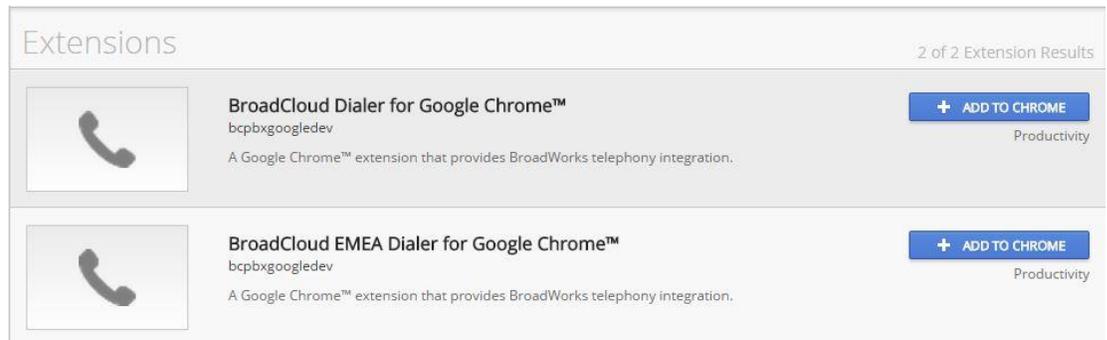
3.1 Installation

Once you receive an email indicating you have been given access to the My Phone dashboard, log in to the dashboard to download the client installer. In the My Features tab, select the Dialer:

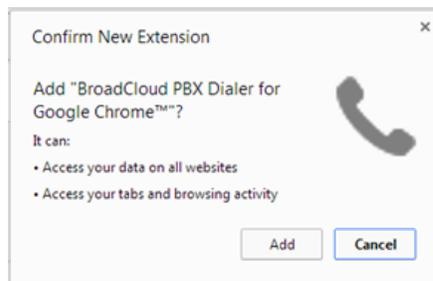


Click the Download button. A new browser window or tab will open directing you to the Google Chrome™ Web Store. Follow the steps below:

- 1) Choose the geographically appropriate link based on your country:



- 2) Select the Add button to confirm and install the extension.



You will receive a confirmation popup that the Dialer for Chrome™ has been successfully installed, and the dialer will appear beside your Omnibox search bar.

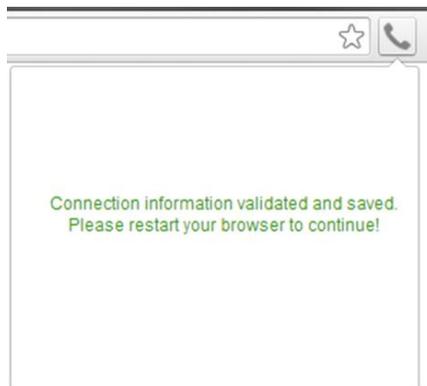


3.2 Sign-in

On first launch, you will be prompted to sign in.

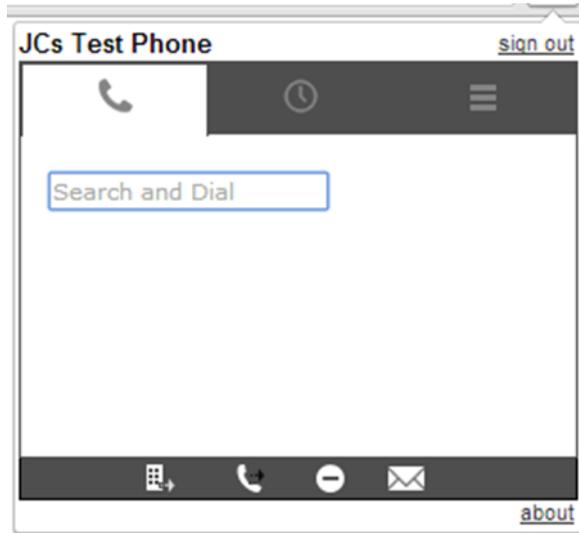


- 1) Enter your *username* that appears in the Dialer for Chrome™ tab in My Phone. The *password* is the same one you use to login to My Phone
- 2) Once you login successfully, you will be prompted to restart your browser to continue.



NOTE: Restarting the Chrome™ browser may actually require logging out of your PC/Laptop.

- 3) Upon restarting, click the icon on the Chrome™ Omnibox bar. When you see the view below, your Dialer for Chrome™ is ready to use. The Dialer will remember your login information and automatically log in until you intentionally sign out.



- 4) Dialer Permissions:

The first time you click into the Search and Dial box, you may be prompted to Allow the Chrome Dialer access to Manage your contacts, click Accept. This will allow the Dialer to search your local contact list.

▾ BroadCloud Chrome Dialer would like to:

 Manage your contacts 

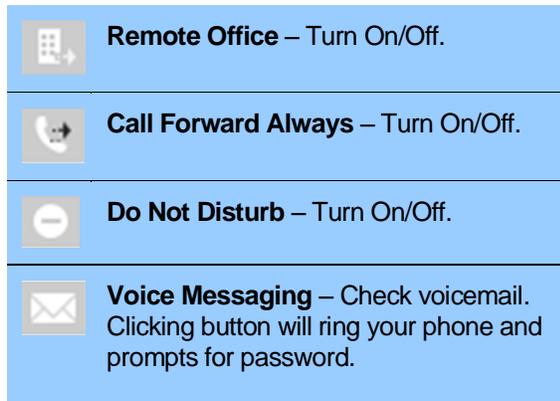
By clicking Accept, you allow this app and Google to use your information in accordance with their respective terms of service and privacy policies. You can change this and other [Account Permissions](#) at any time.

Cancel

Accept

3.3 Managing Features

The toolbar presents buttons to perform quick tasks or access:

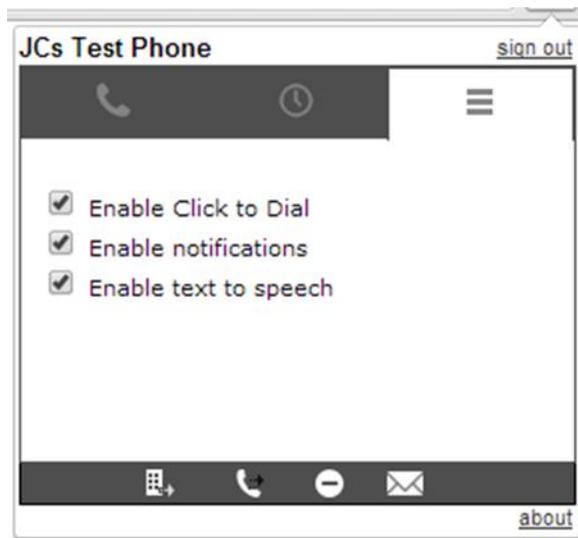


Turning a feature on will change the button color to indicate it is active. 

NOTE: Remote Office and Call Forward Always must be configured in the *My Phone* dashboard and have a valid number assigned in order to utilize the On/Off button in the Dialer. Control Buttons will be dark greyed when feature is active.

3.4 User Preferences

The *Preferences* tab displays options to manage the dialer settings below



- **Enable Click to Dial.** Check to allow calls to be placed when clicking the phone icon in a web page (Section 4.4).
- **Enable notifications.** Check to display audio (if enabled below) notifications of an incoming call. (Section 6).
- **Enable text to speech.** Check to enable an audio notification of an incoming call or feature activation/deactivation from the Toolbar (Section 6.2).

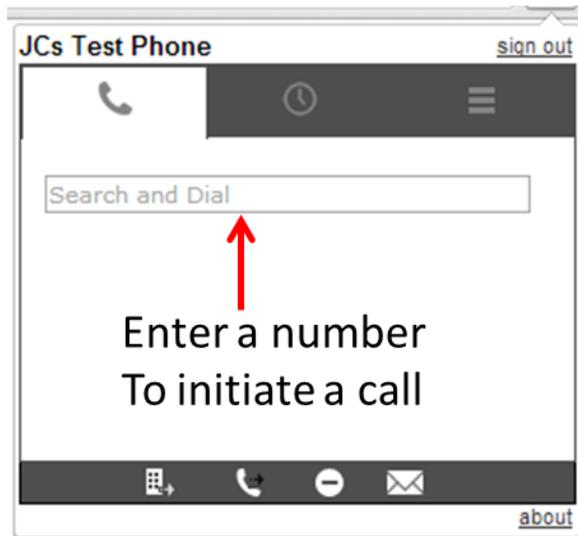
4 Dialer Calling

The Dialer is able to initiate calls in following three ways, detailed in the sections below:

- Using the Search Panel
- Search in Omnibox
- Click to Dial from Web Pages

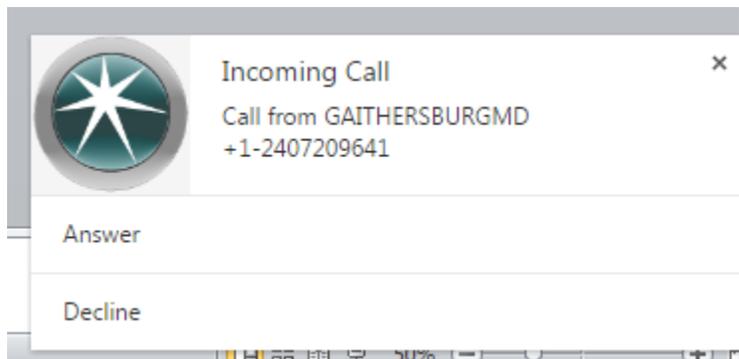
4.1 Enter a number in the Search Panel

Entering a number in the Search bar will initiate a call



4.2 Inbound Calls

The following box will appear when you receive an Inbound call. You have the ability to Accept or Decline the Call. Accepted calls will ring your phone for you to answer. Declined calls will follow the call treatment as specified in your My Phone portal.



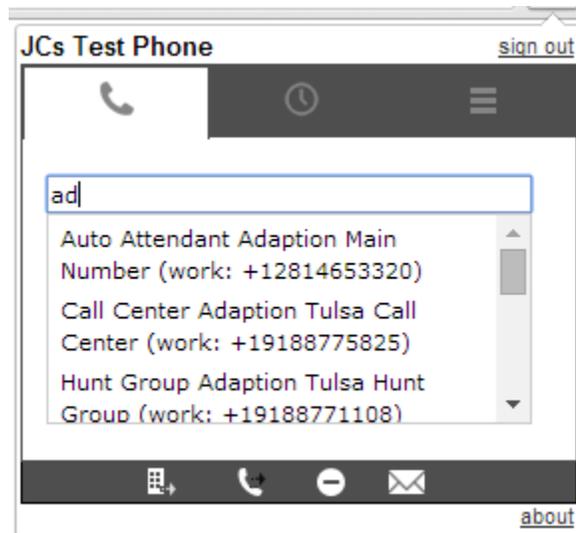
Once you have Accepted the call, the Dialer box will appear as below, allowing you to Hang up the call or place the caller on hold.



4.3 Searching Using the Dialer

Entering a name or number in the Search bar will look for matches in

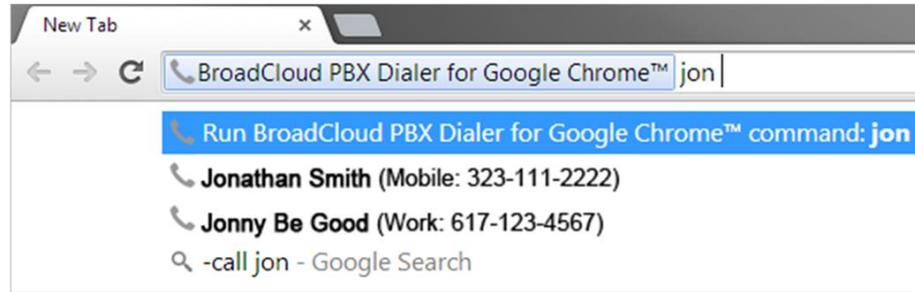
- The Enterprise directory (Company users on the service)
- Your Google contacts



4.4 Search using the Chrome™ Omnibox

The Chrome™ Omnibox (address bar) can be used to search for a called party.

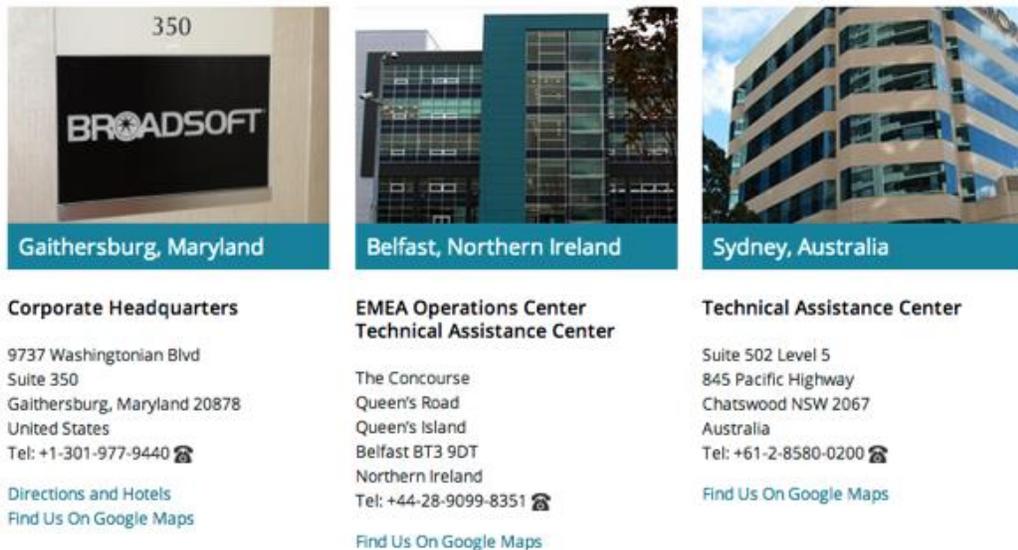
- Type **-call**, then a space or tab. The Omnibox presents the search engine.
- Start entering the name of the contact



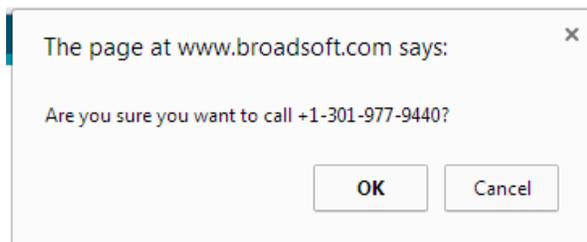
NOTE: The keyword used to initiate dialer search can be edited in Settings - Search – Manage Search Engines.

4.5 Click to Dial from a Web Page

When activated, phone numbers on a web page viewed in Chrome™ displays a phone icon () as in the example below:



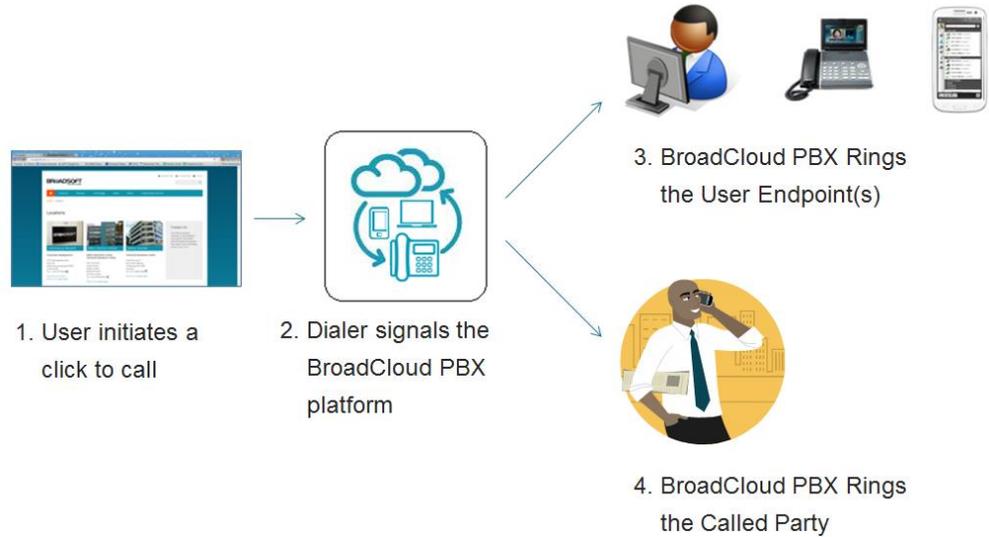
Clicking the icon will open a dialog box:



Selecting OK will place the call. Cancel or "X" will close the dialog box.

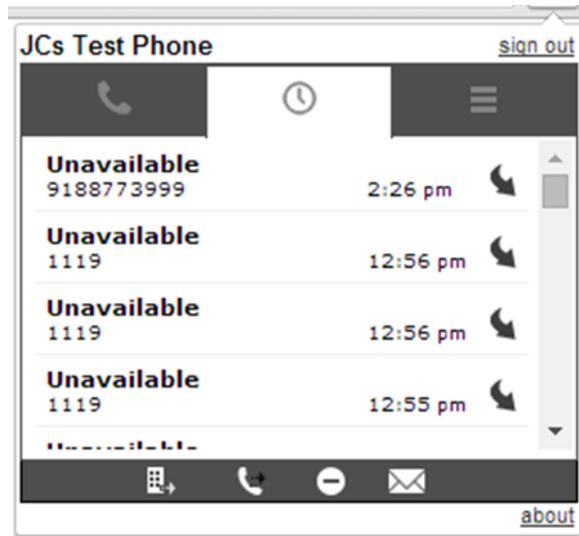
4.6 How it Works

The Dialer is not a soft phone – it is a tool used to initiate a call to ring one of your BroadCloud devices/numbers and connect the call to the called number.



5 Communication History

Call logs are viewable in the *History* tab.



Additional Call History can be found in the *My Phone* Dashboard > *My Call History* tab.

6 Call Notifications

The dialer supports audio notifications, enabled/disabled in the Preferences panel.

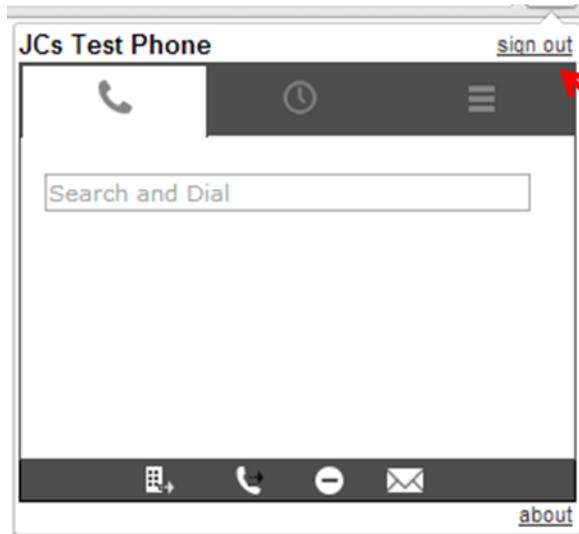
6.1 Audio Notifications

If “Text to speech” is enabled, the Dialer will issue audio notifications for incoming calls and confirmation of feature status change from the Toolbar.

7 Sign Out

The Dialer for Chrome™ will auto-login and retain credentials until you manually log off. Follow these steps to sign out:

- 1) Click the BroadSoft Dialer for Chrome™ icon by the Omnibox.
- 2) Select *Sign Out*.



Click to log
Out of the
Dialer

8 Chrome Dialer Updates

Periodically, BroadCloud will release Updates for the Chrome Dialer by posting a new version on the Google Chrome Store.

If you have already installed a previous version of the Chrome Dialer plugin, your plugin will **automatically** be updated to the newest version. This will be transparent to you and no action is required on your part.

You can check to see what version you are currently running, by:

1. Right clicking on the Chrome Dialer icon in the menu bar and select **Manage Extensions**:

In the Extension list, you will see the Chrome Dialer along with the current version info

