Kerio Operator

User Guide

Kerio Technologies

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Contents

Logging into Kerio Operator Softphone 6
- Overview 6
  - How to log in to Kerio Operator Softphone for web 6
  - How to log in to Kerio Operator Softphone for desktop 7

Using Kerio Operator Softphone 9
- About Kerio Operator Softphone 9
- Making calls through Kerio Operator Softphone 9
- Using the favorites buttons 9
- Using voicemail 9
- Voicemail Menu 10
- Recording your own greeting for voicemail 12
- Uploading your own voicemail announcement messages 12
- Using call forwarding 13
- Call history 13
- Changing password for authentication at Kerio Operator Softphone 14
- Changing the theme 15
- Changing the PIN number 16
- Changing date and time format 17

Making calls through Kerio Operator Softphone 18
- Overview 18
- Switching extensions 18
- Enabling your microphones and cameras 19
- Videocalling in Kerio Operator Softphone 20
- Enabling call notifications 21

Using the favorites buttons in Kerio Operator Softphone 23
- Overview 23
- Using BLF (Busy Lamp Field) 25

Using call pickup in Kerio Operator Softphone 27
- Call pickup overview 27
- Using call pickup in Kerio Operator Softphone 27

Redirecting calls in Kerio Operator Softphone 28
- Overview 28
- Forwarding calls to mobile phones 28
- Redirecting calls to another extension or person 29

Additional configuration ... 31
Configuring extension to allow only one incoming call ... 31
Forwarding calls coming from call queues and ringing groups ... 31

Sending PDF to fax in Kerio Operator Softphone ... 33
Sending PDF to fax ... 33

Hardware telephone basic usage ... 35
General information ... 35
Using loud speaker ... 35
Using Do not Disturb ... 35
Cisco IP Phone 7960/7940 ... 35
Cisco SPA ... 35
Polycom IP 33x ... 35
Forwarding calls ... 36
Conference calls ... 36
Transferring calls ... 36
Attended transfer (Cisco IP Phone 7960/7940) ... 36
Blind transfer (Cisco IP Phone 7960/7940) ... 36
Attended transfer (Cisco SPA) ... 37
Blind transfer (Cisco SPA) ... 37
Attended transfer (Polycom IP 33x) ... 37
Blind transfer (Polycom IP 33x) ... 38
Attended transfer (Snom 300) ... 38
Blind transfer (Snom 300) ... 38
Attended transfer (Snom 320/821) ... 38
Blind transfer (Snom 320/821) ... 39

Configuring software phones on computer or mobile phone ... 40
Configuring softphones ... 40
How to configure a softphone ... 40

Configuring Kerio Operator Softphone for mobile devices ... 41
Overview ... 41
System requirements ... 41
Installing Kerio Operator Softphone ... 41
Configuring Kerio Operator Softphone ... 41
Using the self-signed certificate from your Kerio Operator server ... 42
Configuring mobile data network ... 44

Configuring the X-Lite software phone ... 45
Configuring X-Lite ... 45

Configuring the Ekiga (Gnome Meeting) software phone 48
Configuring the Ekiga software phone 48

Configuring the SJphone software phone 50
Configuring SJphone 50

Configuring the Acrobits Groundwire software phone 53
Configuring the Acrobits Groundwire software phone 53

Using Kerio Operator App for Salesforce 54
Kerio Operator App overview 54
Login to Kerio Operator App for Salesforce 54
Dialing calls (click-to-dial) from Salesforce 56
Displaying contact, account or lead during the call 57
Call logging in Salesforce 58
Advanced settings 60
Changing prefixes 60
Changing a language 60
Opening Kerio Operator Softphone from Kerio Operator App 60
Configuring a time zone 60

Using Click to Call for Kerio Operator plugin for Chrome and Firefox 62
Click to Call for Kerio Operator plugin overview 62
Installing and configuring the Click to Call for Kerio Operator plugin for Chrome 62
Configuring the Click to Call for Kerio Operator plugin for Firefox 64
Using the Click to Call for Kerio Operator plugin 66
Enabling/disabling Click to Call for Kerio Operator 67
Selecting the phone number manually 67

Legal Notice 69
Trademarks and registered trademarks 69

Logging into Kerio Operator Softphone

Overview

This article is for Kerio Operator Softphone for desktop and web.
For information about Kerio Operator Softphone for mobile devices, see Configuring Kerio Operator Softphone for mobile devices,.

We recommend to use the supported browsers to connect to Kerio Operator Softphone. For the list of the browsers, refer to the Kerio Operator product pages.

Kerio Operator Softphone is currently localized into several languages. Select yours in the top right corner of the interface. The default language is set according to your browser language settings.

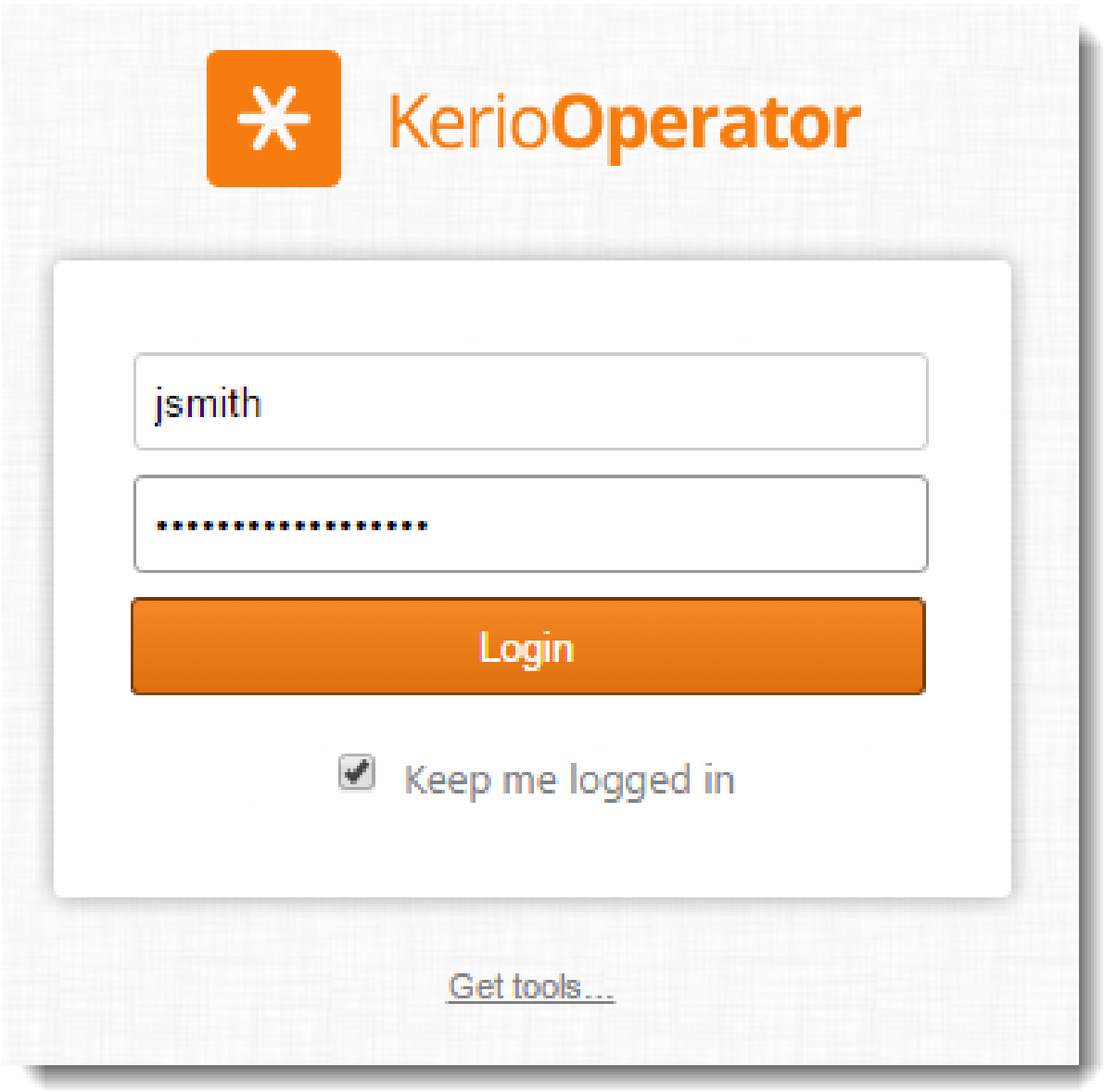
How to log in to Kerio Operator Softphone for web

1. Specify URL in the browser in the following format:

   `http://kerio.operator.name/`

2. If the URL is entered correctly, Kerio Operator Softphone login page is displayed.

3. Use credentials of Kerio Operator user.



How to log in to Kerio Operator Softphone for desktop

When you log into Kerio Operator Softphone for the first time, you must create an account first. With created account, Kerio Operator Softphone logins you automatically at the start of the application.

1. In the Kerio Operator Softphone login page, click **Add account**.
2. Type your username, password and the server address of your Kerio Operator.
3. Click **Login**.

Changing user accounts

If you want to log in as another user:

1. Click **File** → **Logout**.
2. Log in.

Using Kerio Operator Softphone

About Kerio Operator Softphone

Redesigned in Kerio Operator 2.5!
This article is for Kerio Operator Softphone for desktop and web. For information about Kerio Operator Softphone for mobile devices, see Configuring Kerio Operator Softphone for mobile devices.

Kerio Operator Softphone is a user interface which enables you to call through Kerio Operator via your computer of a browser tab.

You can, for example:

- Call people using their names or extensions.
- Customize your voicemail, read and manage your voicemail messages.
- Add people to your **Favorites** — Kerio Operator Softphone shows you if their extension is free or busy.
- Change the theme of your softphone.

Making calls through Kerio Operator Softphone

For more information, see Making calls through Kerio Operator Softphone.

Using the favorites buttons

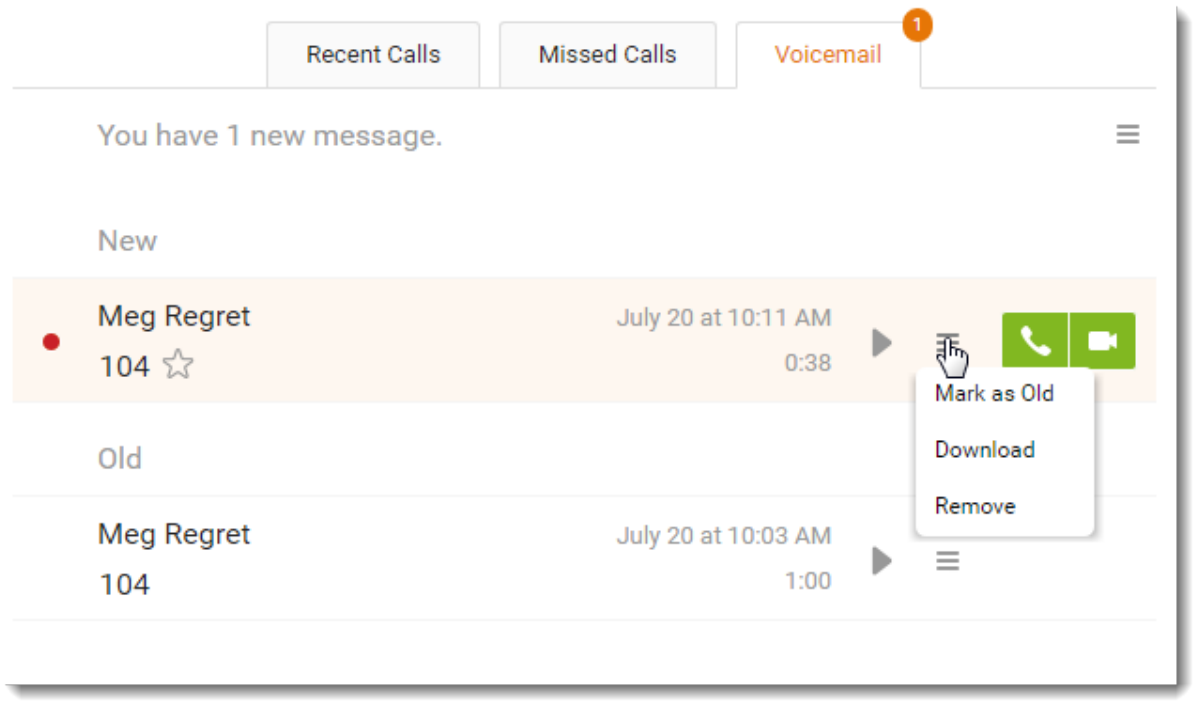
In Kerio Operator Softphone, you can add people to your **Favorite buttons**. For more information, see Using the favorites buttons in Kerio Operator Softphone.

Using voicemail

For the configuration of voicemails in the administration interface, see Configuring voicemail.

In Kerio Operator Softphone, go to **Voicemail** to:

- Play, download, and remove voicemail messages
- Dial numbers that left voicemail messages
- Mark voicemail messages as unread
- Dial voicemail number



Voicemail Menu

After reaching your voicemail, an automatic menu will navigate you through your messages and other options. You can view the whole menu in picture.

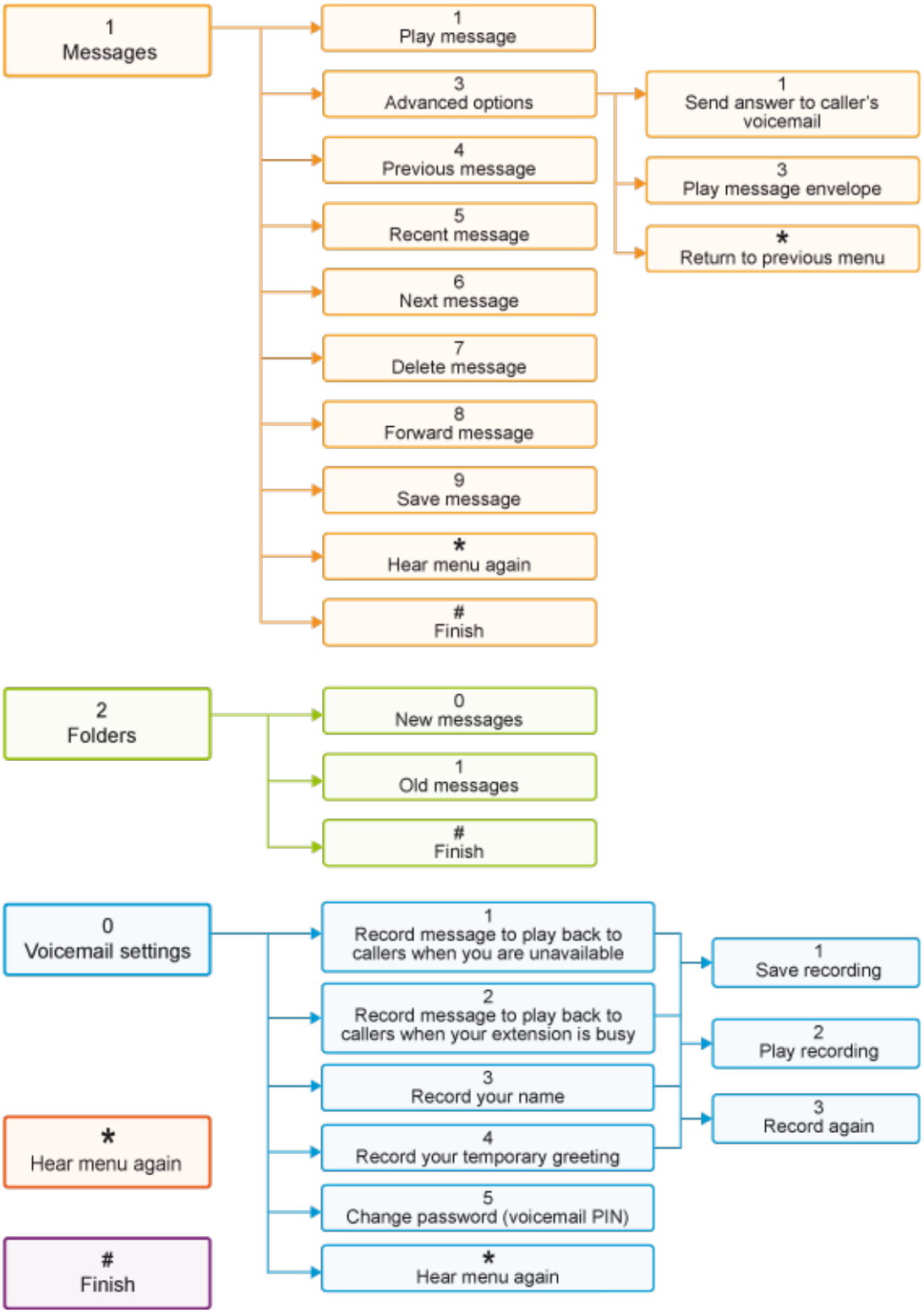


Figure 1 Voicemail Menu

Recording your own greeting for voicemail

If you wish to record your own greeting to voicemail, such as: “Hello. You have reached Kelly Jellybelly. I can’t answer the phone right now, but please leave me a message.”, follow these instructions:

1. Login to your voicemail, enter the PIN and press `0`.
2. Follow the instructions of the auto attendant script.

Uploading your own voicemail announcement messages

New in Kerio Operator 2.4.0!

You can now upload your own sound files and change your voicemail messages:

1. In Kerio Operator Softphone, click your name to open the toolbar.
2. Go to **Settings** → **Voicemail**.
3. In the line of a message you want to change, click **Upload File** and select a new file.

You can upload only files in a `.wav` format. The maximum length of the sound file is 30 seconds.

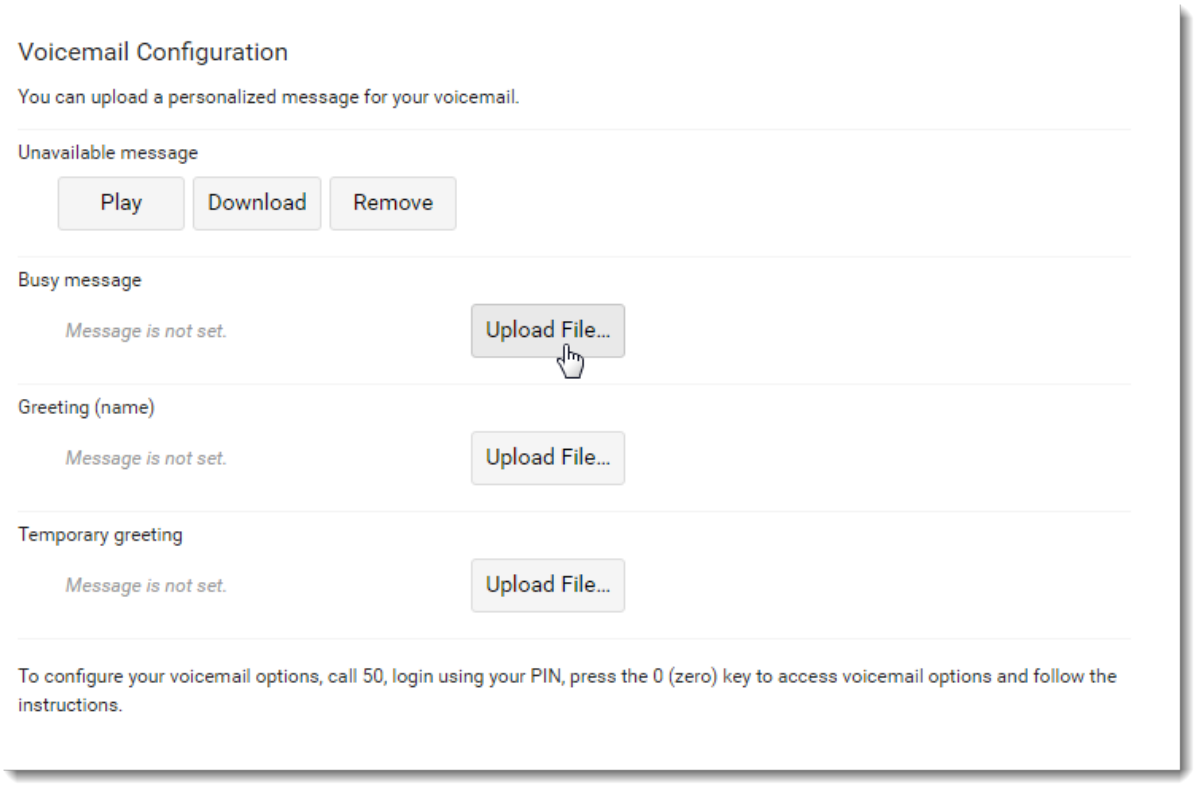


Figure 2

Using call forwarding

Redirecting calls to another phone is described in article Redirecting calls in Kerio Operator Softphone.

Call history

Kerio Operator Softphone logs every call you make, receive, and miss and displays them under following tabs in the Calls section:

- **Recent Calls** for incoming and outgoing calls
- **Missed Calls** for missed calls

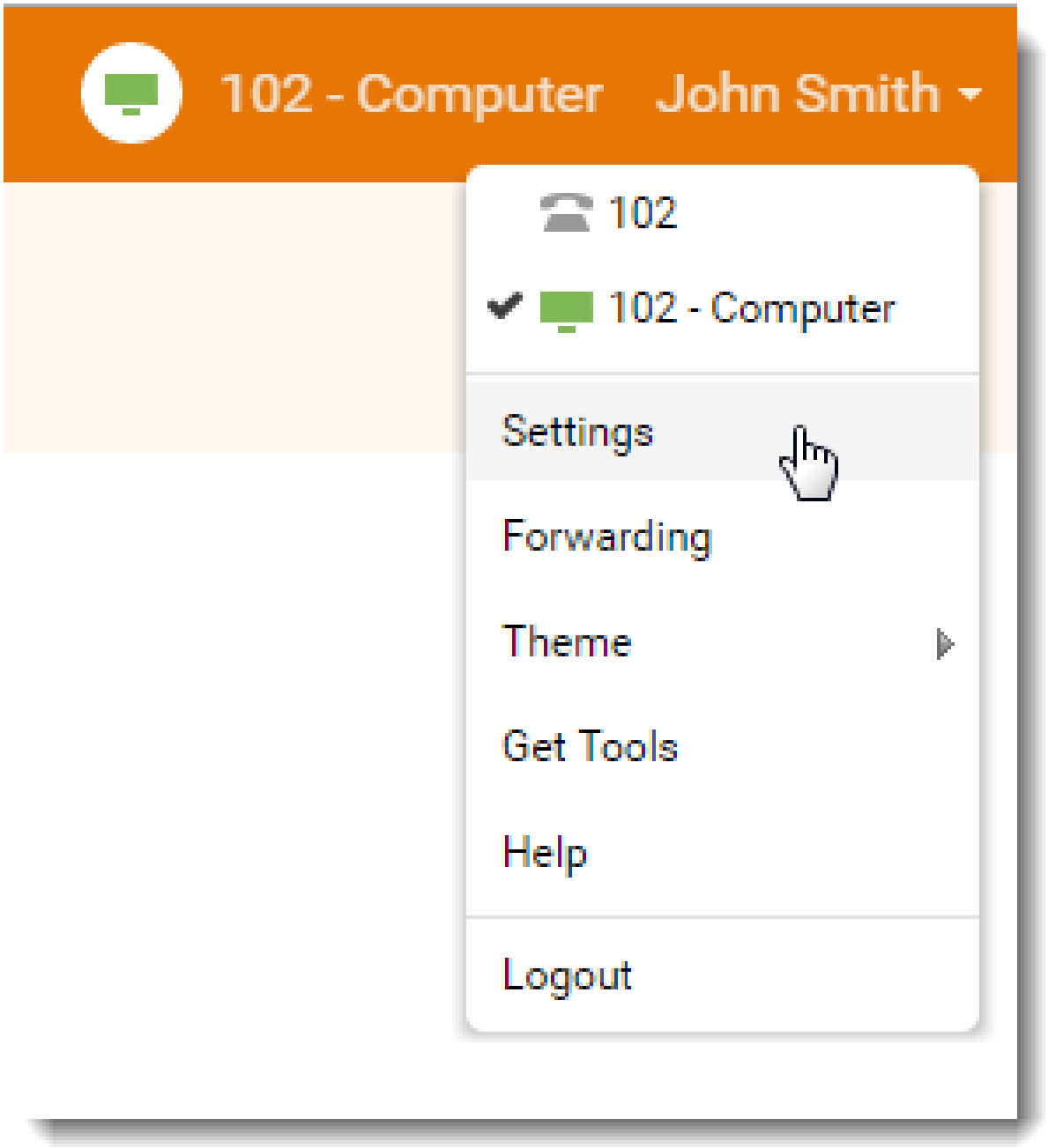
To dial the contact straight from the call history tabs, click or .

Changing password for authentication at Kerio Operator Softphone

1. Log in to Kerio Operator Softphone.

   In Kerio Operator Softphone for web, you can change your password only via the HTTPS protocol. Type the following address in your browser's address bar: `https://address`

2. Click your name to open the toolbar.
3. Go to **Settings** → **Password**.
4. Type your current and new passwords.
5. Click **Change Password**.



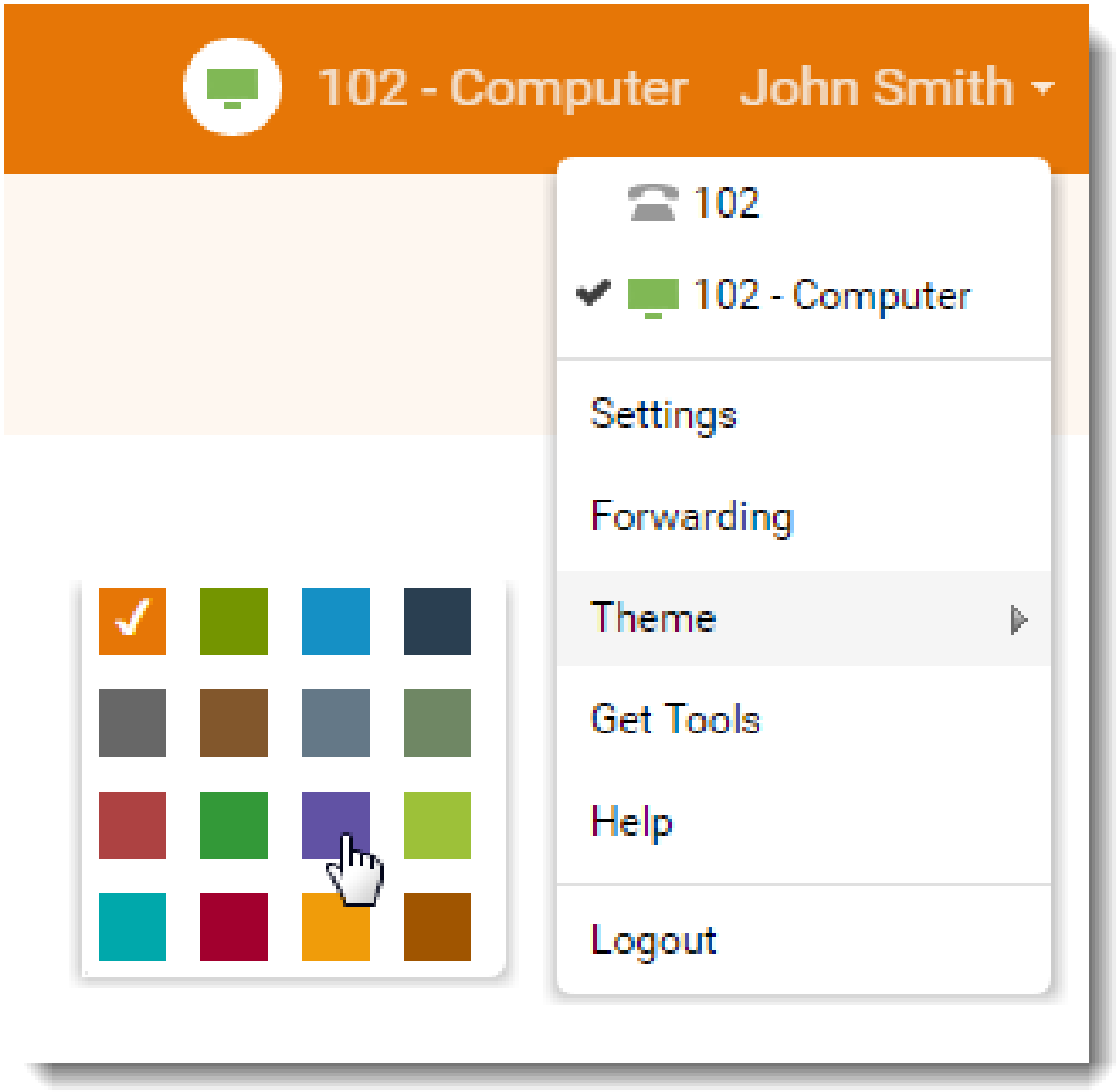
If you do not remember your password, contact your network administrator. They can set a new password for you.

Changing the theme

If you want to change the color theme of your Kerio Operator Softphone:

1. Click your name to open the toolbar.
2. Go to the **Change theme** section.

3. Select a new color.



Changing the PIN number

1. Login to Kerio Operator Softphone.

> In Kerio Operator Softphone for web, you can change your PIN only via the HTTPS protocol. Type the following address in your browser's address bar: `https://address`

2. Click your name to open the toolbar.
3. Go to **Settings** → **PIN**.
4. Type new PIN.
5. Click **Change PIN**.

Changing date and time format

To change the date and time format (for example, in history):

1. In Kerio Operator Softphone, click your name to open the toolbar.
2. Go to **Settings** → **General**.
3. In the **Locales** section, deselect **Set your locale to match your language settings**.
4. Select a format for the date and time.
5. Click **Save**.

Making calls through Kerio Operator Softphone

Overview

New in Kerio Operator 2.5!

You can use Kerio Operator Softphone to make calls and video calls directly from your browser or computer without additional applications or hardware phones. To do so, you must switch to the Computer extension and enable your browser to use your microphone and camera.

You can also use Kerio Operator Softphone to dial numbers on your hardware phone or another softphone.

Kerio Operator Softphone uses WebRTC for incoming and outgoing calls. For a list of browsers that supports WebRTC, see this page.

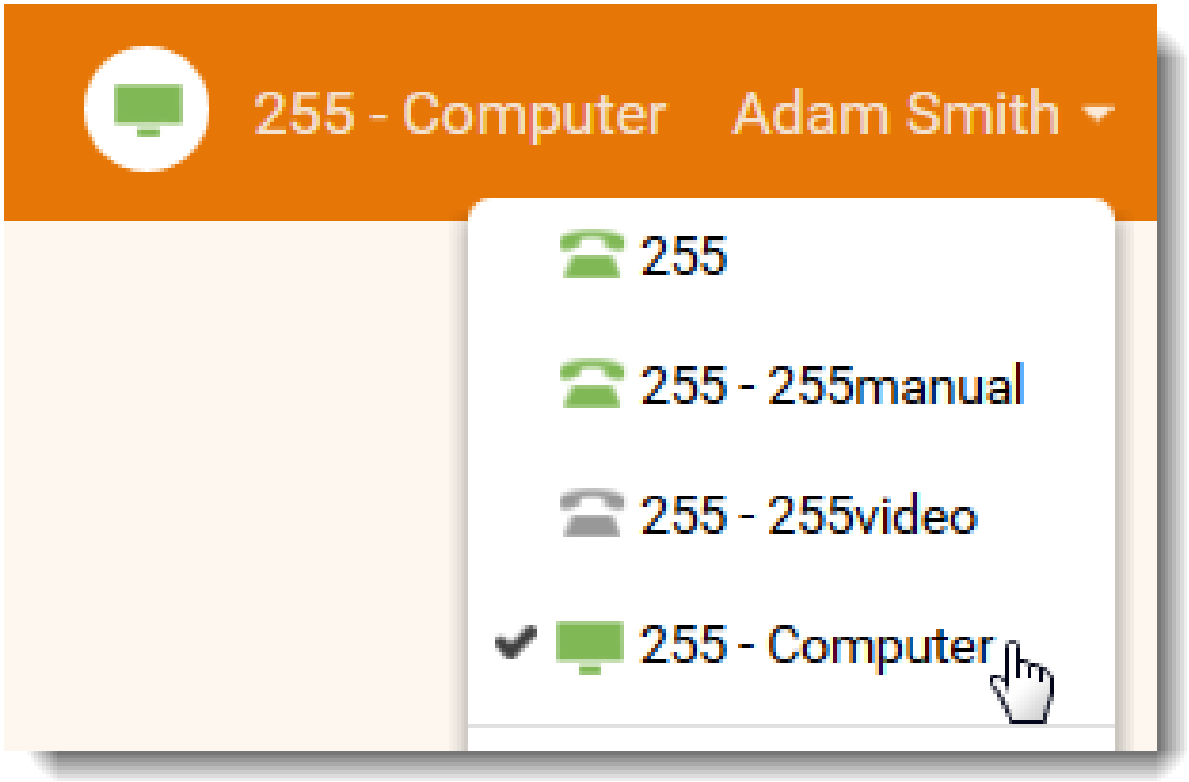
Kerio Operator Softphone is not intended for emergency calling. Call may not provide accurate location data, may be misdirected to the wrong emergency response center, or the emergency response center may not be able to accurately determine your location.
Use Kerio Operator Softphone only as a last resort and make sure you tell the emergency response center your location.

Switching extensions

To switch to the extension for browser calling:

1. In Kerio Operator Softphone, click your name in the upper right corner.
2. Select the **Computer** extension.

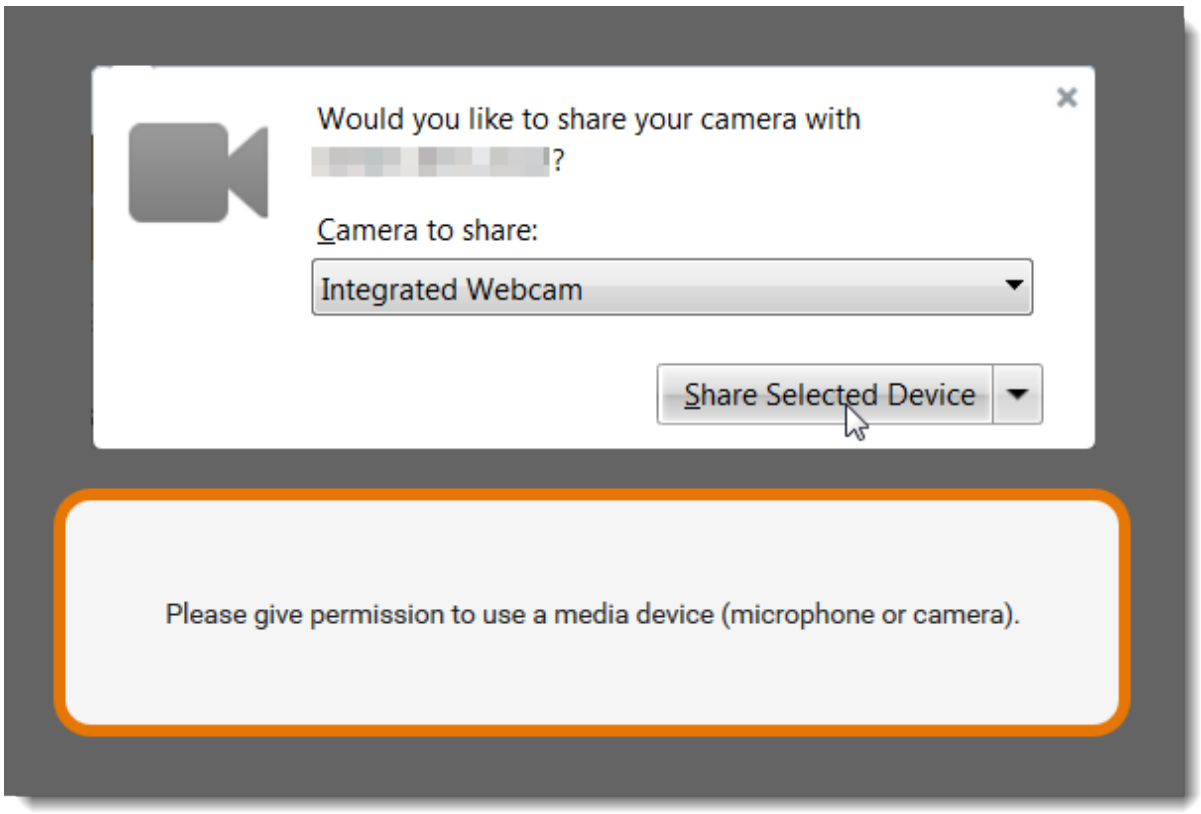
Kerio Operator Softphone now uses the extension for calls.



Enabling your microphones and cameras

To use your microphone and camera:

1. In Kerio Operator Softphone, click your name in the upper right corner and go to **Settings**.
2. Go to the **Sound and Video** section.
3. When the browser's pop-up shows up, allow your browser to use your microphone and camera.
4. In the Ringing drop-down list, select a device where incoming calls ring.
5. In the Speakers drop-down list, select a device for call audio.
6. Test the echo of your microphone.



From now on, Kerio Operator Softphone uses the selected devices for your calls. You can change devices in the **Sound and Video** section.

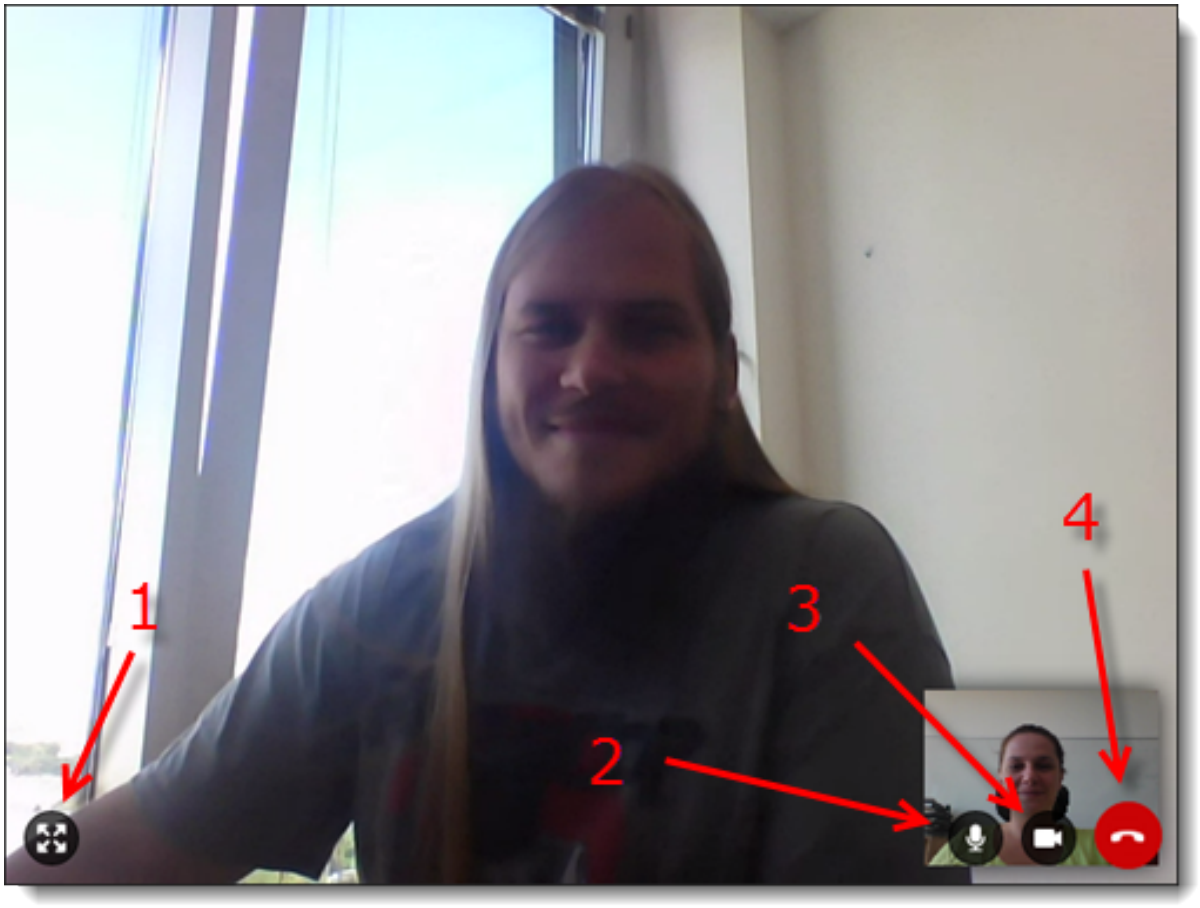
Videocalling in Kerio Operator Softphone

Kerio Operator Softphone allows you to make browser-to-browser video calls. To make video calls, switch to the Computer extension and enable your camera.

To initiate a video call:

1. In Kerio Operator Softphone, type a number or select a contact.
2. Click .

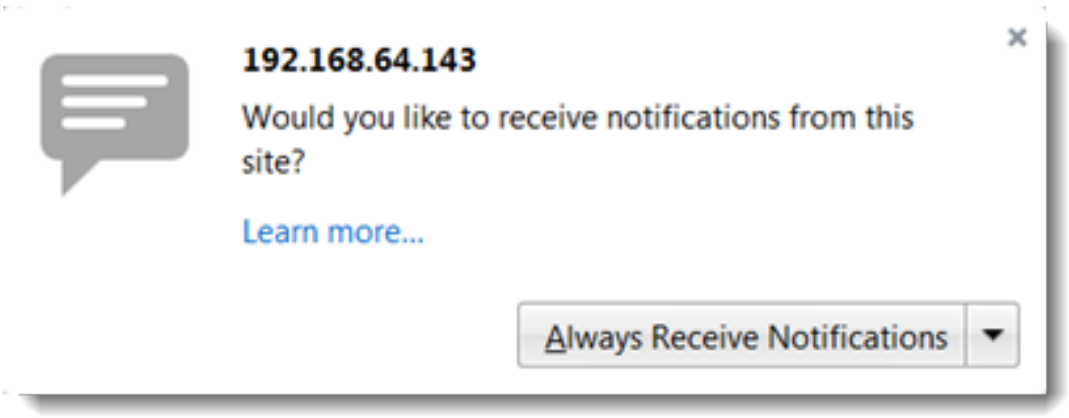
   A window with video transmission opens.
3. In the call window, you can:
   - Enter the full screen mode (1).
   - Mute your sound (2).
   - Disable your camera (3).
   - Hang up (4).



Enabling call notifications

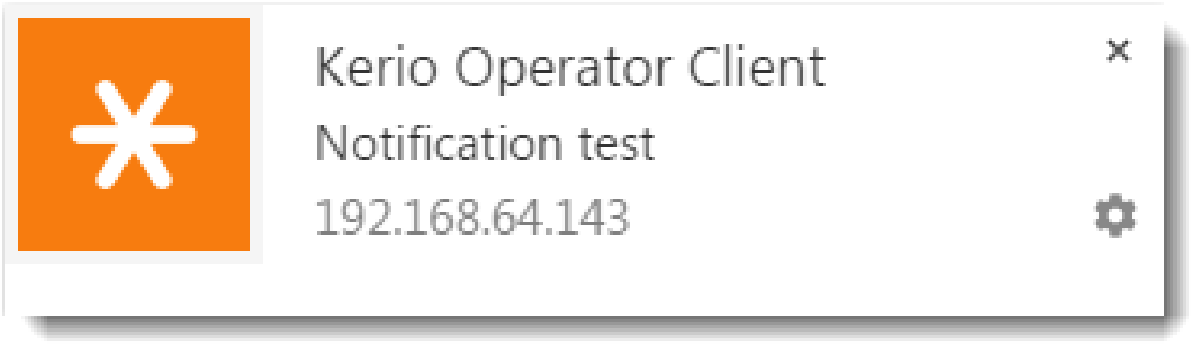
To have a better perspective about your incoming calls, enable call notification:

1. Click your name.
2. Go to **Settings** → **General**.
3. In the **Notifications** section, select **Enable call notifications**.
4. Allow your browser to send notifications Kerio Operator Softphone.



5. Click **Test** to see if notifications work.

6. Click **Save**.



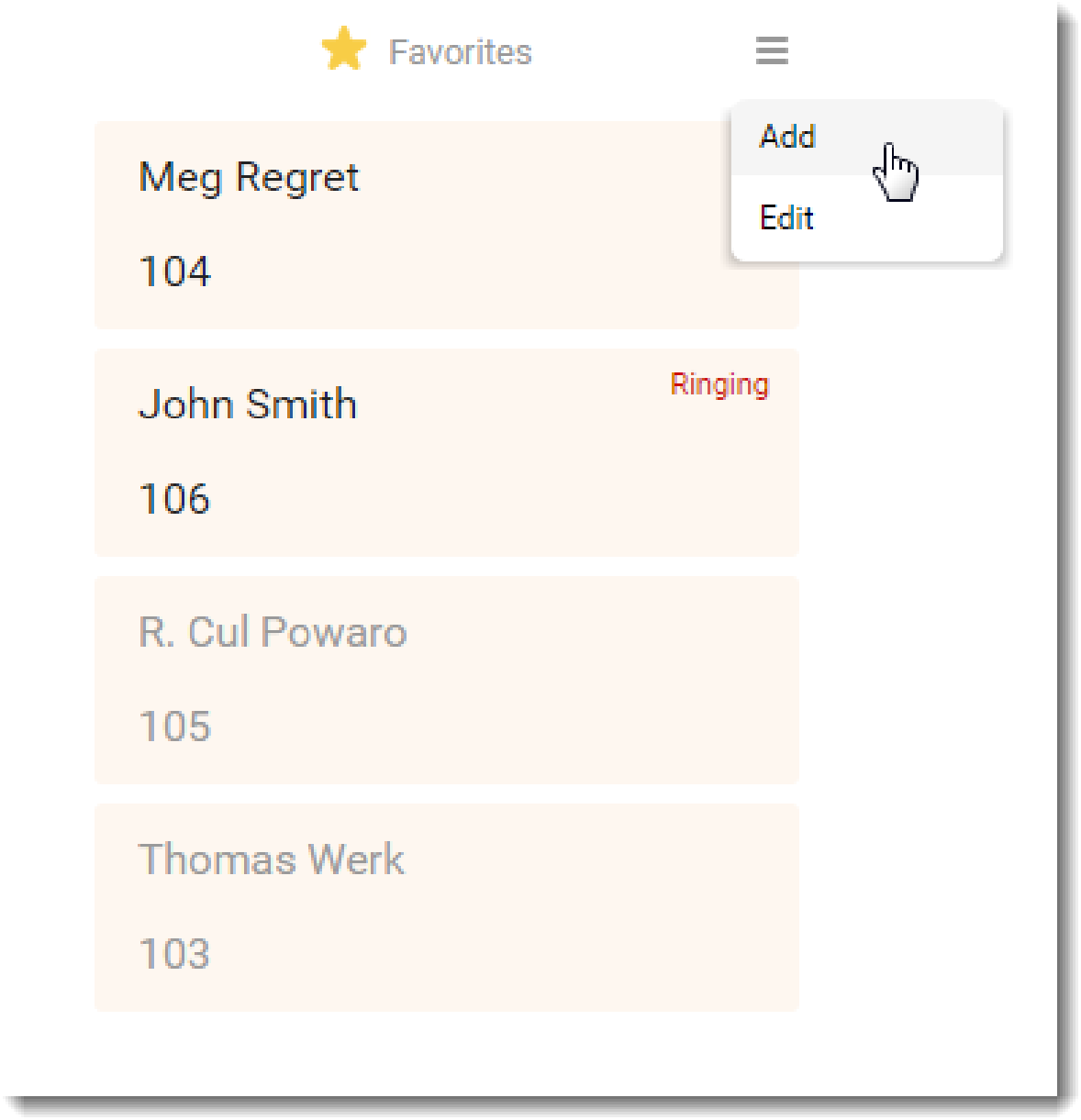
Using the favorites buttons in Kerio Operator Softphone

Overview

In Kerio Operator Softphone for desktop and web, you can add people or numbers to **Favorites**.

To add or edit your favorites, open the context menu and click **Add** or **Edit**.

If you use a prefix for outgoing calls, add numbers with the prefix. For example, for prefix 9 and number 5000195, dial 95000195.



To enlarge the section for your **Favorites**:

1. In Kerio Operator Softphone, click your name to open the toolbar.
2. Go to **Settings**.
3. In the **View** section, select **Enable wide view**.
4. Click **Save**.

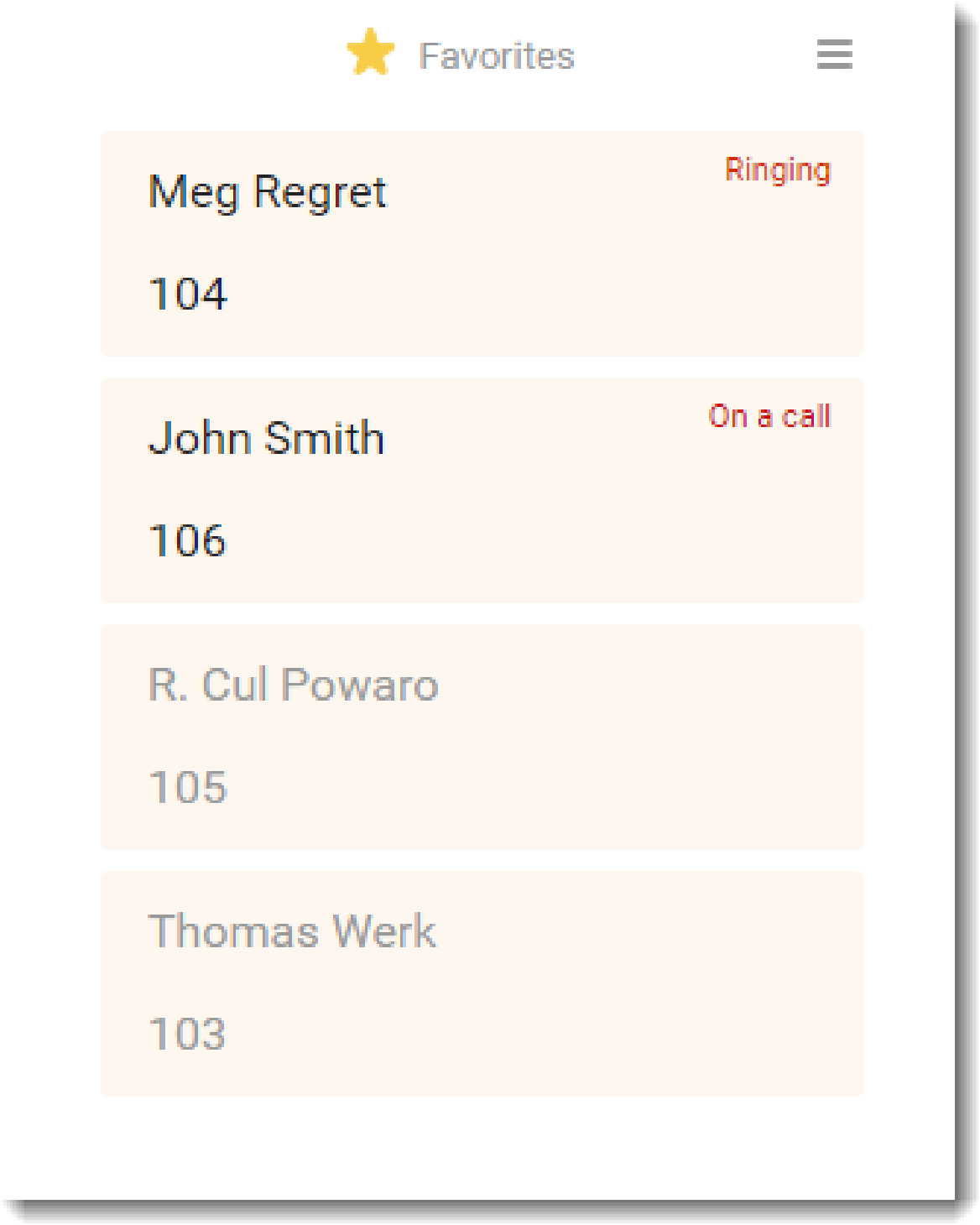
Using BLF (Busy Lamp Field)

Kerio Operator Softphone displays the status of other users phones.

BLF works only for users in Kerio Operator. If you add, for example, a cell phone number or phone numbers of your customers, BLF does not work.

Kerio Operator displays that users are:

- Online — the name is black.
- Offline — the name is gray.
- Busy or their extension is ringing.
- On a call.



Kerio Operator Softphone also supports directed call pickup. Read more in the Using call pickup in Kerio Operator Softphone article.

Using call pickup in Kerio Operator Softphone

Call pickup overview

This article is for versions of Kerio Operator 2.4.9 and older.

Call pickup enables you to pick up colleague's ringing phone directly in Kerio Operator Softphone.

You can use call pickup if your administrator enables it in Kerio Operator.

Using call pickup in Kerio Operator Softphone

To pick up someone's call:

1. Go to Kerio Operator Softphone.

   If you do not know what Kerio Operator Softphone is, read the Using Kerio Operator Softphone article.

2. Configure favorite buttons.

3. Jim's phone extension is ringing.

   Jim's favourite button is blinking.

4. Click Jim's favorite button.

   Kerio Operator connects you to a person, who dialed Jim's extension.

5. To end up the call, click icon.

Redirecting calls in Kerio Operator Softphone

Overview

Redesigned in Kerio Operator 2.4!
This article is for Kerio Operator Softphone for desktop and web.

Kerio Operator can route incoming calls to different internal extensions or external numbers.

You can configure call forwarding (ringing rules) in the **Forwarding** section.

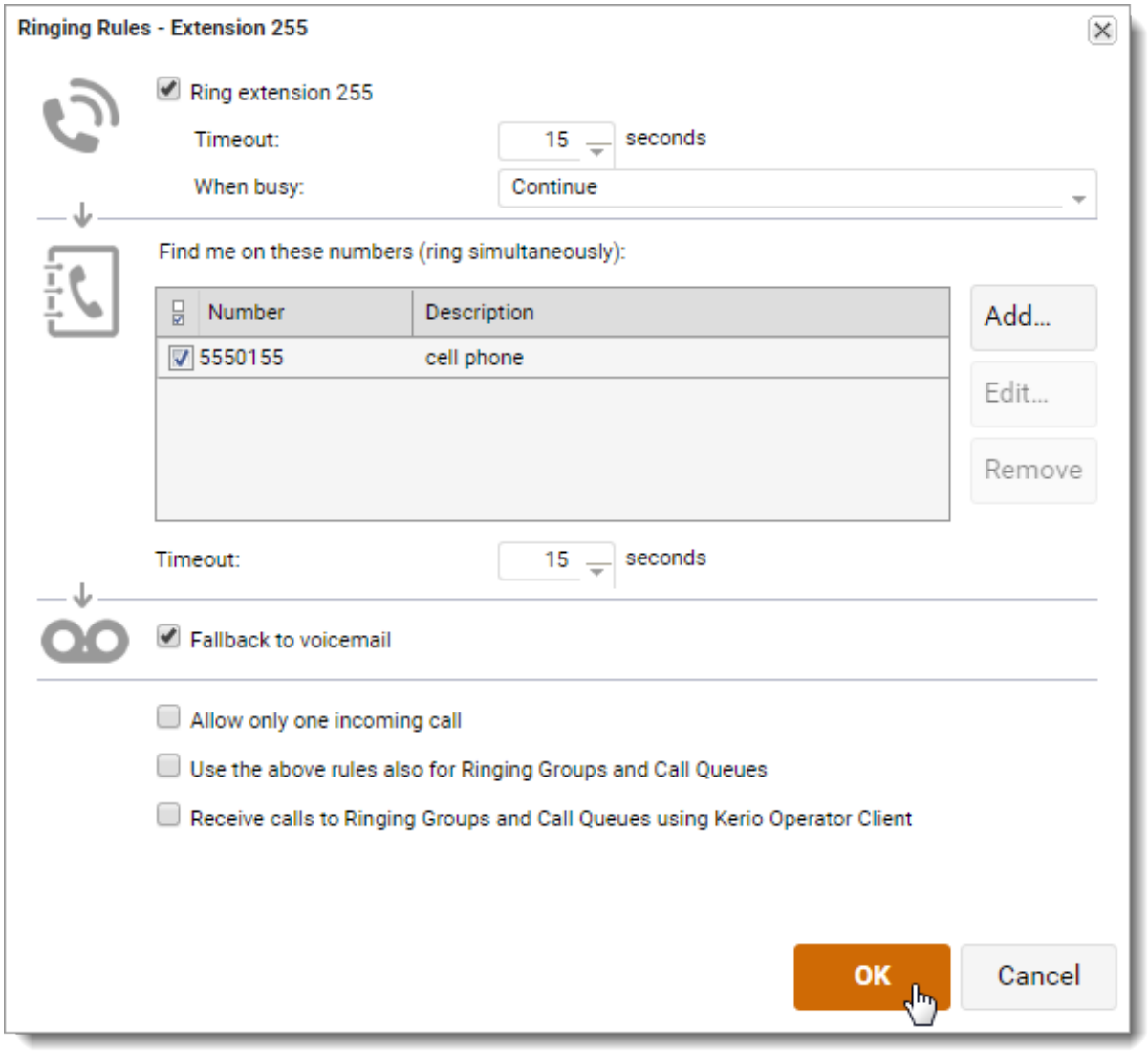
Forwarding calls to mobile phones

See the following example:

Bob has the internal extension `255` and a cell phone with the number `5550155`. He wants to receive calls on his cell phone. When he is busy, calls fallback to voicemail.

1. In Kerio Operator Softphone, click your name to open the toolbar.
2. Go to **Forwarding**.
3. Click **Set up advanced ringing rules**.
4. Enable the **Ring extension** option.
5. Select a number for **Timeout**.

   When the specified time runs out, Kerio Operator forwards the call.
6. For **When busy**, select the **Continue** option.
7. Click **Add** and type a number **5550155** and a description (for example, cell phone).
8. Select a number for **Timeout**.
9. Enable the **Fallback to voicemail** option.
10. Click **OK**.



Administrators can change also these settings in the administration interface. Contact the administrator if you need help.

Redirecting calls to another extension or person

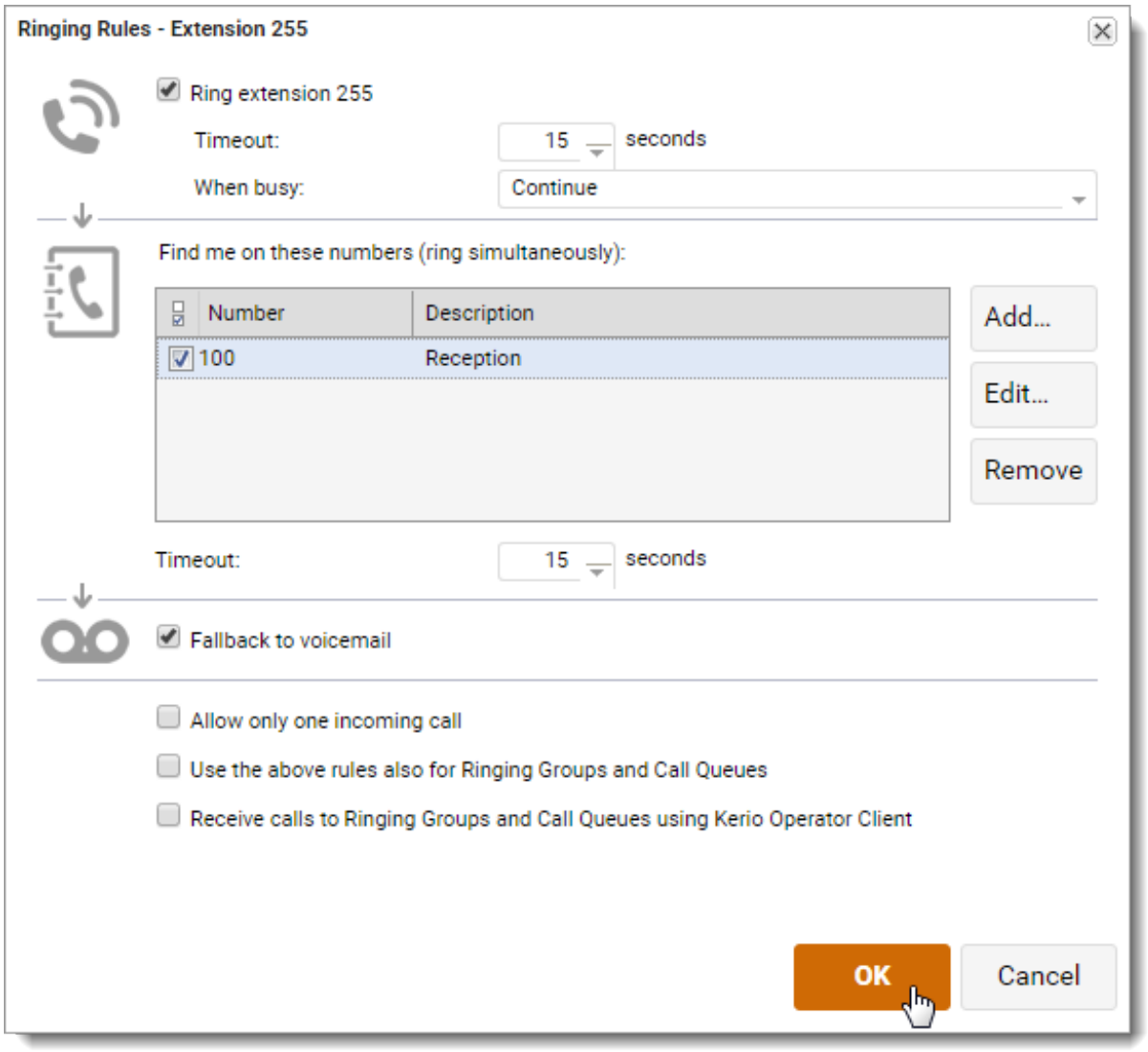
In Kerio Operator Softphone, you can also redirect calls to another extension.

See the following example:

Bob has the internal extension 255. He wants to forward calls to an extension 100 (reception) and disable fall back to voicemail.

1. In Kerio Operator Softphone, click your name to open the toolbar.
2. Go to **Forwarding**.

3. Click **Set up advanced ringing rules**.
4. Enable the **Ring extension** option.
5. Select a number for **Timeout**.
   When the specified time runs out, Kerio Operator forwards the call.
6. For **When busy**, select the **Continue** option.
7. Click **Add** and type a number **100** and a description (Reception).
8. Select a number for **Timeout**.
9. Disable the **Fallback to voicemail** option.
10. Click **OK**.



Additional configuration

New in Kerio Operator 2.4!

For call forwarding, you can configure additional settings

- Configure extension to allow only one incoming call
- Apply ringing rules to calls coming from call queues and ringing groups.

Configuring extension to allow only one incoming call

If you have a phone that supports multiple calls, you can configure your extension to reject or redirect additional incoming calls when your extension is busy.

1. In Kerio Operator Softphone, click your name to open the toolbar.
2. Go to **Forwarding**.
3. Click **Set up advanced ringing rules**.
4. Enable the **Allow only one incoming call** option.
5. Click **OK**.

Kerio Operator now handles with incoming calls using the configuration set in the **Forwarding** dialog box.

Forwarding calls coming from call queues and ringing groups

To configure forwarding for calls from call queues and ringing groups:

1. In Kerio Operator Softphone, click your name to open the toolbar.
2. Go to **Forwarding**.
3. Click **Set up advanced ringing rules**.
4. Enable the **Use the above rules also for Ringing Groups and Call Queues** option.
5. Click **OK**.

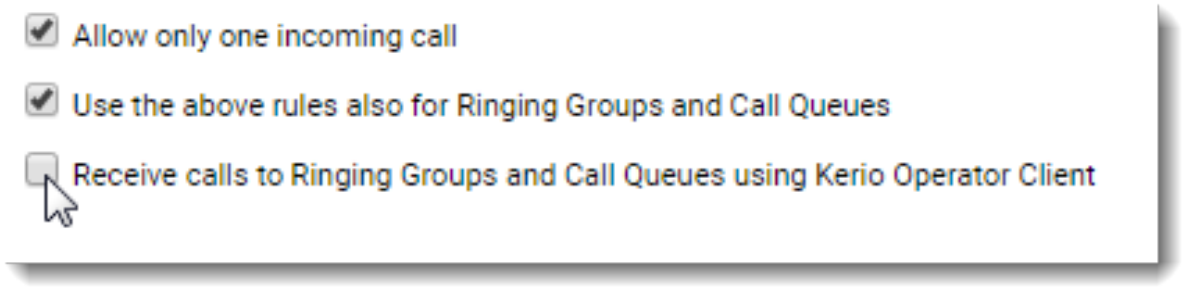

Allow only one incoming call
Use the above rules also for Ringing Groups and Call Queues
Receive calls to Ringing Groups and Call Queues using Kerio Operator Client

Figure 1

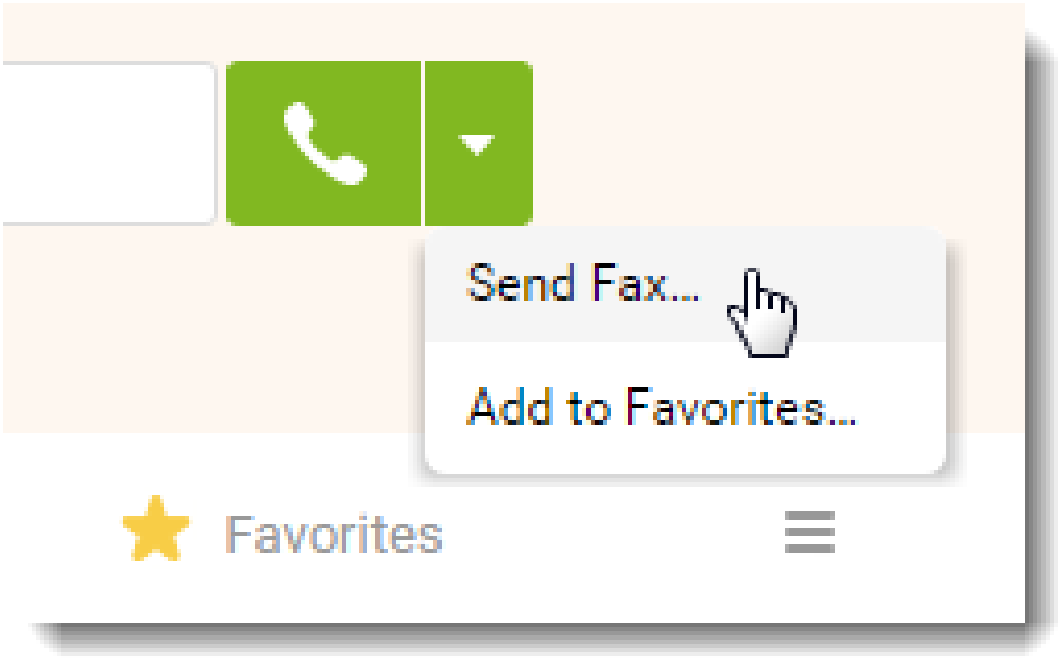
Sending PDF to fax in Kerio Operator Softphone

Sending PDF to fax

Redesigned in Kerio Operator 2.5!

Kerio Operator Softphone for desktop and web allows you to send faxes by uploading PDF files.

1. In Kerio Operator Softphone, switch to the **Calls** tab.
2. Open the context menu and click **Send fax**.



3. Select the PDF file.
4. Type name or number of the fax recipient.
5. (Optional) For a better quality of the fax, select **Fine resolution**.
6. Click to send the file.

You can send maximum of 50 pages in a single PDF file.

Hardware telephone basic usage

General information

This article includes information on how to use common functions of hardware phones (supported by Kerio Technologies).

Using loud speaker

Every telephone has a special button for loud speaker (speaker button). You can usually press this button either before dialing or anytime during a call.

Using Do not Disturb

If you select Do not Disturb option (DnD), the phone will generate the busy tone to inform the other party that you are not available. If you wish to block all incoming calls from the phone, follow these instructions:

Cisco IP Phone 7960/7940

1. Press the **Settings** button .
2. Scroll to **Call Preferences** and press **Select**.
3. Scroll to **Do Not Disturb**.
4. Press **Yes**.

Cisco SPA

1. Press **more**.
2. Press **DnD**.

Polycom IP 33x

1. Press **Menu**.
2. Select **Features**.
3. Select **Do not disturb**.

For unblocking incoming calls, use the same sequence.

Forwarding calls

You can configure forwarding on your phone. However, you can set it in Kerio Operator Softphone too.

Conference calls

You can configure conference calls on your phone. However, the less complicated way is to create and use conferences in Kerio Operator.

Transferring calls

When you want to transfer a call, you usually have two options:

- attended transfer (you can connect with the third party, find out if the person is on the phone and make an announcement)
- blind transfer (the call is transferred without announcing)

Attended transfer (Cisco IP Phone 7960/7940)

1. Initiate or answer the call.
2. Press **more**.
3. Press **Transfer**.
4. Dial the number to which you want to transfer the call.
5. When the dialed number rings, press **Transfer** again, or wait for the other party's answer, announce the call and then press **Transfer**.
6. Hang up if the party accepts the call.

If the party refuses the call, return to the original call by pressing the **Resume** softkey.

Blind transfer (Cisco IP Phone 7960/7940)

1. Initiate or answer the call.
2. Press **more**.
3. Press **BlndXfr**.

4. Dial the number to which you want to transfer the call.
5. Terminate the call.

Attended transfer (Cisco SPA)

1. Initiate or answer the call.
2. Press **Trnsfer**.
3. Dial the number to which you want to transfer the call.
4. Wait for the connection.
5. Press **Trnsfer** again.
6. Hang up.

Blind transfer (Cisco SPA)

1. Initiate or answer the call.
2. Press **Trnsfer**.
3. Dial the number to which you want to transfer the call.
4. Press **Trnsfer** again.
5. Hang up.

Attended transfer (Polycom IP 33x)

1. Initiate or answer the call.
2. Press **Trans**.
3. Dial the number to which you want to transfer the call.
4. Wait for the connection.
5. Press **Trans** again.
6. Hang up.

Blind transfer (Polycom IP 33x)

1. Initiate or answer the call.
2. Press **Trans**.
3. Press **Blind**.
4. Dial the number to which you want to transfer the call.
5. Hang up.

Attended transfer (Snom 300)

1. Initiate or answer the call.
2. Press **L1/L2** key (hold).
3. Dial the number to which you want to transfer the call.
4. Wait for the connection.
5. Press **Transfer** key.
6. Press **OK** key.
7. Hang up.

Blind transfer (Snom 300)

1. Initiate or answer the call.
2. Press **Transfer** key.
3. Dial the number to which you want to transfer the call.
4. Press **OK** key.
5. Hang up.

Attended transfer (Snom 320/821)

1. Initiate or answer the call.
2. Press **Hold** key.
3. Dial the number to which you want to transfer the call.

4. Wait for the connection.
5. Press **Transfer** key.
6. Press **OK** key.
7. Hang up.

Blind transfer (Snom 320/821)

1. Initiate or answer the call.
2. Press **Transfer** key.
3. Dial the number to which you want to transfer the call.
4. Press **OK** key.
5. Hang up.

Configuring software phones on computer or mobile phone

Configuring softphones

To configure a software phone, have the following information ready:

- IP address or DNS name of the computer with Kerio Operator.
- Extension number.
- SIP username and SIP password associated with the phone extension (see article Creating extensions). Note that the SIP password does not match the password used for connection to Kerio Operator Softphone.
- Information whether the extension will be behind NAT. If so, configure the user account in Kerio Operator.

How to configure a softphone

- Configuring the X-Lite software phone
- Configuring the Ekiga (Gnome Meeting) software phone
- Configuring the SJphone software phone
- Configuring the Acrobits Groundwire software phone

Configuring Kerio Operator Softphone for mobile devices

Overview

Kerio Operator Softphone is a software phone client for Android and iOS. Kerio Operator Softphone works with Kerio Operator or any other SIP based VoIP service.

Kerio Operator Softphone supports auto-configuration with Kerio Operator.

Do not use wildcard certificates. Kerio Operator Softphone follows the RFC 5922 standard.

System requirements

For Kerio Operator Softphone system requirements, see the Kerio Operator product pages.

Installing Kerio Operator Softphone

You can install Kerio Operator Softphone from:

- Google Play on Android
- Apple App Store on your Apple iPhone

Configuring Kerio Operator Softphone

Contact your system administrator who must configure your account.
If you use an SSL certificate created by your Kerio Operator server, see Using the self-signed certificate from your Kerio Operator server.

1. Tap the Kerio Operator Softphone icon on your device.
2. In the **Provisioning Url** field, type the Kerio Operator domain name.
   Use the following format: `https://address`
3. Type your Kerio Operator username and password.
   Use the same credentials as for the Kerio Operator Softphone interface.
4. Tap **Login**.

The account is fully configured and you can make a call.

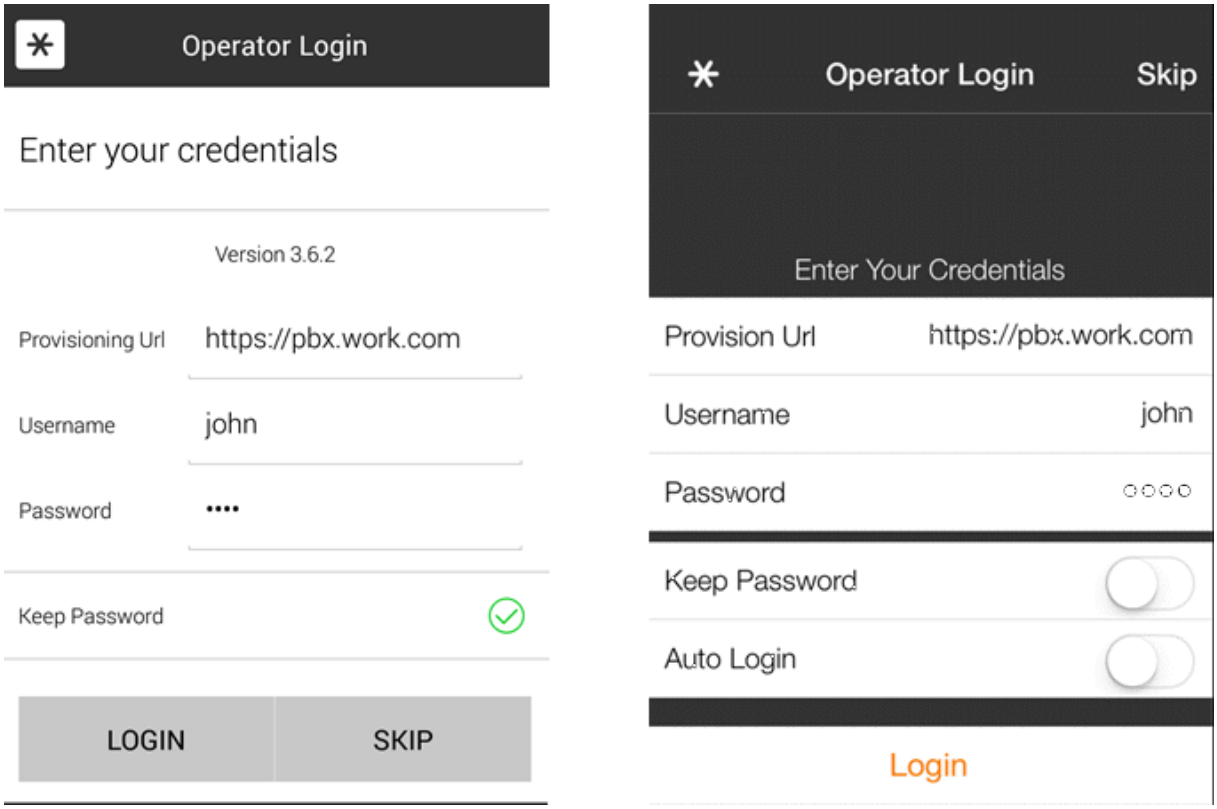


Figure 1 Login to Kerio Operator Softphone on your Apple iPhone or Android

Using the self-signed certificate from your Kerio Operator server

If you use a self-signed certificate created in your Kerio Operator server, you must manually download and install the certificate on your device:

1. In the browser on your device, go to Kerio Operator Softphone.

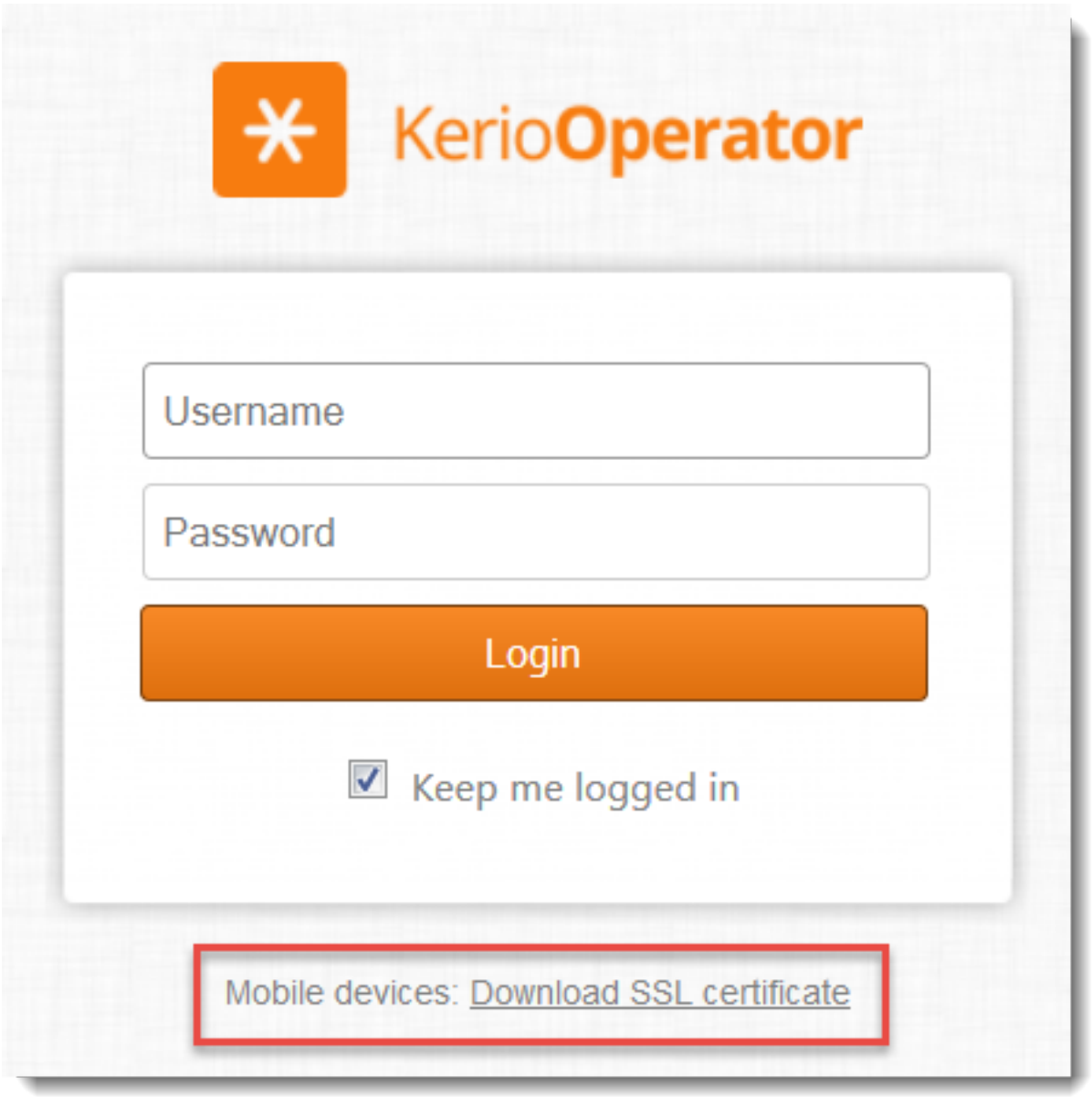
   For more information, see the Kerio Operator Softphone section in the **Logging into Kerio Operator** article.

2. Tap **Download SSL certificate**.

   If the downloading fails, see the SSL certificate troubleshooting section.

3. Install the SSL certificate.

You can then log into Kerio Operator Softphone.



SSL certificate troubleshooting

If the downloading of the SSL certificate fails:

- Use the Firefox web browser to download the certificate.
- Modify the URL for logging into Kerio Operator Softphone to the HTTP version. The format of the link is `http://kerio_operator_hostname/server.cer`
- (Admins only) Use paid certificates signed by a certification authority.

Configuring mobile data network

By default, only Wi-Fi connection is allowed on mobile devices. If you want to use a mobile data network:

1. In Kerio Operator Softphone, go to **Settings** → **Preferences**.
2. In the **Mobile Data Network** section, allow **Use When Available**.
3. In the same section, select the **Allow VoIP Calls** option.

You can now connect via a mobile data network.

Configuring the X-Lite software phone

Configuring X-Lite

Before you start:

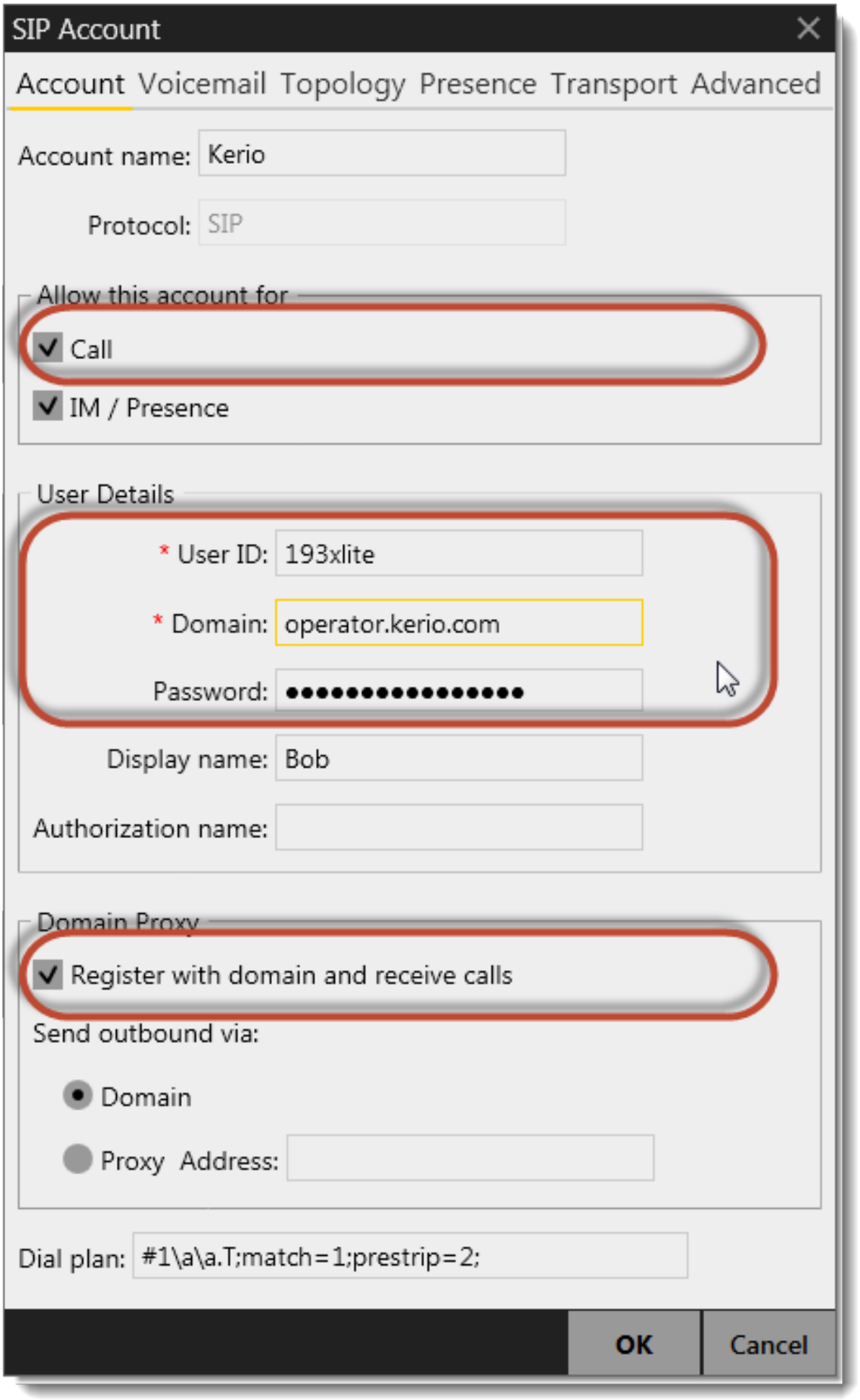
- install the softphone on your computer,
- collect any information necessary for connection of the phone.

Tested on X-Lite 4.7

1. Run the X-Lite application and wait for the softphone to display on your screen.
2. Click **Softphone** → **Account Settings**.
3. The **SIP Account** dialog box opens.
4. Select **Call** (see 1).
5. In the **User ID** and **Password** fields, type your SIP username and SIP password (see article Creating extensions).
6. In the **Domain** field, type IP address or DNS name for the computer where the PBX is running.
7. Select **Register with domain and receive calls**.

   Otherwise incoming calls rings only on your harwdware phone.

Now, you can call for X-Lite to any phone number.


SIP Account
Account
Voicemail
Topology
Presence
Transport
Advanced
Account name:
Kerio
Protocol:
SIP
Allow this account for
Call
IM / Presence
User Details
* User ID:
193xlite
* Domain:
operator.kerio.com
Password:
Display name:
Bob
Authorization name:
Domain Proxy
Register with domain and receive calls
Send outbound via:
Domain
Proxy Address:
Dial plan:
#1\a\a.T;match=1;prestrip=2;
OK
Cancel

Configuring the Ekiga (Gnome Meeting) software phone

Configuring the Ekiga software phone

It is supposed that:

- you installed the softphone on your computer,
- you already have any information necessary for connection of the phone.

Tested on Ekiga 3

1. Run the application and wait for the softphone to display on your screen.
2. On the toolbar, go to **Edit** → **Accounts**.
3. In the **Accounts** dialog box, click **Add**.
4. This opens the dialog where a new phone account can be created.

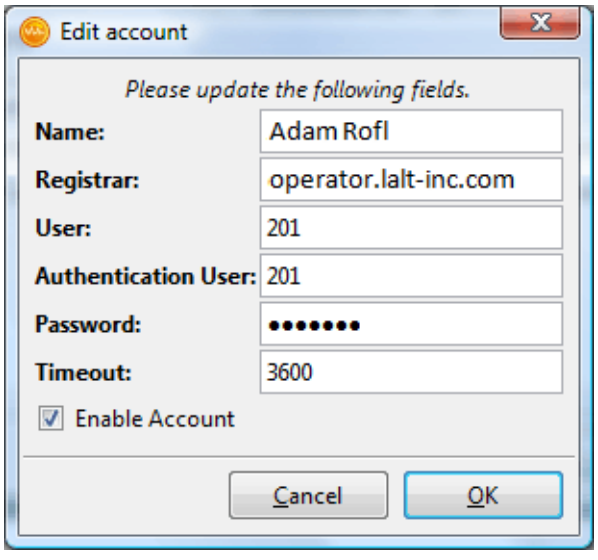


Figure 1 Account settings dialog

5. In **Registrator**, type IP address or DNS name of the PBX.

6. In entries **User** and **Password**, type the SIP username and SIP password for your account provided by your administrator (see article Creating extensions).

Configuring the SJphone software phone

Configuring SJphone

It is supposed that:

- you installed the softphone on your computer,
- you already have any information necessary for connection of the phone.

Tested on SJphone 1.60

1. Run the application and wait for the softphone to display on your screen.
2. Click **Menu** (see figure 1).
3. Menu with options is displayed. Click **Options**.
4. On the **Profiles** tab click **New**. This opens the **Create New Profile** dialog where it is required to enter any profile name (you can use your username, for example). Save the profile.
5. This opens the **Profile Options** dialog. Go to the **SIP Proxy** tab and enter IP address or DNS name of the *Kerio Operator* PBX.
6. On the **Initialization** tab check options **Account**, **Password** and **Caller ID** (see figure 2).

Figure 1 Softphone SJphone

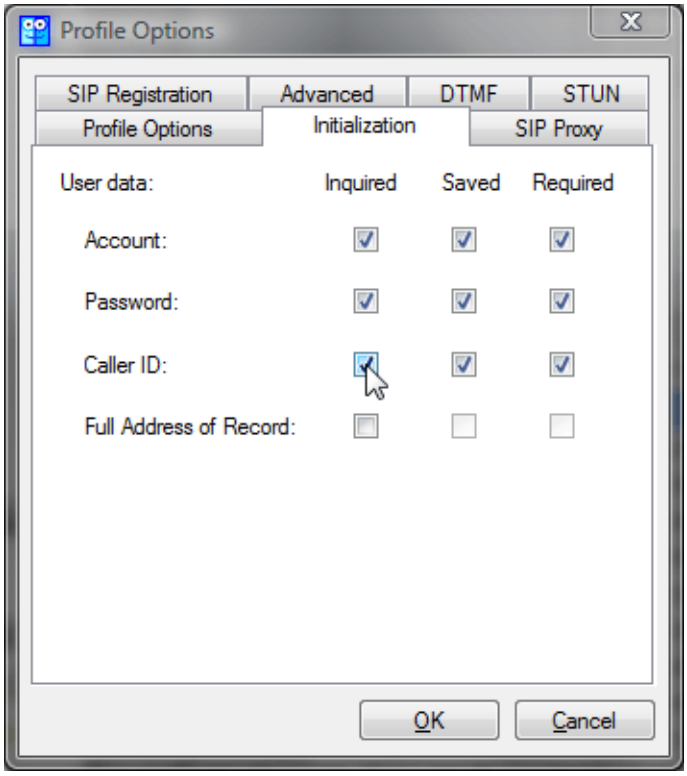


Figure 2 Profile Options → Initialization

7. Dialog asking for authentication details and phone extension gets opened automatically (see figure 3). In entries **Account** and **Password** specify your username and the SIP password associated with the extension and in the Caller ID field enter the SIP username assigned by your network administrator (see article Creating extensions).

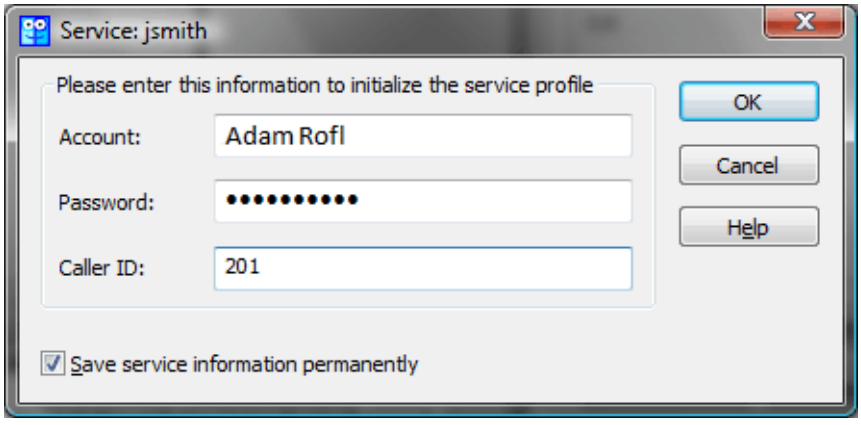


Figure 3 Profile Options —

Configuring the Acrobits Groundwire software phone

Configuring the Acrobits Groundwire software phone

It is supposed that:

- The SIP phone has been already installed on your *Apple iPhone*,
- you already have any information necessary for the phone configuration.

1. Run the application and wait for *Groundwire* to display on your screen.
2. Click the **no accounts** button located at the top-left corner of the phone.
3. In **Settings**, select **SIP accounts**.
4. Under **SIP accounts**, click + to add a new account.
5. Type a name of the account in **Title** (e.g. `Kerio`).
6. In **Username** and **Password**, type your SIP username and SIP password.

   The SIP usernames/passwords do not correspond with usernames and passwords for Kerio Operator Softphone. Using SIP usernames and SIP passwords describe the article Creating extensions.
7. In **Domain**, specify IP address or name of the DNS server where *Kerio Operator* is running.
8. In **Display Name**, insert your phone extension number.

Using Kerio Operator App for Salesforce

Kerio Operator App overview

This article helps you use Kerio Operator App for Salesforce. If you need to install and configure Kerio Operator App for Salesforce, go to Salesforce integration with Kerio Operator .

Kerio Operator App for Salesforce enables:

- click-to-dial
- displaying contacts, accounts and leads during the call
- logging calls into Salesforce

Login to Kerio Operator App for Salesforce

Dialing of numbers is available to all users who use a software or hardware phone which has an extension of the Kerio Operator PBX configured. If the telephone is connected, it is possible to dial the called number using Kerio Operator App for Salesforce.

Before using the Kerio Operator App for Salesforce, you will be prompted to login:

1. Login to Salesforce, go to **Home**.

   You can see Kerio Operator App for Salesforce (see figure 1).

2. To login to Kerio Operator App for Salesforce, type Kerio Operator credentials (the same credentials as for Kerio Operator Softphone).

3. Click **Login**.

If you succeed, the application is open and the extension is idle (see figure 2).

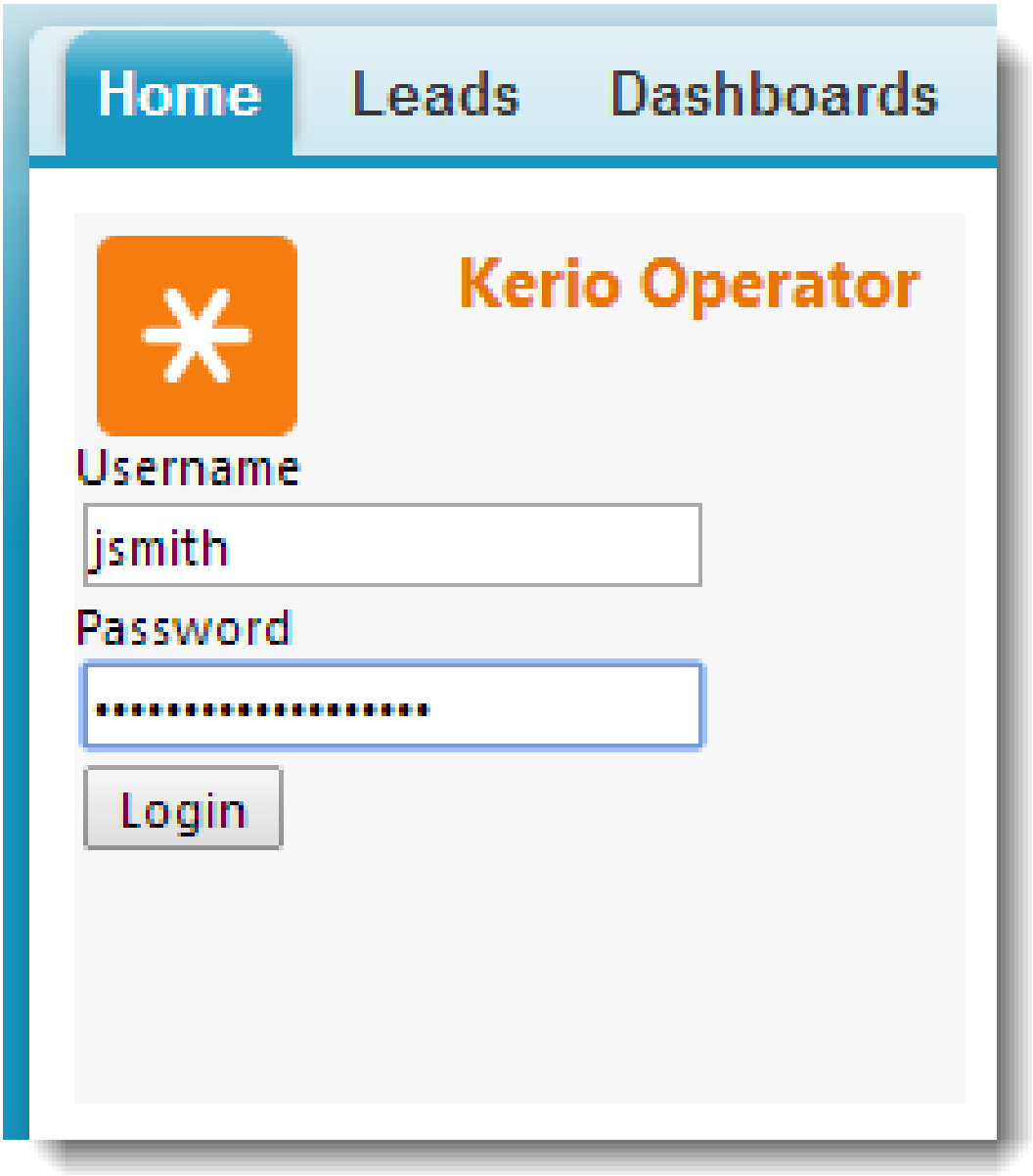


Figure 1 Kerio Operator App for Salesforce on Homepage

Figure 2 A successfull login with a registered extension

If your extension is offline, you have not registered phone extension. You should do the following:

- If you have more extensions, change the extension (click your name and select the extension)
- Check that your phone is working
- Contact your system administrator.

Dialing calls (click-to-dial) from Salesforce

To dial the number, click any number marked as a phone number (see figure 3).

Dialing in Salesforce works on a callback basis. This means that Kerio Operator App for Salesforce connects directly with the PBX and the PBX contacts back your phone. Therefore, the side effect of this operation is that upon clicking on **Dial**, your phone starts to ring as well as the called person's one. Pick it up and wait for the called person to answer.

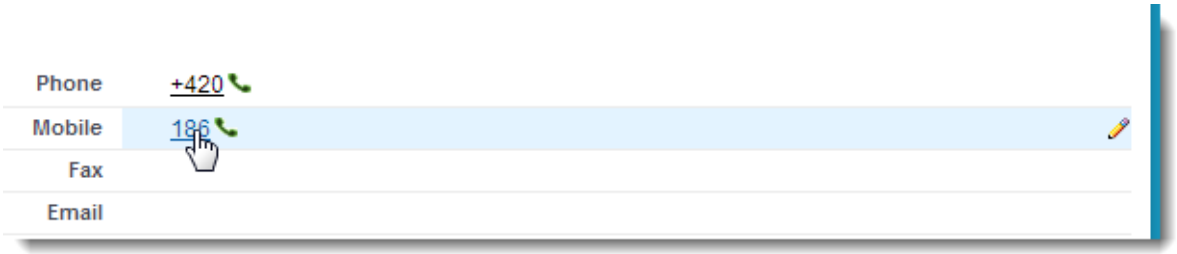


Figure 3 The phone number

If the phone icon is gray, used extension is offline. Check that your phone is working or change an active extension.

Displaying contact, account or lead during the call

Kerio Operator App for Salesforce can log all incoming and outgoing external calls. The call history (last five calls by default) appears directly in Kerio Operator App for Salesforce (see figure 4). When you click on an item connected with the phone number (it can be an account, contact or lead), the item appears and you can see the details of the caller.

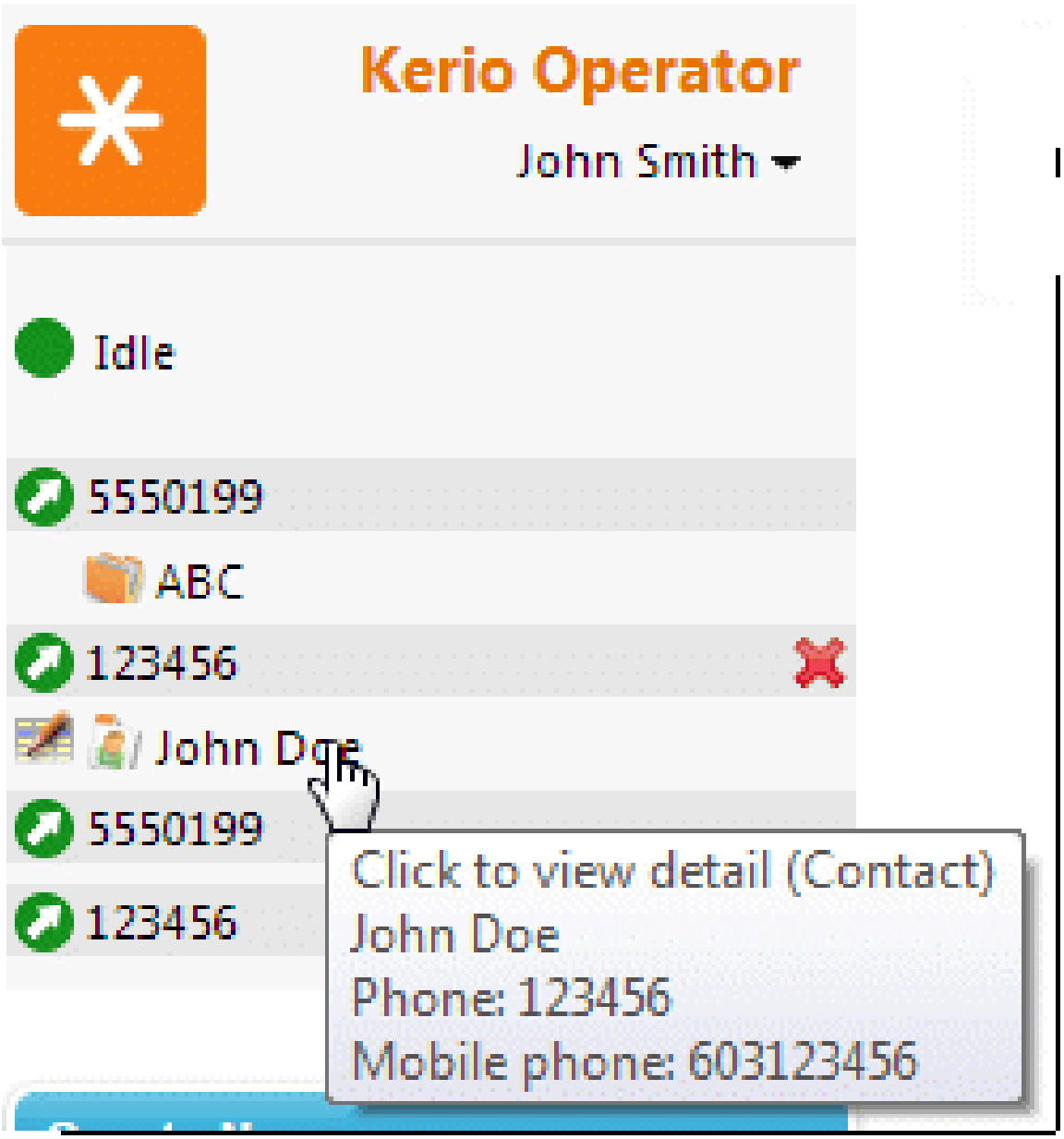


Figure 4 Click to view detail

Call logging in Salesforce

You can log incoming and outgoing calls to the **Activity History** in Salesforce.

1. In the Kerio Operator App for Salesforce, move your cursor onto contact, account or lead (see figure 5).

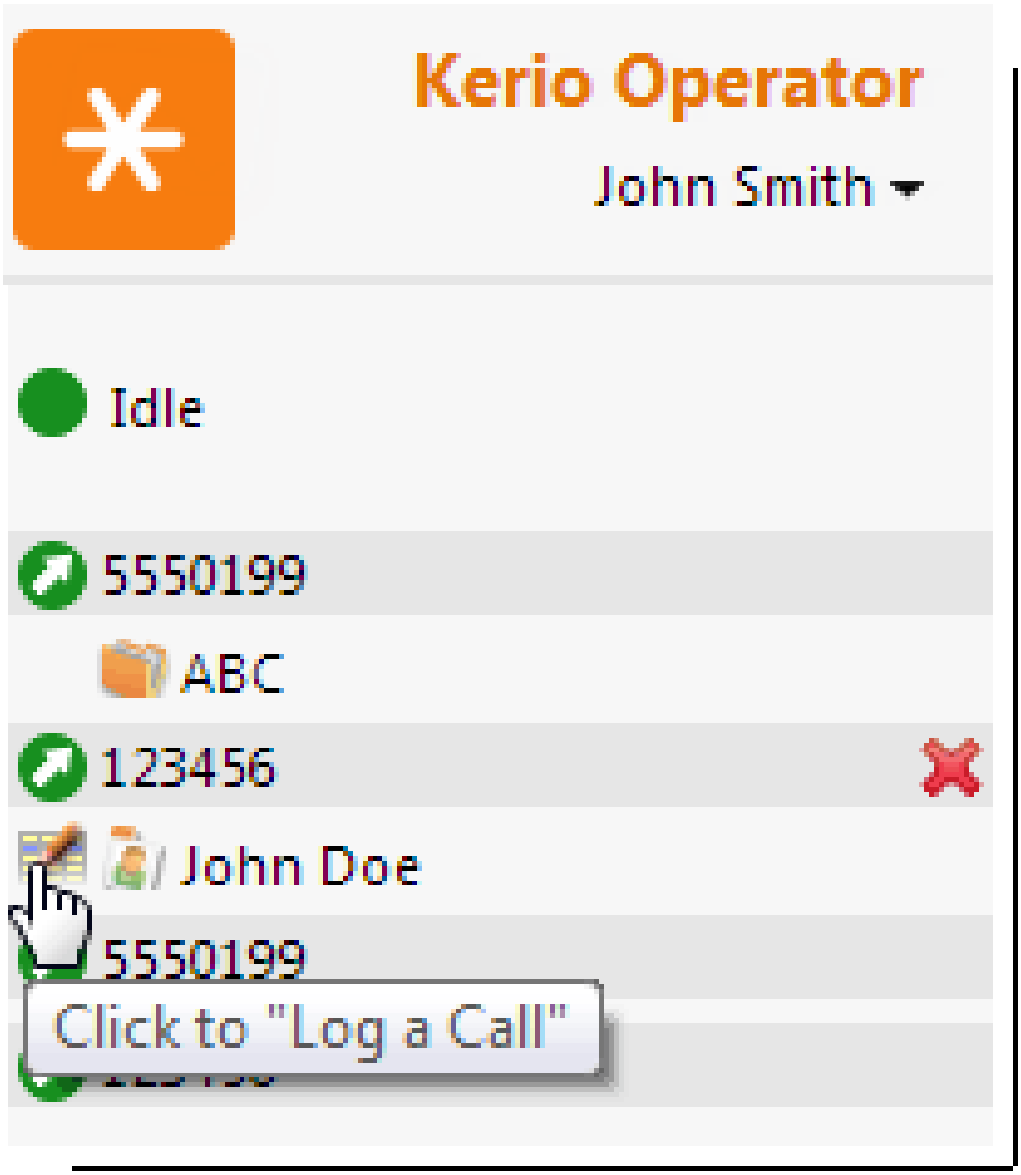


Figure 5 Click to “Log a call”

2. When a text **Click to "Log a Call"** appears, left-click.

   The **Log a Call** page appears (see figure 6).

You can edit a task immediately.

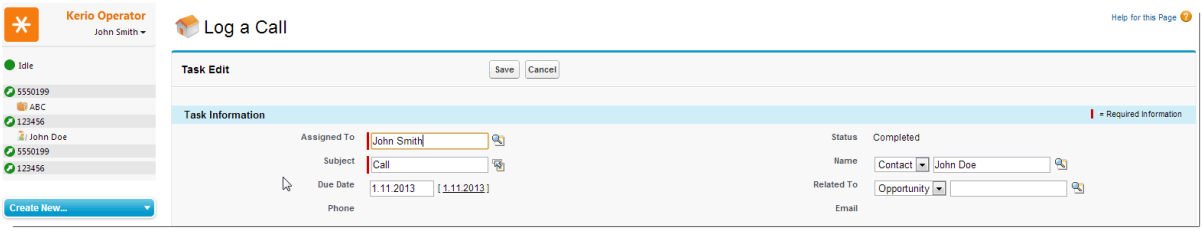


Figure 6 Log a Call dialog

Advanced settings

Changing prefixes

If you need to change a prefix, click your name and select **Dial out prefix**.

If you are required to dial a prefix for outgoing calls, you can configure the Kerio Operator App for Salesforce to automatically prepend dialed numbers with a prefix. If you need to assign a prefix, click your name and select dial out prefix.

Changing a language

If you need to change a language of Kerio Operator App for Salesforce, click your name and select **Change language**.

Opening Kerio Operator Softphone from Kerio Operator App

If you want to open Kerio Operator Softphone directly from Kerio Operator App, click your name and select **Open Kerio Operator Client**.

The advantage is that you do not have to fill the credentials twice.

Configuring a time zone

Salesforce time zone should be consistent with your computer:

1. In Salesforce, go to **My Settings** (see figure 7).

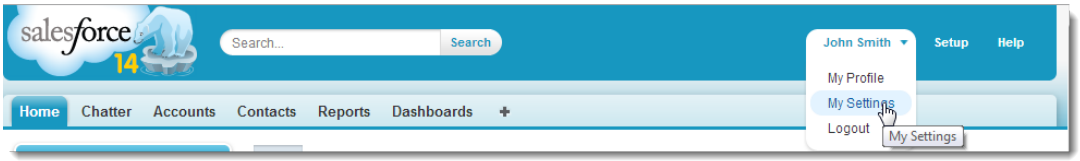


Figure 7 My Settings

2. Click **Personal**.
3. Click **Language & Time Zone**.
4. Change the time zone and save the settings.

Using Click to Call for Kerio Operator plugin for Chrome and Firefox

Click to Call for Kerio Operator plugin overview

New in Kerio Operator 2.3!

Click to Call for Kerio Operator allows you to dial any phone number in Chrome and Firefox browsers.

Click to Call for Kerio Operator provides the following features for users whose phone is connected to the Kerio Operator PBX:

- The plugin detects phone numbers in the web page and makes them clickable.
- The detection of phone numbers is enabled/disabled by clicking on the extension's icon.
- The detection of phone numbers is repeated when the web page changes.
- You can select the phone number manually and then dial it from the context menu (right-click on the selected text).

If you want to use Click to Call in Kerio Connect Client, go to the Integrating Kerio Connect and Kerio Operator article.

Installing and configuring the Click to Call for Kerio Operator plugin for Chrome

Kerio Operator does not need any configuration, however, users must configure the Click to Call for Kerio Operator plugin.

Follow these steps to install the Chrome version of the plugin:

1. Open the following link in the Chrome browser:

   Click to Call for Kerio Operator

2. Install the plugin.

   A configuration dialog appears after the installation.

3. In the configuration dialog, type the Kerio Operator URL.

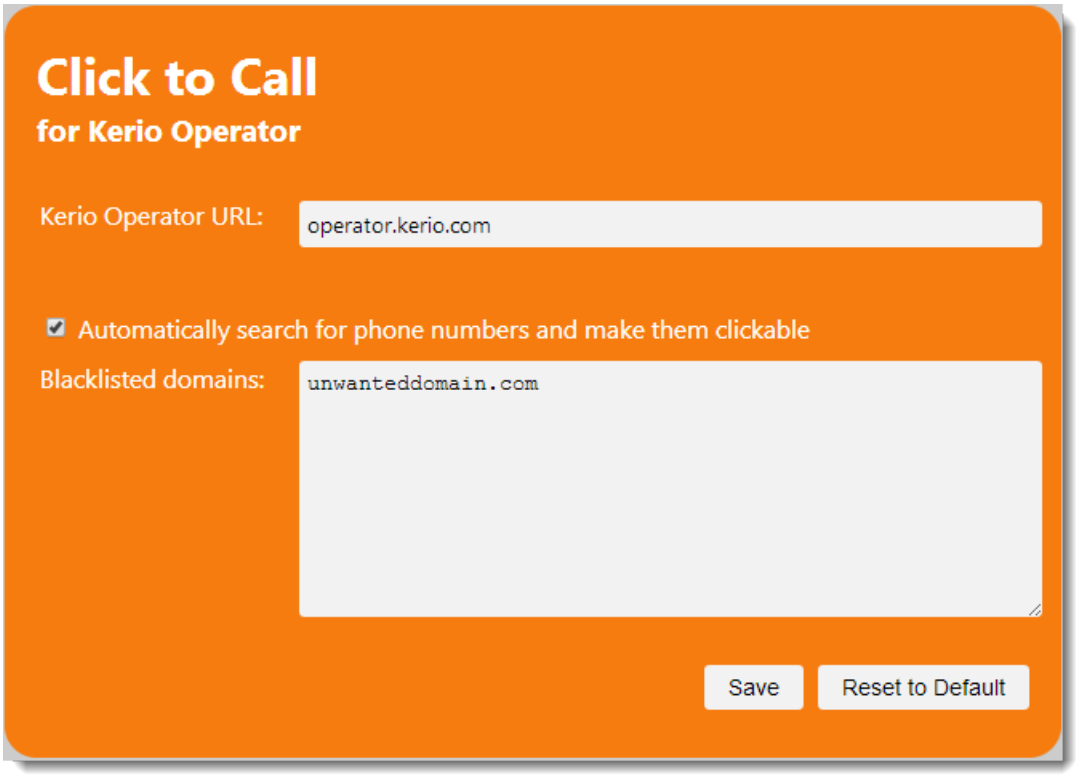


Figure 1 Click to Call for Kerio Operator

If you want to display the configuration dialog later, right-click the **Click to Call for Kerio Operator** icon placed next to the address bar and select **Options**.

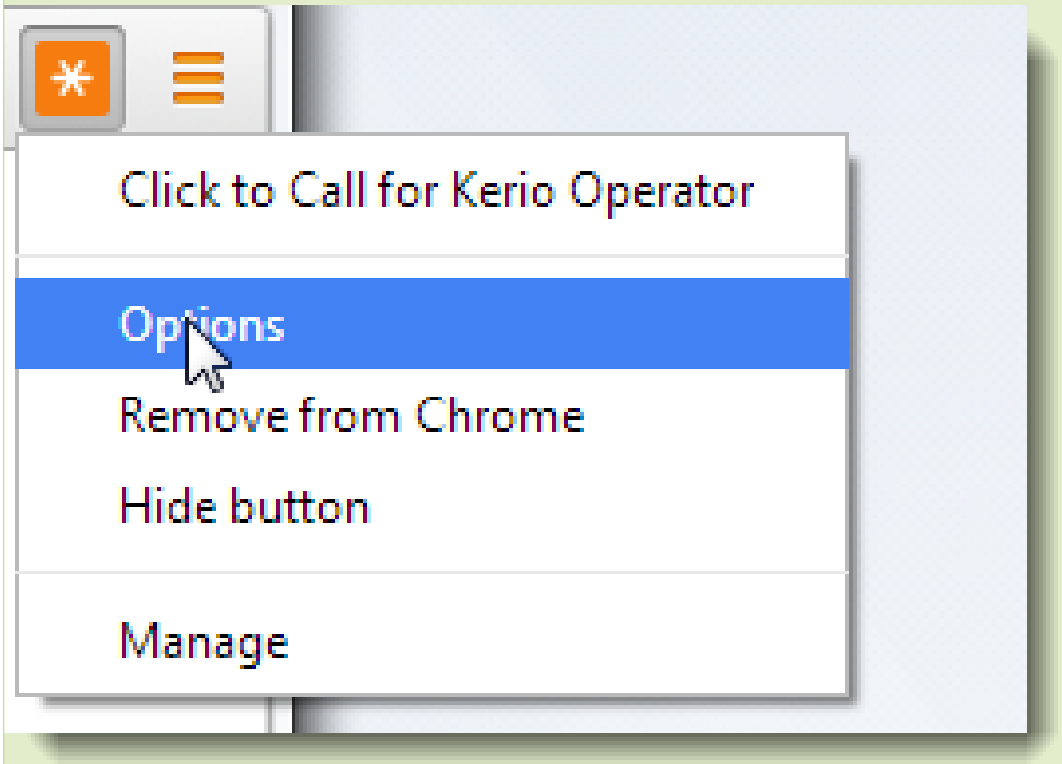


Figure 2 Click to Call for Kerio Operator context menu

4. Check the **Automatically search for phone numbers and make them clickable** option.

   This option enables/disables the Click to Call for Kerio Operator plugin.

5. If you know some websites, which should not use the Click to Call for Kerio Operator plugin, type the URLs into the **Blacklisted domains** field.

6. Click **Save**.

Click to Call for Kerio Operator is configured.

Configuring the Click to Call for Kerio Operator plugin for Firefox

Kerio Operator does not need any configuration, however, you have to configure the Click to Call for Kerio Operator plugin.

Follow these steps to install the plugin:

1. Open the following link in the Firefox browser:

Click to Call for Kerio Operator

2. Install the plugin.

   The plugin appears on the Firefox **Extensions** after successful installation (type `about:addons` in your browser).

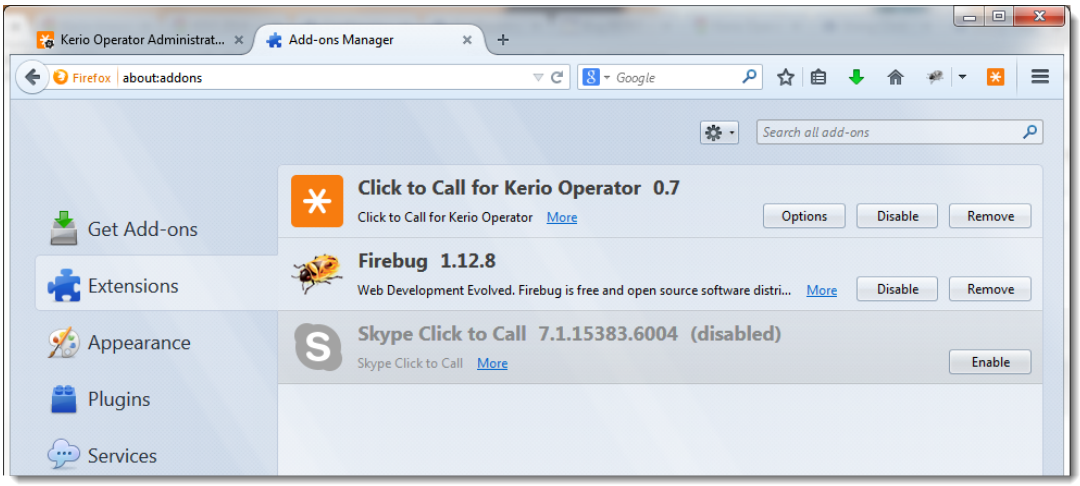


Figure 3 Firefox Extensions

3. Click **Options**.

4. In the configuration dialog, type the Kerio Operator URL.

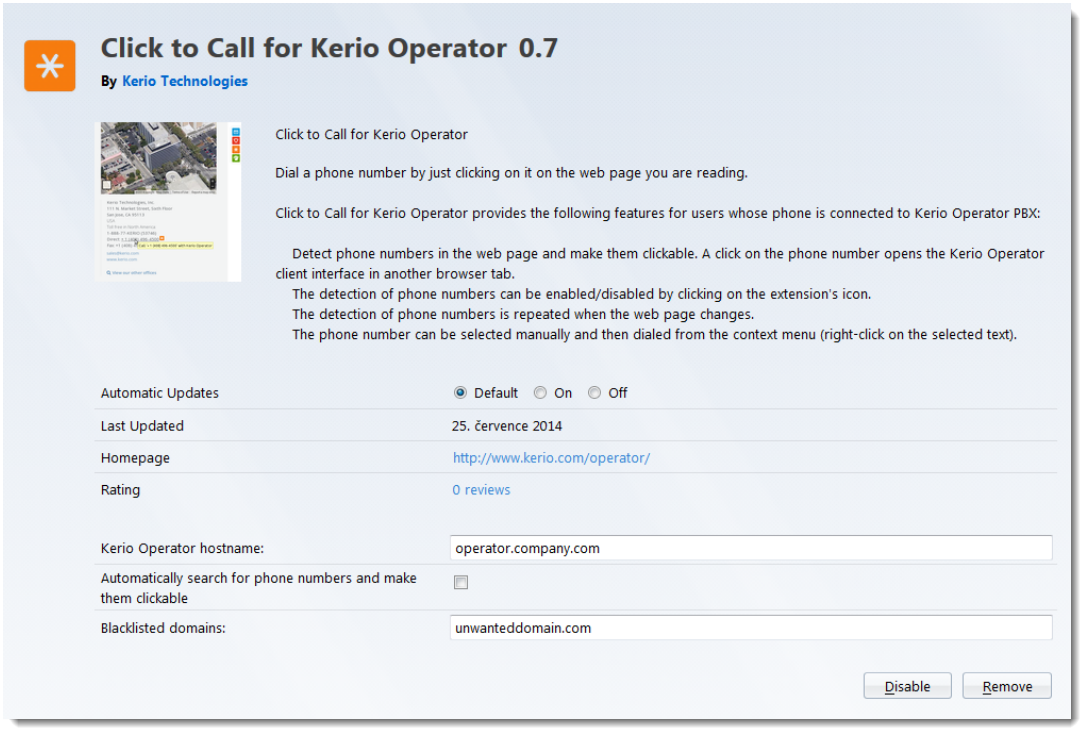


Figure 4 Click to Call for Kerio Operator — Options

5. Check the **Automatically search for phone numbers and make them clickable** option.

   This option enables/disables the Click to Call for Kerio Operator plugin.

6. If you know some websites, which should not use the Click to Call for Kerio Operator plugin, type the URLs into the **Blacklisted domains** field.

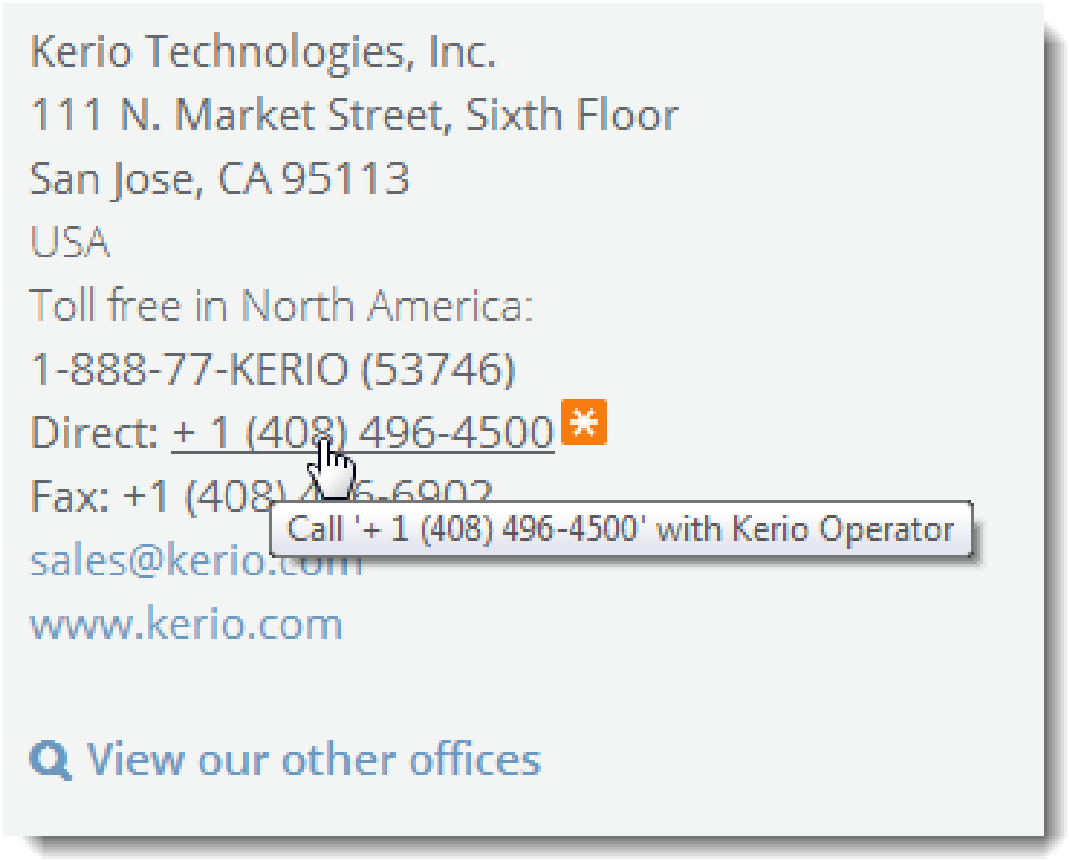
7. Click **Save**.

Click to Call for Kerio Operator is configured.

Using the Click to Call for Kerio Operator plugin

Click to Call for Kerio Operator plugin allows you to initiate a call from Kerio Operator using Chrome and Firefox browsers:

1. Double-click the phone number marked with Kerio Operator logo.



2. The browser opens the Kerio Operator Softphone interface in another browser tab. The phone number is predefined.

3. Click **Dial**.

   Dialing in the Kerio Operator Softphone works on a callback basis. Kerio Operator Softphone connects directly with the PBX and the PBX contacts back your phone. Your phone starts ringing as well as the called person's one. Pick it up and wait for the called person to answer.

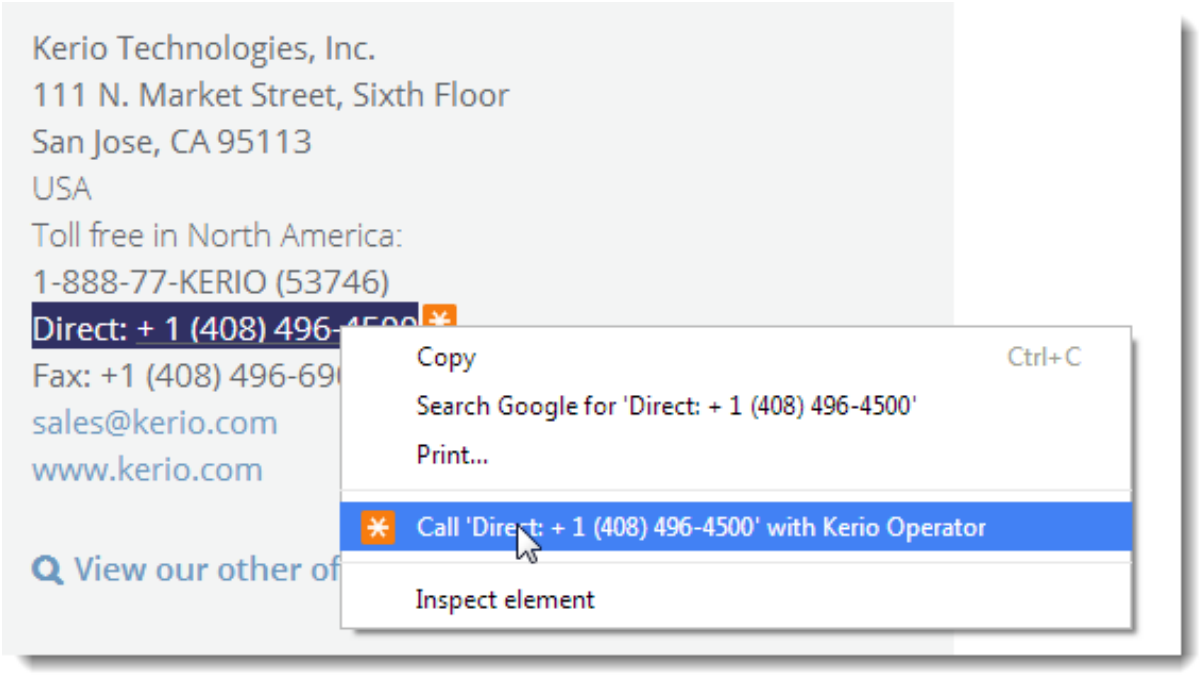
Enabling/disabling Click to Call for Kerio Operator

To enable/disable Click to Call for Kerio Operator, click Kerio Operator icon in the browser (see figure below).

Selecting the phone number manually

You can select the phone number manually and then dial it by right-click on the selected text (see figure below).

The context menu option is available even if the plugin is disabled.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Copy
Ctrl+C
Search Google for 'Direct: + 1 (408) 496-4500'
Print...
Call 'Direct: + 1 (408) 496-4500' with Kerio Operator
Inspect element

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