Business

Odido Essential app (iOS).

Manual v1.2.

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1. Introduction.

The Odido Essential Mobile Client is a mobile phone app, that allows you to communicate and collaborate with your colleagues and other (external) parties easily and efficiently. The app allows you to use the functions of your PBX on your phone you are able to work more efficiently. You can quickly and easily start a call from any phone using your fixed number. You can send short messages to your colleagues via chat, set your own availability, and check the availability of your colleagues. After reading this manual you will be familiar with all the features and possibilities of the app.

The manual is separated into two sections:

1. Installation of the app
2. Use and functions of the app



2. Installing the app.

Installing the Odido Essential app is a very simple two-step process.

Step 1. The welcome sms.

Once your user profile has been created by the telecoms administrator, you will receive a welcome SMS.

> **Please note:** If you have activated the option Mobile VoIP, you will receive an e-mail instead of an SMS containing the installation data and the activationcode.



Step 2. Download and install.

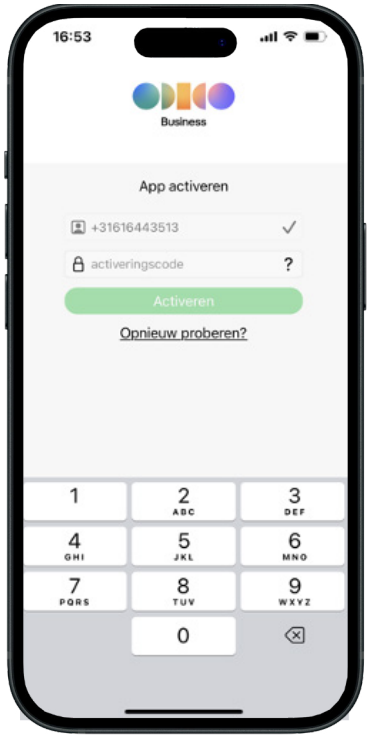
Search for ‘Essential’ in the store or click on the download link in the email that you have received from sender noreply@odido.nl with the subject line ‘Inloggegevens Odido Business Essential’.

Please note: You need iOS 10 or higher to download this app.

Step 3. Configure.

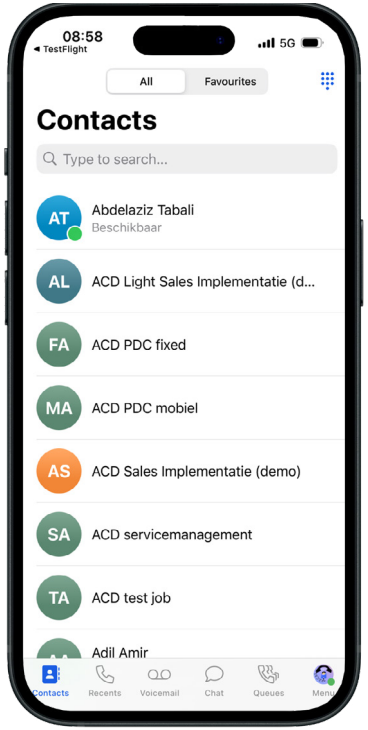
Open the app and enter your mobile phone number.
Tap **“retrieve activation code”.** You will almost instantly receive an SMS with an activation code. Enter this code and tap **“activate”.** There is no need to set a password, your profile will be configured automatically. Congratulations! The app has been installed and you are ready to get started!





3. The main screen.

After opening the app, you'll see an overview of your contacts. This is the main screen. You can use the 'bottom navigation bar' to access the app's other features. Under the Menu tab, you'll find shortcuts to all features, options to update your status, and the app settings.





4. Contacts.

This menu is synchronized with the contacts in your smartphone and with colleagues that use the app. If you have not given permission to synchronize contacts, the contacts from your smartphone's phonebook will not appear in the app.

Search contacts.

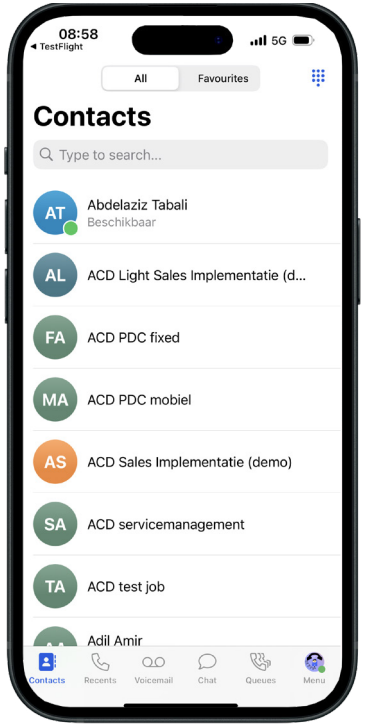
The first thing you see when you open the app is a list of all your contacts. At the top of the screen, you'll see a Favorites tab, with a search bar just below it.

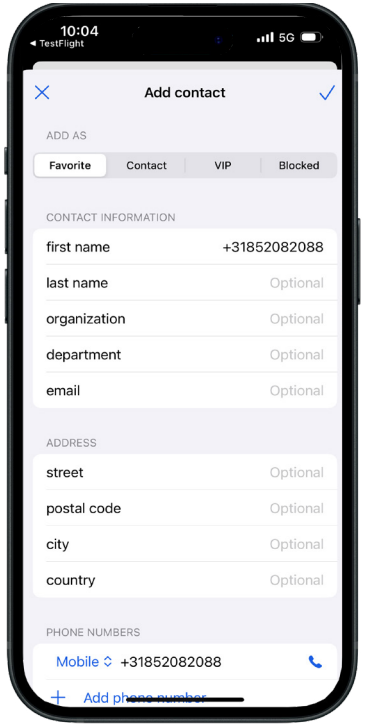
To find an existing contact, enter their name in the search bar. The matching search results will then appear.

Add contact.

You cannot add a contact directly from the contacts screen. To do so, go to the Recents tab. You now have two options:

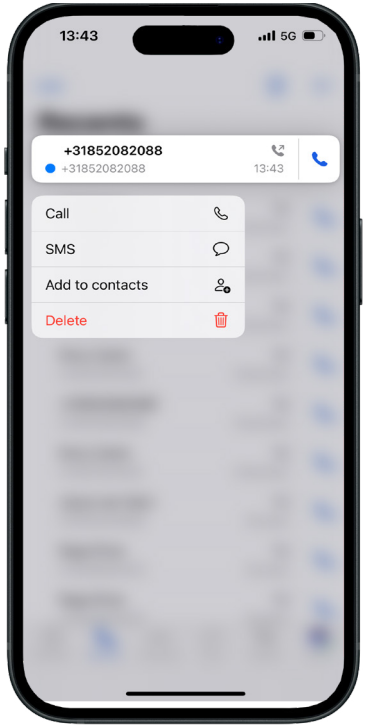
- Tap a recently called number, then tap the + icon in the top-right corner and enter the contact's details.
- Press and hold the number in your call history, then select Add to Contacts.
- You can then tap the star icon in the top-right corner to assign the contact a category. The available options are Favorite, Contact, VIP, or Blocked.

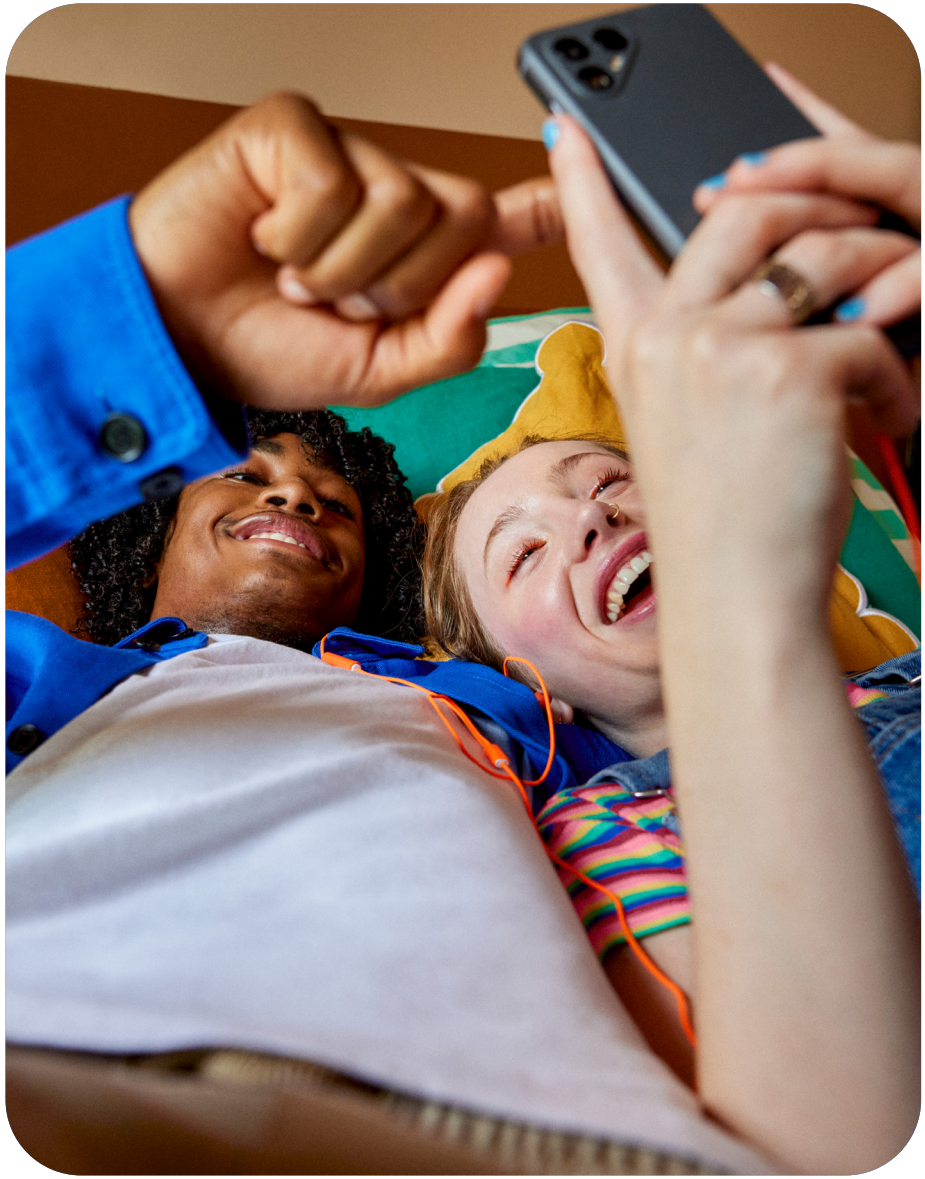




Getting in touch.

To get in touch with a contact, press and hold on the contact while searching.





5. Dialer.

You can use the dialer to call numbers that are not stored in your contact list. You can find the dialer at the top right of your screen, in the Contacts tab. When you tap the dialer icon, your number pad pops up. Manually enter a phone number and tap the green phone button to make a call. You can also paste copied numbers here. During an ongoing call, you can mute the sound, put the call on speakerphone, add a call or put a call on hold. If you add a call, you can switch between the calls. The other call will then be on hold.

To close the dialer, tap the arrow at the bottom of your screen.

Please note: Mobile VoIP works on data (Wi-Fi or mobile data connection) from a provider other than Odido. Ensure a good WiFi or mobile data connection for a well-functioning Mobile VoIP.

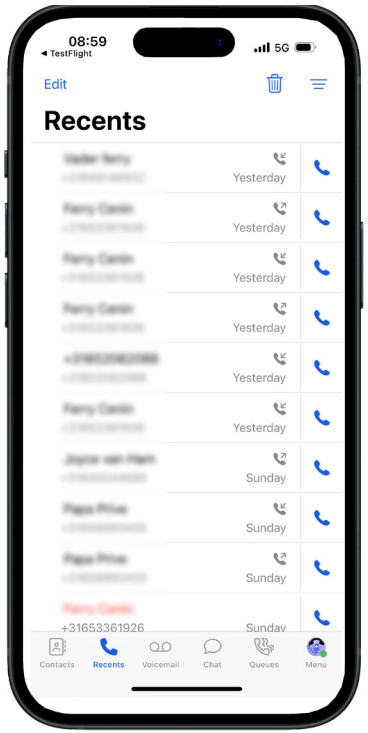


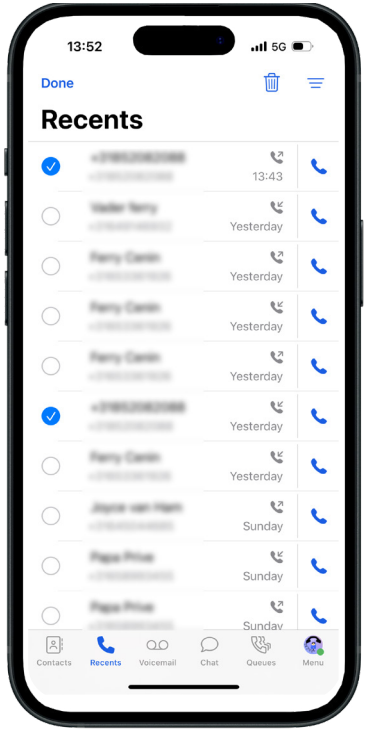
6. Call logs (Recents).

Under the Recents tab, you'll find your call log, which displays your answered and missed calls in chronological order. Tap the phone icon next to a number or contact to call that person back immediately. Tapping the number or contact itself opens a details screen. From there, you can add the number to your contacts, make a call, send an SMS, and view all incoming and outgoing calls associated with that number or contact.

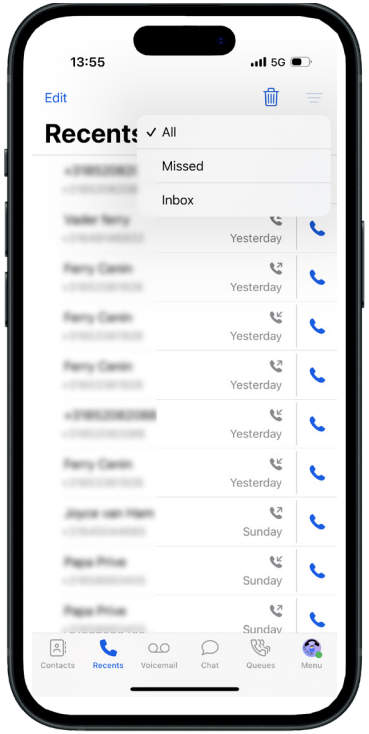
> Please note: If you have activated the Mobile VoIP option, only calls to and from the landline number will be displayed here. Calls to and from the mobile number are recorded in your mobile device's call log.

To clear your entire call log, tap the trash icon in the top-right corner. To delete specific calls, tap **Edit**, select the numbers you want to remove, and then tap the trash icon.





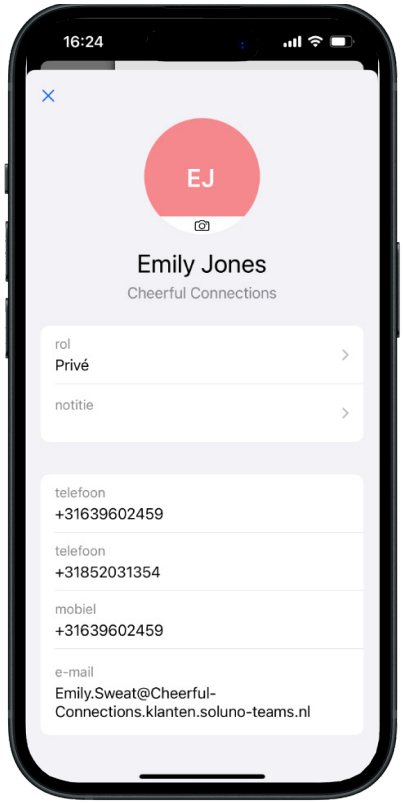
By default, the overview displays all calls. Tap the icon with three horizontal lines in the top-right corner to filter by All, Missed, or Inbox.





7. Me.

In the right menu above you can manage your personal information. Depending on your personal settings, the user interface in the image below may differ from the one you are presented with.



Photo

Tap to add a new photo. You can take a photo directly with the camera or choose one from the phone's photo gallery.

Note

Tap the text field to enter a note using a keyboard. This will be visible to your contacts.

Email

This is the e-mail address associated with your account.

Role

Here you can set your role as either business or private. This does not affect your caller ID.

Mobile

This is your mobile phone number.

8. Voicemail.

If you have purchased the additional **‘Visual Voicemail’** option, it will be visible in the bottom navigation.

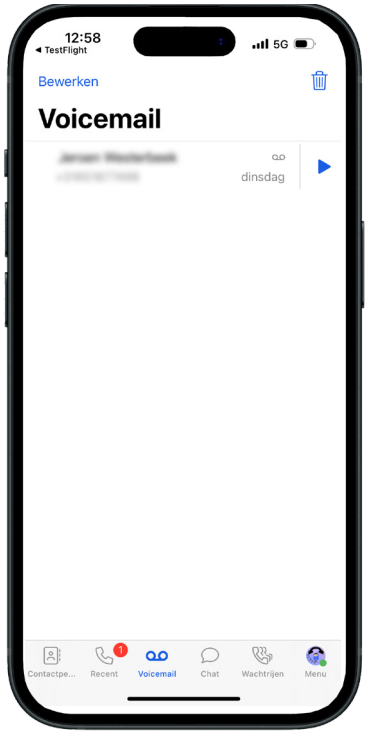
Voicemail.

You can find all voicemail messages here. You can see at a glance who left a message, from what number, on what date and for how long the message lasts.

You can listen to the voicemail via the **‘play’** button. While playing the voicemail message you can also pause and/or fast forward the voicemail message. If you want to delete a specific message, tap the **‘Edit’** button in the top left corner. Select the desired message and tap the delete icon in the top right corner.

If you want to delete all voicemails, tap the delete icon in the top right corner. If you do not have visual voicemail, you can listen to your voicemail by calling 1233.

Please note: If you have activated the option Mobile VoIP, only voicemail messages from the fixed number are visible here. The voicemail messages from the mobile number are accessible via the mobile operator. Listening to voicemail messages without visual voicemail? Call 1233 via the Essential app.



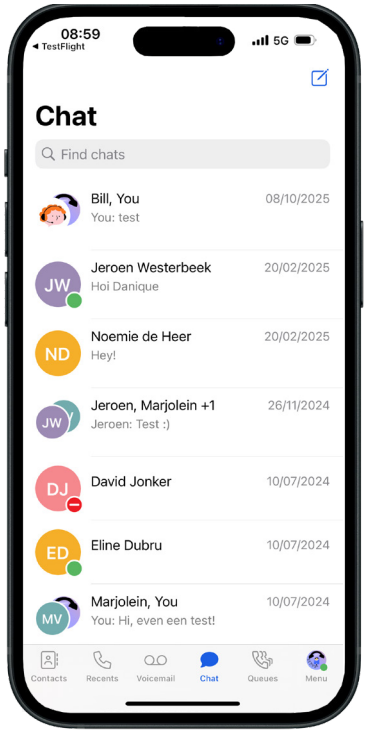


9. Chat.

In the Chat menu you can chat with your colleagues who also use Business Essential. Convenient if you want to ask a quick question or discuss something.

General.

- You can chat with someone individually (1-on-1) or create a group chat.
- Private messages can be sent and received with text, emojis and web links.
- View the status of chat messages: sent, delivered or read. This is always clearly visible, along with the timestamp of each message.
- View your colleague's presence and line status and make calls directly from the chat.
- Click web links in messages to open them immediately in your default browser.
- If you long-press on a message balloon, you can copy its entire contents.
- When you have an unread message, you'll get a notification.



Individual chat (1-on-1).

Starting an individual chat.

- Starting an individual chat can be done in 2 different ways. Directly via a contact in your contact list or via the Chat function in the left menu. It works like this:
- Click on the edit icon at the top right and choose New Message.
- Find your contact via the search bar and select it.
- The chat is created and the conversation window opens immediately. You can now start chatting.

Groupchat.

Starting a group chat.

- Click Chat in the left menu.
- Click the edit icon in the upper right and select Create Group.
- Click the image icon to add an image (not required).
- Want to give the group chat a name? Enter it in the name field (not required).
- Click Add Participants to add contacts to the group chat.
- Ready? Click the check mark at the top right of the screen to create the group chat. You can start chatting right away.

Delete, leave or edit a group chat.

- In the chat view, long click on the group chat you want to delete, leave or edit. Right-clicking the info button in the chat view is also an option.



10. Queues (ACD Groups).

If you have purchased the additional **'ACD groups'** option, it will be visible in the bottom navigation.

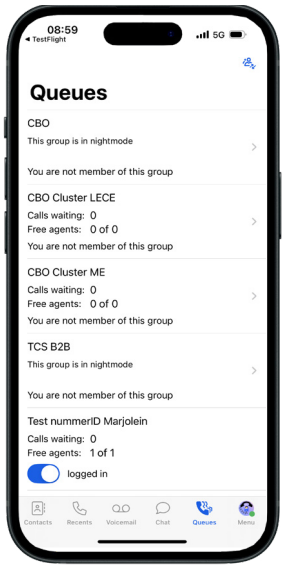
ACD Groups.

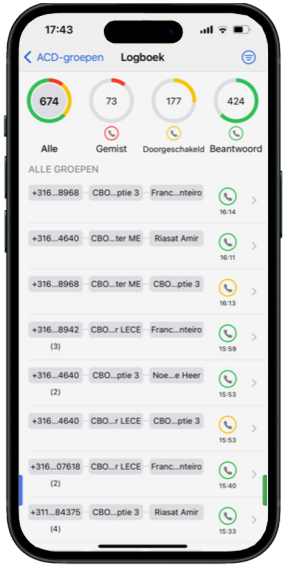
Here you can log in or log out of the ACD group. You can do so by using the slider.

The name of the group is at the top. Here you can also immediately see how many callers are in queue and how many agents are available. Supervisors can click on the ACD group and see which agents are available. They can also log them in or out the group.

The log is available via the arrow icon in the top right corner. Here you can see a clear overview of all calls: those answered, missed and forwarded. You can view specific calls by clicking them. You will then see the length of the queue and the duration of the call.

Please note: If you cannot login then there are probably no more available licenses at that time. Ask a colleague to logout or order extra licenses from Odido.



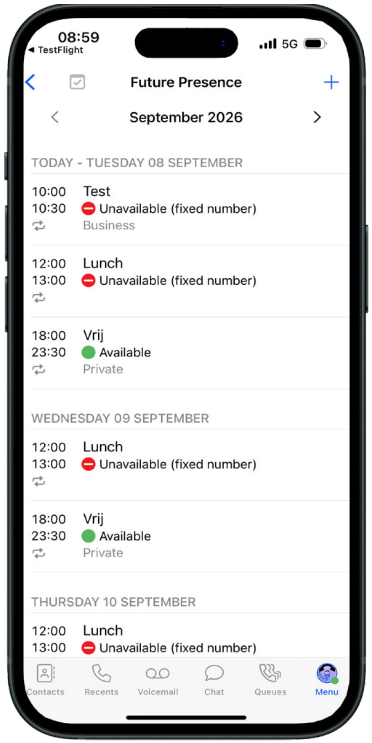




11. Future presence.

You can find Future Presence via the Menu tab. Tap the calendar icon next to your status bar. Under **'Future presence'** you can schedule future events with the corresponding availability. This will automatically change your personal status when the event starts. You can also view and edit your scheduled events here. To do this, tap and hold the event in question.

> Please note: If you have activated the option Mobile VoIP, you can only use this functionality to set the availability of the fixed telephone number.



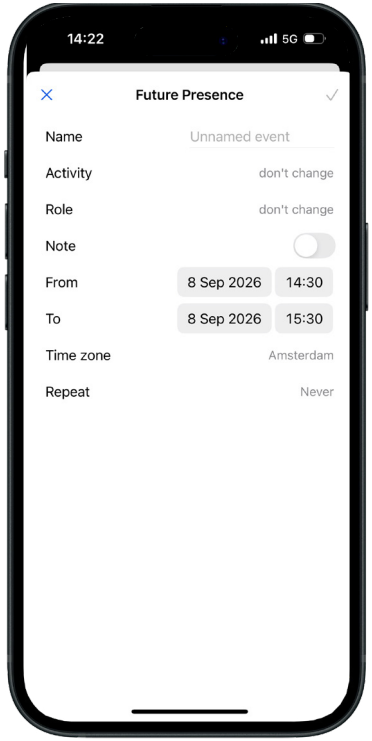
Future presence.

Set your availability by tapping the plus icon. You will then have the following options:

- **Title:** Give the future event a title.
- **Activity:** Set your availability by choosing from the available options.
- **Role:** Choose whether it is a business or private event.
- **Note:** You can make a note here if you wish.
- **From:** Select the start time of the event.
- **To:** Select the end time of the event.
- **Timezone:** The time zone is shown here. By default, this is Amsterdam. If you want to change it, tap it and select the appropriate zone.

- **Repeat:** If desired, you can set up a recurring event. To do so, select one of the following options: Never - Daily - Weekly - Monthly - Yearly.
- **End repeat:** This option is only visible when a repeat is set. Disable repeat by selecting an end date and an end time.

Tap the check mark to create the future event with the corresponding availability. You will see the future event in the main screen of the Presence option and can change it by tapping it.





12. Forward a call.

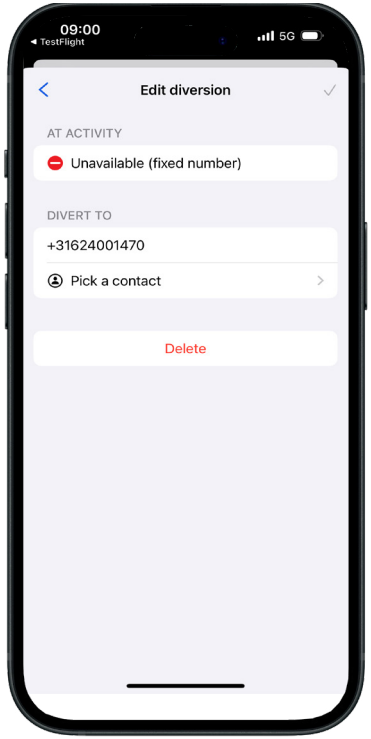
Are you taking a day off or going on holiday and want to forward incoming calls directly to another phone number? You can set this up using the Call Forwarding feature under the Menu tab. Tap None to set up new call forwarding, or tap the phone number to modify an existing setting. There are two ways to configure call forwarding: based on an activity, such as Available or Unavailable. Or based on calls to your landline or mobile number. See the detailed explanation of the 2 options below.

1. Call forwarding based on activity.

Click on Activity at the top of the screen to set up a call forwarding on your fixed and mobile number and then click on the plus sign to set up a call forwarding.

- Choose an “activity” to which you want to link the transfer.
- Under “redirect to”, choose the phone number you want to forward the calls to. You do this by manually entering the phone number or by selecting a contact person.
- Click the check mark to save the setting. Then select the activity in the menu to activate the diversion.



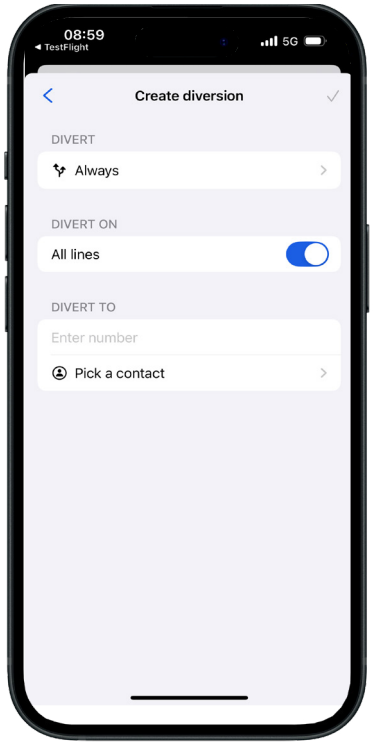


2. Call forwarding based on Call.

Click on Call at the top of the screen to set up a call forwarding for your fixed or mobile number and then click on the plus sign to set up a call forwarding.

- Choose when you want to forward: Always, When busy (busy), When not answered, or When not available.
- Under “Divert on” slide the bar to the left if you only want to set up a call forward to the fixed or mobile number.
- Choose the phone number you want to forward the calls to and enter this under your fixed or mobile number. You do this by manually entering the phone number or by selecting a contact person.
- Click the check mark to save the setting. The call forwarding is active.

Please note: If you have activated the option Mobile VoIP, you can only use this functionality to set the diversion for the fixed telephone number.



13. Settings.

In this section you can change various settings.

Call settings.
- Change the settings for a call. Choose here whether you want to place calls directly, or want to be called back first before placing the call.

Call Transfer type.
Select the desired transfer type:
- Always blind transfer: transfers an answered call to a third party without prior announcement.
- Always transfer with consultation: transfers an answered call to a third party, where they first hear who is calling and the reason for the call.
- Ask for every call (enabled by default): if you choose to transfer, you'll get the choice between blind transfer and transfer with consultation.

Diagnostic logs.
Does an error occur in the app? If so, you can send a diagnostic report of it to the app's developer.

VoIP-mode.
Here you can indicate whether you allow internet calls. This functionality ensures that you can place and receive calls via the app. In the network settings you can choose between 'All networks' or 'Wi-Fi only'.

Please note: This functionality must be enabled if you have activated the Mobile VoIP option.



Permissions.
Set permissions per app via App info > Permissions.

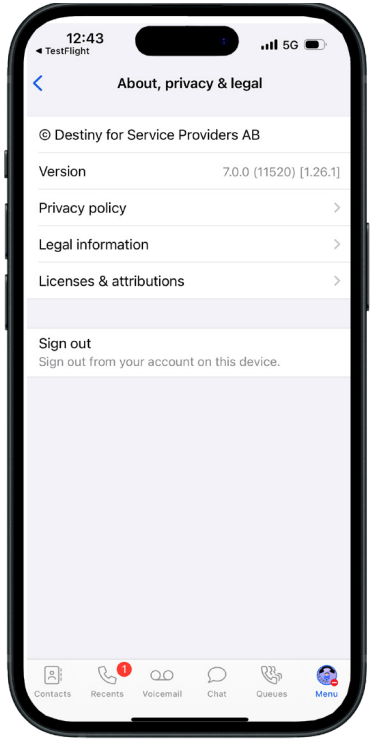
Notifications.
Turn notifications on or off for the four options: All – Chat messages – Presence – Log.

System settings
Here you can indicate that favorite contacts from the app should be visible in the phone's address book.

14. Information.

Here you can find out which version of the app is currently installed.

Tip: Regularly check the Appstore to make sure you are using the latest version of the app.





15. Status view.

You can find your status overview under the ‘Menu’ tab in the bottom navigation bar. Here, you can access various features, such as changing your Caller ID, availability, and/or shortcuts.

Changing your Caller ID.

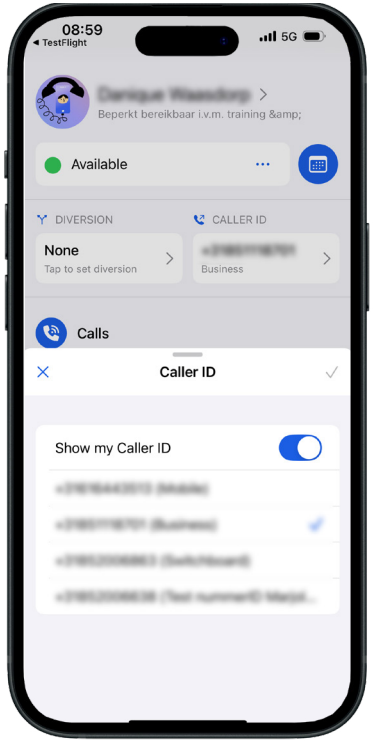
You can find your Caller ID at the top right of the screen. This is the phone number that the person receiving the call sees when you call them. By default, you can dial out with your mobile number, your business fixed number, or anonymously. Optionally, several numbers can be added by the administrator. For example, if you also have the option **‘PBX’,** it is also possible to use that number for outbound calls.

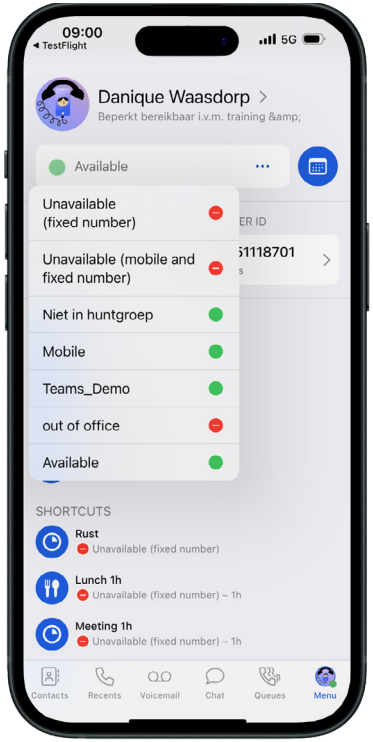
It is easy to set up the number you choose to use in the app, after which you can simply dial out using the normal call function of your phone.

Configuring presence.

With the Essential app, you can simply configure how you want people to be able to reach you. You can set this by changing your activity directly below your username. There are several standard activities such as available, unavailable on your fixed number and unavailable on your fixed and mobile number. When you are unavailable, incoming calls will be forwarded to your voicemail.

You can change the activity by tapping the activity and selecting a desired activity from the menu. Click the three dots if you want to enter an end time for the activity. Click the check icon in the top right corner to save the changes.

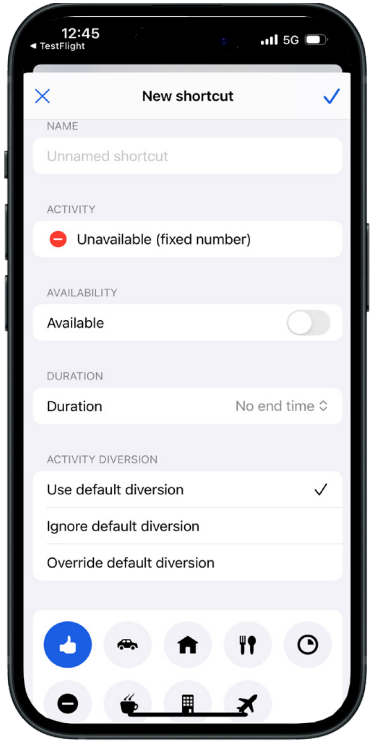




Shortcuts.

You can also create a shortcut for recurring events, such as lunches, meetings or vacations. Click the shortcut to activate these. If you want to create a new shortcut, click **“add new shortcut”** and enter all the relevant information, such as the title, status and duration of the event. Click on the check icon in the top right corner to save the shortcut.

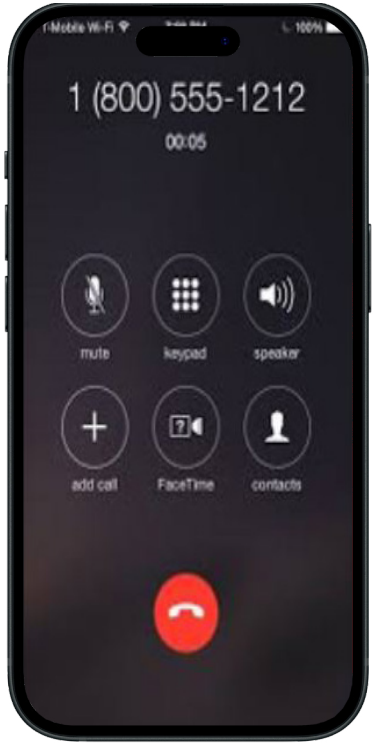
If you select an end time for your shortcut, anyone who calls you will hear your unavailability status. When the end time expires, your availability status will automatically go back to **‘available’**.

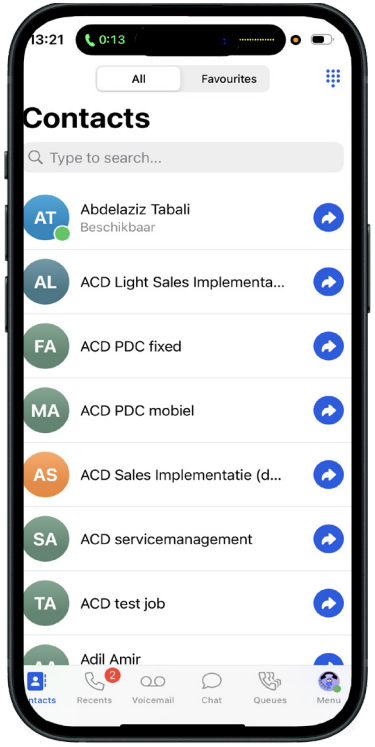


16. Transferring a call.

If you want to put someone through to a colleague, minimize the ongoing call and open the Essential App.

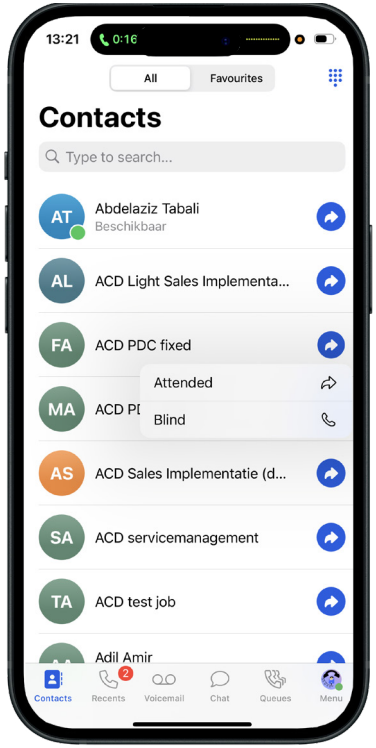
Go to the ‘Contacts’ tab, find the contact you want to transfer the call to, and tap the blue arrow to the right of their name.

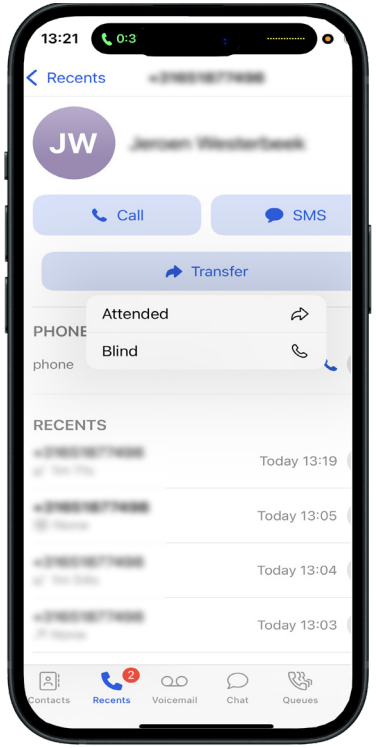




Here you can choose from a blind transfer or an attended transfer. If you select attended transfer you will need to first talk to the person before transferring the call. In this case you will need to call your colleague first. Then tap the red button to disconnect yourself and transfer the call.

You can also transfer the call from a contact's details page by tapping the 'Transfer' button. Then select your preferred transfer type.





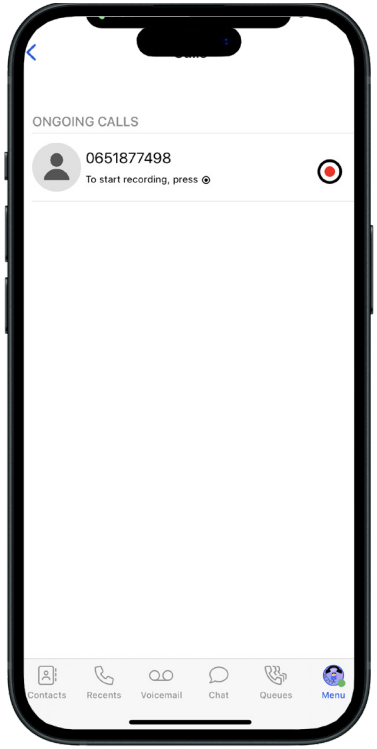
17. Record a call.

Do you have an important conversation that you want to remember, but there is no pencil nearby to write it down? Then use the Call Recording function and record the call.Depending on the license you have enabled, you can record conversations on-demand or automatically.

User without call recording license.

During your call, open the Essential app, tap Menu at the bottom, and then tap Calls. If there is an active call, the phone number of the person you are speaking with will be displayed on this screen. Next to the phone number, you will see a record button. Tap it to start recording. The timer will then begin.

To stop the recording, tap the stop button next to the phone number. Once you have stopped the recording, you will receive an email containing the recording as a WAV file. The recording will also be saved to your inbox, which you can access through your user portal.



User with call recording license.

- **Call recording light user:** if you have call recording automatic, all calls are recorded. No manual handling is required.
- **Call recording premium user:** if you have call recording pro you can choose between always on or on demand. At always on, all calls are recorded and no manual handling is required. If you have on demand, you manually choose when you want to record a call.

This is how you use it:

During your call, open the Essential app, tap Menu at the bottom, and then tap Calls. If there is an active call, the phone number of the person you are speaking with will be displayed on this screen. Here, you will see one button to save the recording and another to pause it.



* Note that you can choose to save the entire call at any time during the call.

All recorded calls are stored in the call recording portal (callrecording.Odido.nl). You can listen to the conversations here. Depending on your rights, you can only listen To your own conversations or multiple conversations.

Questions? We are here to help.

Odido Service: odido.nl/zakelijk/service

Chatbot Izzi: odido.nl/zakelijk/service

Our chatbot Izzi will immediately answer your question.
Can't you figure it out together? Then a colleague takes over from Izzi.

Mijn Odido: odido.nl/zakelijk/login

Are you looking for your login details or do you want to view your details? Please visit Mijn Odido.

Call us:

Questions? Ask! Your contact person at Odido will be happy to talk to you.

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