



## **SIP Soft Phone**

**Printed help**

2018 R2

Last updated 2018-02-26  
(See Change Log for summary of changes.)

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## SIP Soft Phone

### Overview of SIP Soft Phone

Welcome to SIP Soft Phone, an on-screen dial pad that you can use to place and control calls from your Windows desktop using SIP-based (Session Initiation Protocol) communications.

You can use SIP Soft Phone with the CIC client. The SIP Soft Phone is like any other CIC station, so it must be defined in Interaction Administrator and must access the CIC server.

Users of the Interaction Supervisor application can choose to listen to calls on their SIP Soft Phone station. For more information, refer to the Interaction Supervisor Help.

### Audio Device Requirement

When it comes to audio devices, audio quality and personal preference are subjective. When you select a USB headset, choose a quality headset with noise and echo cancellation. You can discuss personal experience with headsets and recommendations from other partners and customers on the Genesys Community Forum at <http://community.inin.com/>.

### SIP Soft Phone Icon, Status, and Menu Options

Once the application is launched, an icon for the SIP Soft Phone appears in the notification area of the Windows taskbar.

#### SIP Soft Phone Status

To display the current status of SIP Soft Phone (connected or disconnected from the server), move the mouse pointer over the icon.

**Not Connected - Server Not Available** - This message indicates that the soft phone could not make a connection with the server.

**Connected - (Station)** - This message indicates that the soft phone is connected to the specified station.

For more information, see [Status Display](#).

#### SIP Soft Phone Menu Options

To display the menu options available in SIP Soft Phone, right-click the icon in the notification area of the Windows taskbar.

### The Set-Up Process

Before you can use the dial pad to make or control calls:

- An administrator must define your SIP Soft Phone station in Interaction Administrator. The "SIP Soft Phone Administration" section of the *CIC Managed IP Phones Administrator's Guide* describes the setup and configuration tasks that the administrator must perform.

**Note:** If certain conditions are met and SIP Soft Phone can obtain the necessary information from the server and network, automated provisioning occurs when you start SIP Soft Phone on your workstation. If automated provisioning does not occur, you or an administrator must use the [SIP Soft Phone Provisioning Wizard](#) to step through the simple process of obtaining your configuration

information from the CIC server. If your configuration information is not available on the server, the wizard walks you through the auto provisioning steps where you specify certain information (extension and PIN number) and then the CIC server generates the appropriate configuration and sends it to the phone.

- You must select, configure, and test your headset device in Windows Control Panel. You can also select the headset device **Audio Configuration Options** whenever you change your headset.
- You can [specify the network adapter to use](#) with your SIP Soft Phone. The network adapter options are available in **Network Adapter Options**. Your administrator should tell you which adapter is appropriate for your situation.

## The Dial Pad

Once your phone is successfully provisioned and configured, you can [use the dial pad](#) to do the following:

- Make a call
- Place a call on hold
- End a call
- Mute a call

## Need Help?

To access the online help, right-click the SIP Soft Phone icon in the notification area of the Windows taskbar, and then click **Help** on the menu that appears. The table of contents in the help lists all of the things that you can do with SIP Soft Phone. Index and Search tabs are also available.

## Feedback

The SIP Soft Phone's **About** dialog box enables you to submit feedback, report bugs, request enhancements, and submit other product related information to Genesys. The **About** menu option is available when you right-click the SIP Soft Phone icon in the system tray.

To submit product feedback:

1. Right-click the SIP Soft Phone icon in the notification area of the taskbar, and then click **About**.
2. On the About SIP Soft Phone dialog box, click **Feedback**.

**Note:** You must have internet access to submit product feedback. You can also submit documentation feedback by sending email to [documentation@inin.com](mailto:documentation@inin.com).

**Note:** Customer Interaction Center (CIC) supports two interaction management client applications. This documentation uses the term CIC client to refer to Interaction Connect and Interaction Desktop.

revised 02/26/2018

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**About SIP Soft Phone**

**SIP Soft Phone Features**


The following features are included in SIP Soft Phone:

[Provisioning Wizard](#)

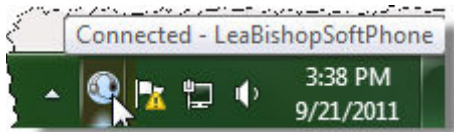
[Status Display](#)

[Dial Pad](#)

## Status Display

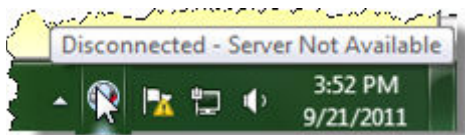
The Soft Phone icon in the notification area of the Windows taskbar () indicates the current application connectivity status.

### Connected



### Disconnected

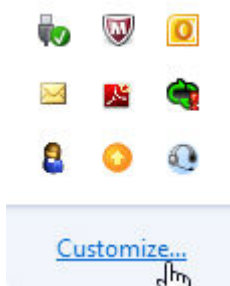
When the Soft Phone is not connected, a red X appears on top of the icon.



## Displaying the Icon on the Taskbar

Windows moves most icons to the notification overflow area. To move the SIP Soft Phone icon back to the notification area of the taskbar so it is easily accessible:

1. Click the **Show hidden icons** icon in the notification area of the taskbar.
2. Click **Customize** in the notification overflow area.



3. Locate SIP Soft Phone in the list and set it to **Show icon and notifications**.
4. Click **OK**.

## Using the Dial Pad



When a call is in progress, the dial pad displays the phone number and the amount of time the call has been connected.

## Making a Call

The dial pad enables you to place a call or send DTMF tones to a connected call. Sending DTMF tones is useful for making selections from an automated telephone menu system.

**Note:** Before you can use the dial pad, you must provision your SIP Soft Phone.

Follow these steps to make a call using the dial pad:

1. To display the dial pad, right-click the SIP Soft Phone icon in the notification area of the Windows task bar, and then click **Dial Pad**.
2. Click the appropriate buttons on the dial pad to dial the number. If you make a mistake, click **Erase** to remove the numbers you clicked one at a time.
3. Click **Dial** to place the call.

## Picking up a Call

**Note:** This functionality will be added in a future service pack.

## Ending a Call

To disconnect a call, click **End Call**.

## Placing a Call on Hold

To place a call on hold, click **Hold**. To retrieve the call from hold, click **Hold** again.

## Muting a Call

To mute a call, click **Mute**. To unmute the call, click **Mute** again.

## Erasing a Number

To erase a single digit when typing a phone number, click **Erase**.



## Starting and Exiting SIP Soft Phone

### Starting SIP Soft Phone

SIP Soft Phone starts up when the user logs on to the CIC client, as long as the user's Station Type is set to SIP Soft Phone. There is no startup splash screen. The SIP Soft Phone icon appears in the notification area of the Windows taskbar and indicates the current [status](#).

When SIP Soft Phone starts, it uses the devices that were configured on the **Options** dialog box or the Windows **Sound** dialog box. If the configured devices are not available, SIP Soft Phone uses the default Windows audio devices.

**Note:** You can change your CIC client station type to **SIP Soft Phone** in the CIC client. See the client help for changing your station. Your SIP Soft Phone must be set up in Interaction Administrator. For more information, contact your administrator.

#### Related Topics:

[Exiting SIP Soft Phone](#)

### Exiting

To exit the SIP Soft Phone, right click on the SIP Soft Phone icon in the notification area of the Windows taskbar, and then click **Exit**.

**Note:** If you exit SIP Soft Phone while it is being used by the CIC client, a warning appears.

#### Related Topics:

[Starting SIP Soft Phone](#)

## Provisioning the SIP Soft Phone

### SIP Soft Phone Provisioning Wizard

The SIP Soft Phone Provisioning Wizard is used to obtain the information that your SIP Soft Phone needs to operate properly. You must complete this process before you can make calls and use a SIP Soft Phone as a SIP endpoint.

**Note:** As a user, you can provision a SIP Soft Phone on any workstation to which you can log in. Customer Interaction Center then uses the correct configuration for the workstation you are currently using. A system administrator can provision any station using their CIC administrator credentials.

To start the SIP Soft Phone Provisioning Wizard, right-click the SIP Soft Phone icon in the notification area of the taskbar, and then click **Provision**.

When the SIP Soft Phone Wizard Welcome screen appears, click **Next**.

The wizard guides you through the following tasks:

- [Obtaining the Configuration File for your SIP Soft Phone](#)
- [Setting the Network Adapter Options](#)
- [Using Auto Provisioning to Configure your SIP Soft Phone](#)

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- [Setting the Network Adapter Options](#)
- [Using Auto Provisioning to Configure your SIP Soft Phone](#)

## Get SIP Soft Phone Configuration

Use this page of the Provisioning Wizard to load the phone configuration file. The configuration file contains information to provision the SIP Soft Phone. There are two ways to load the configuration file. You can:

- Access a DHCP server to automatically discover the location of the phone's configuration file and then upload it.
- Manually enter the server location of the station's configuration file.

If no configuration file is found after you attempt to use one of these configuration methods, the wizard will walk you through Auto Provisioning.

## Automatically Loading the Configuration File

If your administrator has configured the network for SIP Soft Phones, as described in the *CIC Managed IP Phones Administrator's Guide* in the PureConnect Documentation Library, and has created a managed IP phone using your full computer name, as described in the same guide, automated provisioning occurs when the SIP Soft Phone starts on a workstation.

**Note:** An information icon appears next to the **Automatic Discovery** option to indicate if there is a reason that automatic provisioning is not available. Move the pointer over the icon to display either the reason the option is not available or the location of the provisioning server.

If automated provisioning does not start when the SIP Soft Phone starts, follow these steps to automatically find and load the configuration file:

1. Select **Automatic Discovery**.
2. Click **Next** to load the configuration.

**Note:** If there are any errors when loading the configuration, an error message appears on the **Get SIP Soft Phone Configuration** page.

3. Do one of the following:
  - If the configuration loads successfully and you have multiple network adapters, select the appropriate option on the **Select Network Adapters** page of the wizard.
  - If the configuration loads successfully and you do not have multiple network adapters, click **Finish** on the completion page of the wizard.
  - If the configuration file is not available or an error occurs, contact your administrator to fix the problem or try manually specifying the configuration information.

## Manually Specifying the Configuration Information

Follow these steps to manually load the configuration file:

1. Select **Configure Settings**.
2. In the **Phone Provisioning Server** field, specify the location of the configuration file.
3. Click **Next** to load the specified configuration file.
4. Do one of the following:
  - If the configuration file loads successfully and you have multiple network adapter options, specify which network adapter to use on the Select Network Adapters page of the wizard.
  - If the configuration file loads successfully and you do not have multiple network adapter options, then click **Finish** on the completion page.
  - If the configuration file is not available on the server, continue to the [Use Auto Provisioning](#) page of the wizard.

### Related Topics:

[SIP Soft Phone Provisioning Wizard](#)

[Use Auto Provisioning](#)

## Use Auto Provisioning

If the configuration file for your phone is not available on the server, you will need to complete the auto provisioning portion of the Provisioning Wizard. The wizard initiates a call to a CIC server to perform the provisioning. The server then generates the appropriate configuration and triggers the soft phone to retrieve its new configuration.

Follow these steps to auto provision your SIP Soft Phone:

1. On the Use Auto Provisioning page of the [Provisioning Wizard](#), click **Provision**.

2. Following the voice prompts, enter the requested information using the dial pad. You will be prompted for the type of provisioning (by administrator or user), the extension number for the phone, and the PIN number. Administrators will be required to enter both administrator and user information.

The CIC server generates the appropriate configuration and triggers the SIP Soft Phone to retrieve its new configuration.

3. Once the SIP Soft Phone is auto provisioned, click **Next**, and then click **Finish**.

#### Related Topics:

[SIP Soft Phone Provisioning Wizard](#)

[Get SIP Soft Phone Configuration](#)

## Setting Network Adapter Options

The SIP Soft Phone can be configured to use a specific network adapter for Real-time Transfer Protocol (RTP) and SIP communications.

Your administrator can help you determine the appropriate network adapter to use.

**Note:** Specifying a network adapter is optional.

If you have more than one network adapter available on your machine, the **Select Network Adapters** page of the Provisioning Wizard appears during the provisioning process. You can also specify a network adapter after running the Provisioning Wizard.

### Setting Network Adapter Options During Provisioning

The **Select Network Adapters** page of the Provisioning Wizard appears if you have more than one network adapter available on your machine. This is useful, for example, for remote users with both a network connection and a VPN connection. If the user's site requires a VPN connection for the SIP Soft Phone, the user would need to specify that here.

**Note:** If you have multiple network adapters, SIP Soft Phone chooses the one with a private IP address as it presumes that this is a VPN connection.

Follow these steps to specify a network adapter during provisioning:

1. Do one of the following:
  - To select the default Windows network adapter, click **Use my default network adapter**. SIP Soft Phone uses either the previously selected adapter stored in the registry, or whichever network adapter Windows provides first when the list of active, IP-enabled network adapters is requested.
  - To select an RTP or SIP network adapter, click **I use a VPN or another kind of connection. Allow me to select my network adapter**. Select the appropriate adapter under RTP Network Adapter or SIP Network Adapter.
2. Click **Next**.

### Setting Network Adapter Options After Provisioning

To select a network adapter at any time after you have provisioned your phone, see [Configure the Network Adapter](#).

## Auto-Detection of Changes to the Network Adapter

The SIP Soft Phone automatically detects when a selected network adapter for SIP and/or audio connections becomes unavailable or disconnected and then terminates the connections. When the selected adapters become available again, the soft phone establishes the connections again.

### Related Topics

[SIP Soft Phone Provisioning Wizard](#)

[Use Auto Provisioning](#)

## Configuring SIP Soft Phone

### Audio Setup

You can select specific speaker and microphone devices, or choose the Windows default communication devices in the **Audio Configuration** section of the Options dialog box.

### Selecting Audio Devices in SIP Soft Phone

To select the audio devices (headset) to use within SIP Soft Phone, follow these steps:


1. In the **Options** dialog box, click **Audio Configuration**.
2. Do one of the following:
  - Select **Use default communication devices** if you want to use the devices that are specified in Windows as the default communication devices.
  - Select **Use custom device settings** and then specify the speaker and microphone devices you want to use.

**Note:** In most cases the microphone and speakers should be set to a USB headset device.

3. Click **OK**.

**Note:** If your USB headset device comes unplugged during use, the default windows audio devices will be used until the headset is plugged back in.

### Selecting and Configuring Audio Devices in Windows

You can also select and configure your speaker and microphone devices using the Windows Sound dialog box. To access the **Sound** dialog box, right-click the Speaker icon  in the notifications area of the Windows taskbar.

Select and configure your headset's speaker on the **Playback** tab of the **Sound** dialog box. Select and configure your headset's microphone device on the **Recording** tab.

### Set the User Interface Language

If you have language packs installed, you can display the user interface in an alternate language.

#### To select the language for the user interface:

1. In the Options dialog box, click **Language**.
2. From the **Language** list, select the appropriate language for the user interface.

**Note:** Languages only appear in the list if you have language packs installed. If no language packs are installed, the **Language** list is not available.

3. Click **OK**.
4. Exit and restart SIP Soft Phone.

#### Related Topics:

[Audio Setup](#)

## Configure the Network Adapter

The SIP Soft Phone can be configured to use a specific network adapter for Real-time Transfer Protocol (RTP) and SIP communications.

**Note:** Setting a network adapter is optional and can also be done during the [Provisioning](#) process.

To select a network adapter at any time after you have provisioned your phone:

1. Right-click the SIP Soft Phone icon in the notification area of the Windows task bar, and then click **Options** from the menu.
2. From the list of option types, click **Network Adapter**.
3. Select the adapter that best suits the RTP or SIP traffic. Your administrator can help you determine the appropriate adapter.
4. Click **OK**.

#### Related Topics:

[Provisioning](#)