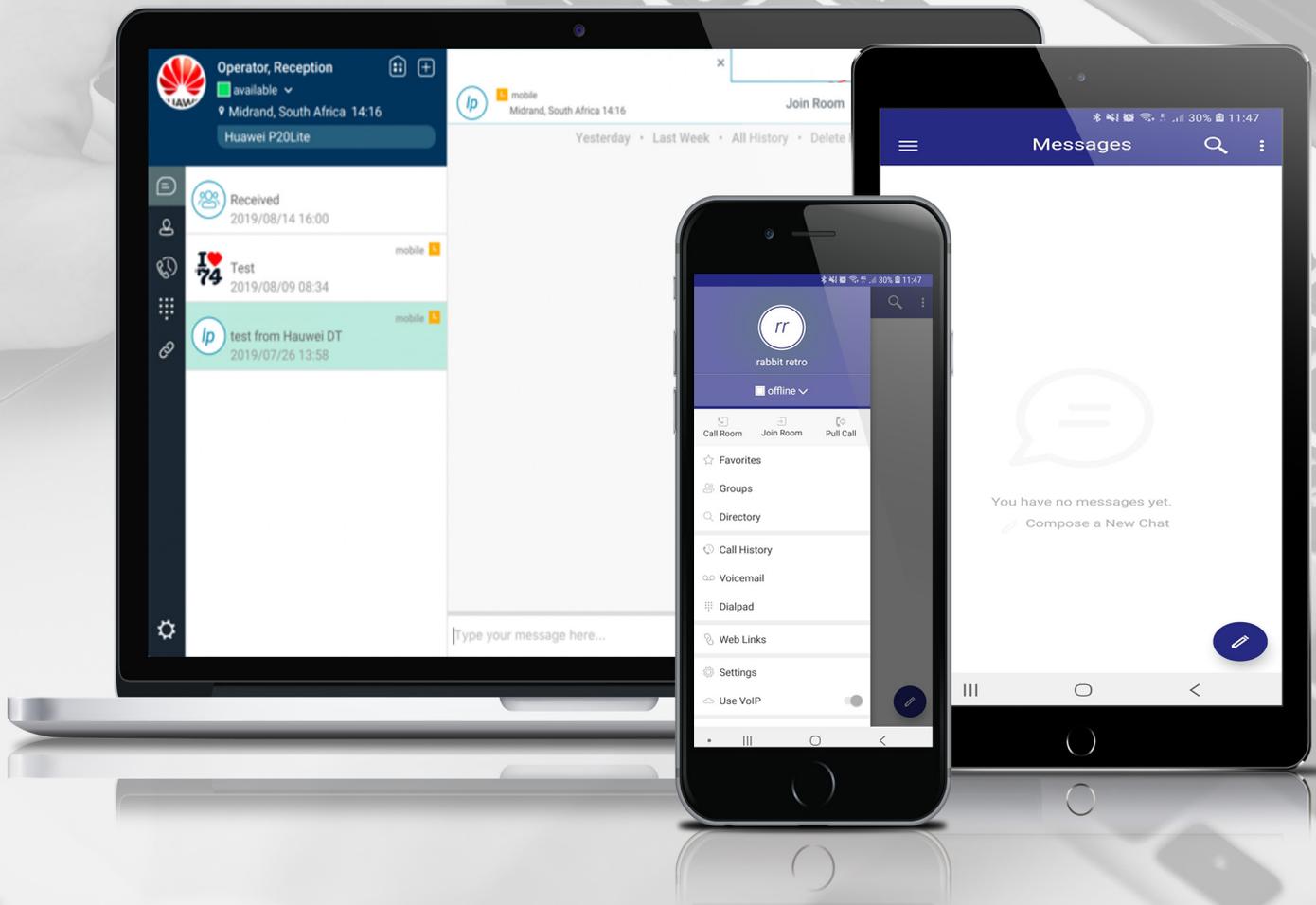




# Converge Desktop

## PC and MAC

### Quick Start Guide





# Contents

<b>1</b> Product Overview	<b>11</b> Send File
<b>2</b> Using this Guide	<b>12</b> Send Email
<b>3</b> Installation	<b>13</b> Make and Audio or Video Call
<b>4</b> Signing In	<b>14</b> Answering a Call
<b>5</b> Main Window	<b>15</b> Active Communications
<b>6</b> My Information	<b>16</b> My Room
<b>7</b> Presence	<b>17</b> Contacts
<b>8</b> Location	<b>18</b> Call History and Voice Mail
<b>9</b> Communications View	<b>19</b> Call Centre Service
<b>10</b> Start Chat	



# 1 Product Overview



**What is Catalytic Converged Unified Communications?**

Catalytic Converge is an intuitive mobile and desktop app optimised for business messaging and calling



## Who is it for?

Ideal for road warriors, business teams, executives and managers, Catalytic Converge keeps mobile professionals fully connected to the workplace with easy access to people and information from their smartphone or PC.

## All the features you need in one app, across multiple devices

**Business calling**

Make and receive business calls over the cellular data network using your business phone number.

**Business messaging**

Stay in touch with colleagues using chat, for quick interactions when it's not convenient to talk

**Access to corporate directory**

Easy access to your corporate directory, enabling you to reach key colleagues in your company.



**Conferencing and collaboration**

Instantly launch and join My Room meetings to collaborate with colleagues and external contacts.

**Move calls**

You can seamlessly pull your active calls from your desktop to your mobile, when you're in transition

**Presence status**

Stay "in the know" of your colleagues' availability status (available, busy, away, or offline), saving you time and eliminating the guesswork from knowing if someone is available for a call or chat.

**Multiple identities**

Ideal for people who use their personal smartphone for business. It uses your business identity and knows if you're calling a customer or a friend. You maintain a professional image, while keeping your mobile number private





## 2 Using this Guide

This quick reference guide will help you gain the most out of your Catalytic Converge App.

We'll cover basics to help you get started right away and we'll give you tips to leverage the range of features and benefits to your business advantage.

For further assistance contact email [support@catalytic.co.za](mailto:support@catalytic.co.za) or call 087 945 0006

## 3 Installation

Your service provider will provide a link to download the installer.

### Windows

- Double-click the installer executable and follow the installation instructions.
- Launch Communicator.

### Mac OS

- Double-click the disk image.
- Copy the application in to the Applications folder.
- Launch Communicator.

## 4 Signing In

Your service Provider will provide you with your sign in username and password.

- 1) Enter your user name and password
- 2) Select whether you would like Communicator to remember your password.
- 3) Select whether you would like Communicator to sign you in automatically.
- 4) Click Sign In.

## 5 Main Window

Avatar Image

Availability

Chat Tab

Contacts Tab

Call History / Voicemail

Dial Pad Tab

New Chats

My Room

Location

Status

Settings Tab

When you start Communicator for the first time, your Contacts list is empty. Use the Search and Dial field to find people and add them to your Contacts list. Contacts can also be added manually by clicking the Add button.



6

## My Information

Double-click or right-click the avatar to upload a picture.

7

## Presence

You can set your presence to a status indicated in the following table:

	available
	away
	busy
	offline

**Tip:** Use the Availability Rules to set automatic call forwarding rules to alternate numbers you are not available to take a call

8

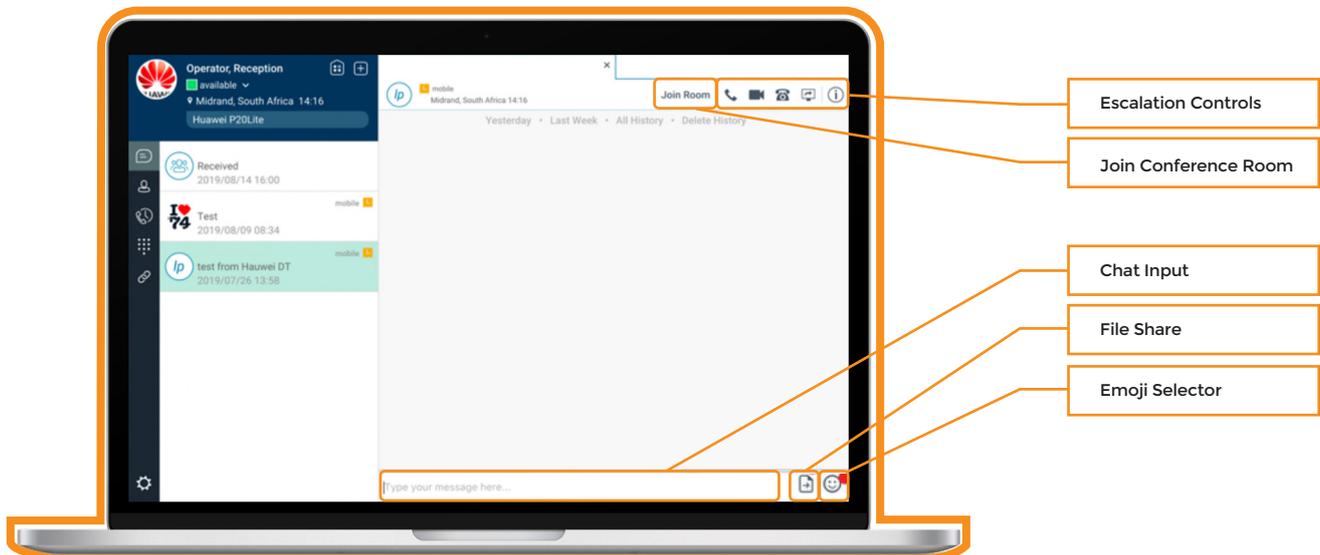
## Location

Your location is automatically determined by your public IP address; however, you can manually set the text to appear for your location and time zone using the location dialog box.

9

## Communications View

After starting communication with one or more contacts, a new tab is displayed for chat. The call window is also integrated with the Main window chat tab by default.

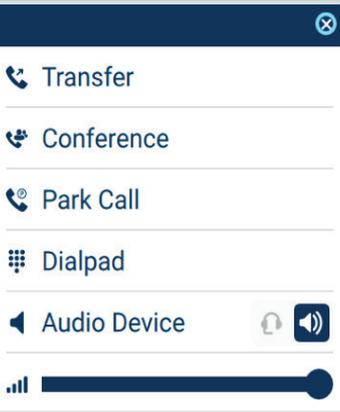




From this view, you can perform the following actions:  
Escalate a chat to include audio, video, and desktop sharing using the escalation icons:



While an active call is enabled further options are provided to:



- End an audio or video call
- Open the dial pad
- Mute your microphone
- Adjust your speaker volume
- Place a call on hold
- Transfer a call
- Toggle between speaker and headset.

17

## Contacts

Contacts are the people with whom you communicate and, in most cases; you see their presence and share your presence with them.

### There are three types of contacts:

- Contacts – Actual people with whom you communicate.
- Conferences – Audio or video conference bridges that you use to communicate with others.
- Groups – Containers of contacts and/or conferences

### Search Contacts:

- To search for a user, type their name or number in the Search and Dial box.
- To add a user to your contacts list right-click on their name and select Add to Contacts.
- The user will receive a message informing them that you wish to share availability information with them. They must accept this request in order for you to see their availability status.

### Add Favorites:

- To add users that you regularly communicate with as a favorite, view their profile and click the Set as favorite icon.

### Add to Groups:

Users can be added to groups as follows:

- Create a new group by clicking the add button and specifying a group name
- From the contacts list right-click on a contact and select Add to Group.



10

## Start Chat

Start a chat tab using one of the following methods:

- Double-click a contact from the Contacts list or search results or Chat History list
- Right-click a contact from the Contacts list and click the Chat item.
- In a Communications window, click the Chat button

11

## Send File

In a one-to-one chat, transfer files by clicking the Send File button in the Communications window or use the “drag and drop” method.



12

## Send Email

Right-click a contact from the Contacts list or search results and select the Email menu option. The contact must have an email address defined for this feature.



13

## Make an Audio or Video Call

Make an audio or video call using one of the following methods:

### From the Contacts Tab:

- Right-click a contact from the Contacts list or search results and select the Call, Call from Phone, or Video menu item.
- Enter a phone number in the Search and Dial field.
  - Press ENTER to start a VoIP call.
  - Click the Call, Call from Phone, or Video button.

### From the Call History Tab:

- On the Call History list, double-click a call entry.

### From the Dial Pad Tab:

- Open the dial pad, enter a phone number, and then click the Call, Call from Phone, or Video button.

### From the Communications window:

- Click the Call, Call from Phone, or Video button.



14

## Answering a Call:

When someone is calling you, a pop-up notification will appear on your screen. You have the following options:

- Answer
- Silence the incoming call, and then open a chat session with the caller,
- reject the call,
- Silence the incoming call by closing the pop-up notification window.

When someone is calling you with a video, you see the same pop-up notification, but with the option specific to video calls.

15

## Active Communications:

While on a call the active communications menu will be displayed providing additional controls for a call.

To end a call:	Press the  button.
To put a call on hold:	Press the  button. To resume the call, press the button again.
To mute a call:	Press the  button. To resume the call, press the button again.
To transfer a call:	Press the  button. Enter the name or number of the user you wish to transfer to and click the Transfer Now button.
To have a 3-way conference call:	Press the  button. <ol style="list-style-type: none"><li>1. Enter the number of the other party and click call. Once the other party has answered merge the call by clicking the  button. This will automatically add all users into a conference bridge share selector window opens.</li><li>2. Select the application to share or the entire screen of a particular display and click the Start Sharing button.</li></ol>



**Tip:** Use the Pull Call feature to pull an active call from one device to another.  
To pull a call to your desktop from your mobile device Press Ctrl+P on Windows or Cmd+P on Mac

16

## My Room



My Room is an always available and permanent room you can use to collaborate with anyone that join using chat, audio/video calling and desktop sharing features.

### How to host a My Room session:

- To host a My Room session click the My Room Icon
- You can invite others to your room by dragging and dropping them from the Contacts list into the My Room tab.
- By default you can only chat with others users in your Room.  
To add audio to the conference all users must click the Call or Video button to automatically dial in to the conference.
- To include users from outside your organization (without the Communicator application) use the email meeting invitation icon in the My Room information area to send an email containing a link to your conference room.
- They can then click the link and join the meeting using the Chrome web browser.
- Guest users must be separately accepted for each session.
- To dismiss a user, right click on contact and select dismiss option.

### To join a My Room Session:

Contacts can join a My Room session with the following methods:

### From the Contacts Tab:

Right-click a contact from the contact list and selecting the Join Room option

### From the Communications window:

Select the Join Room option next to the escalations icons or by following the link from an invitation they have received in a chat.



18

## Call History and Voice Mail

The call history tab is split into 2 sections:



### Call history is shown on the left:

- Calls history displays a list of all recent calls
- Right-click on a call history item to call back or copy the number

### Voice mail is shown on the right:

- Voice mail will list any voicemail messages in your mail box
- Right click on a message to play it back, mark as viewed or delete

19

## Call Centre Service

If your profile has been assigned a Call Centre license you can join a queue and set your availability from the Communicator client.

**Go to the Settings icon and select the Services Option.**  
**The following queue settings are available in the drop-down box:**

- Sign-In
- Available
- Unavailable
- Wrap-up
- Sign-Out



# *catalytic*

it's the *connection* that matters



**[www.catalytic.co.za](http://www.catalytic.co.za)**

[support@catalytic.co.za](mailto:support@catalytic.co.za)

087 945 0006