



Evonex Connect Installation and User Guide

for Web Browsers, Windows, macOS, iOS & Android



Document Version Control

Document Version	Date of Publication	Author	Comments
1.0	October 2023	MF	Initial release for Web Browsers, Windows, macOS and iOS.
1.1	April 2024	MF	Add features relating to Evonex Connect versions 1.0.4 through 1.0.7: • Initial release for Android. • Add 'Secondary ringer' for Desktop versions. • Dark Mode themes. • Click-to-dial – register Evonex Connect as the default app for Tel: links.
1.2	August 2024	MF	Add features relating to Evonex Connect versions 1.0.8 through 1.2.0: • Settings menu redesigned into sub-sections. • Call History interface redesigned into a single filterable and searchable list. • Add 'Ring Profiles' feature. • Call transfer list and search now includes personal and shared address books.
1.3	September 2024	MF	Add features relating to Evonex Connect version 1.3.0: • CRM Integration with: ○ Arbor ○ Freshdesk ○ Hubspot
1.4	October 2024	MF	Add features relating to Evonex Connect version 1.4.0: • Short code/Extension number display throughout the app • Outgoing CLI presentation can now be configured by your administrator and user selections synchronise across your devices • iOS & Android now receive push notifications for new voicemail messages. • iOS & Android apps can now toggle Voicemail message playback through the earpiece/speaker. • Click-to-dial Chrome browser extension
1.5	December 2024	MF	Add features relating to Evonex Connect version 1.5.0: • Help Section • Shared/Group voicemail inbox support • Option to log off on the 'You already have 5 devices' dialogue box

1.6	May 2025	MF	Add features relating to Evonex Connect version 1.6.0: • Companion Mode (v1 due late May 2025) • Call Feedback • Enhancement to Call History for Outgoing calls to include the presentation number • Enhancement to the Evonex Authentication Service • Dialpad key tones can now be disabled
1.6.1	July 2025	MF	Add new CRMs: • Bromcom MIS • Dynamics 365 • Generic URL • Salesforce • Workbooks • Zendesk Support • Zoho CRM
1.7	October 2025	MF	Add features relating to Evonex Connect version 1.7.0: • Add a third example of a third-party 2FA application which has Windows and macOS desktop versions • Contact filters are now checkboxes so you may search from multiple directories concurrently • Contacts 'All' filter now includes CRM contacts • CRM screen-popping now functions for outgoing calls as well as incoming • CRM contacts can now be manually screen-popped from contacts, call history and voicemail. • Long-press/click on the dialpad delete button to remove all entered digits • Add CPOMS safeguarding incident reporting • Add Arbor/Bromcom Court Order notifications • Added 'Education Addendum' detailing all the education-specific elements of this release of Evonex Connect
1.8	December 2025	MF	Add features relating to Evonex Connect version 1.8.0: • If your connectivity is poor or changes mid-call, Evonex Connect will now handle this gracefully, and attempt to reconnect your call if possible. • Ability to playback your call recordings through call history, permissions required.

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Evonex Connect and Universal License Overview

Evonex Connect is developed and supported by Evonex and our in-house teams, based in the UK. It is a WebRTC-based client incorporating a Softphone, meaning you can access your telephone from any modern Web Browser, anywhere! But it's not just limited to browsers – there are Windows, macOS, iOS and Android versions too. That means we're now able to support users of the most commonly used Operating Systems, including ChromeOS and some Linux installations, with a desktop and modern Web Browser.

Evonex Connect allows you to make and receive calls to and from external parties and call and chat with colleagues internally. It brings you all the call handling options you'd expect of a traditional telephone system – hold, park, transfer, conference, etc. You can also search directories, see your call history and keep track of your voicemail messages.

Evonex Connect is designed to work in conjunction with the Universal License subscription to allow up to five concurrent logins/registrations from your devices. Universal License also means you'll only have one telephone number for all your devices.

Evonex Connect is truly cross-platform in that it is supported on multiple Operating Systems. This guide covers all versions. The Web version allows you to access Evonex Connect from any desktop web browser, anywhere, without compromising any features or functions. Should you wish to access Evonex Connect via any modern Web Browser, without installing any software, please navigate to <https://phone.telephony-cloud.com/> and log in with your credentials.

There are also applications that you can install onto your Windows PC/laptop running Windows 10 and above, or Apple iMac, Mac Mini or MacBook running macOS 13 and above.

For Mobile, there are Evonex Connect iOS and Android applications. These are supported on Apple iOS 16 and above or Android 11 and above, respectively.

No matter which device you're using Evonex Connect via, the user experience is very similar, if not identical. From the conception of the product, we've strived to use the latest technology to create a familiar and intuitive experience, for all users, on any device. By taking a 'mobile first' approach, our development team have delivered an app that works brilliantly on mobile and desktop.

We've ensured that important system features and functions are synchronised across all your active devices. For example, if you enable DND on one device, it will synchronise with the server and automatically update all your other devices. The same is true of call divert and call park as well as a whole host of user settings. And, of course, if you receive a call to your telephone number, you can control which of your devices will ring, with the default being that all your devices will ring simultaneously.

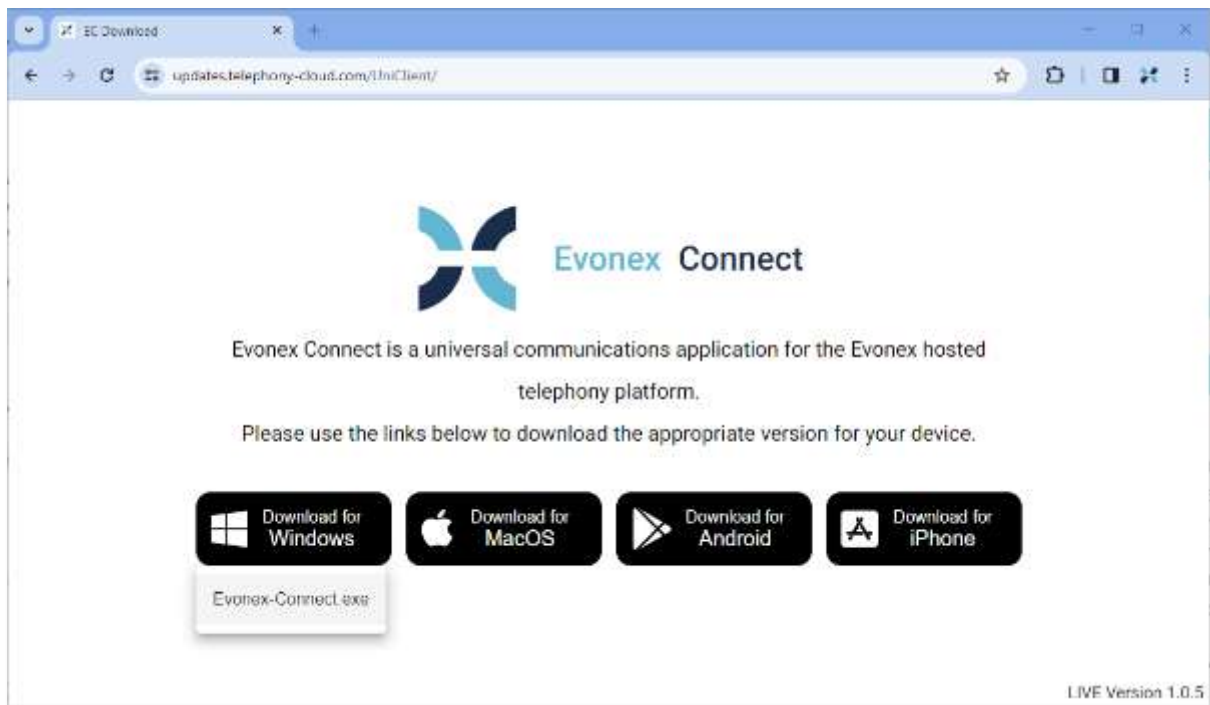
Evonex Connect integrates seamlessly with the existing Evonex cloud hosted telephony platform, meaning things like Portal and Insights remain unchanged and therefore familiar to all users.

We hope you enjoy using Evonex Connect and we hope it increases yours and your colleague's productivity.

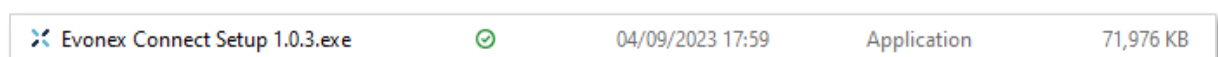
The Evonex Team.

Installation on Windows

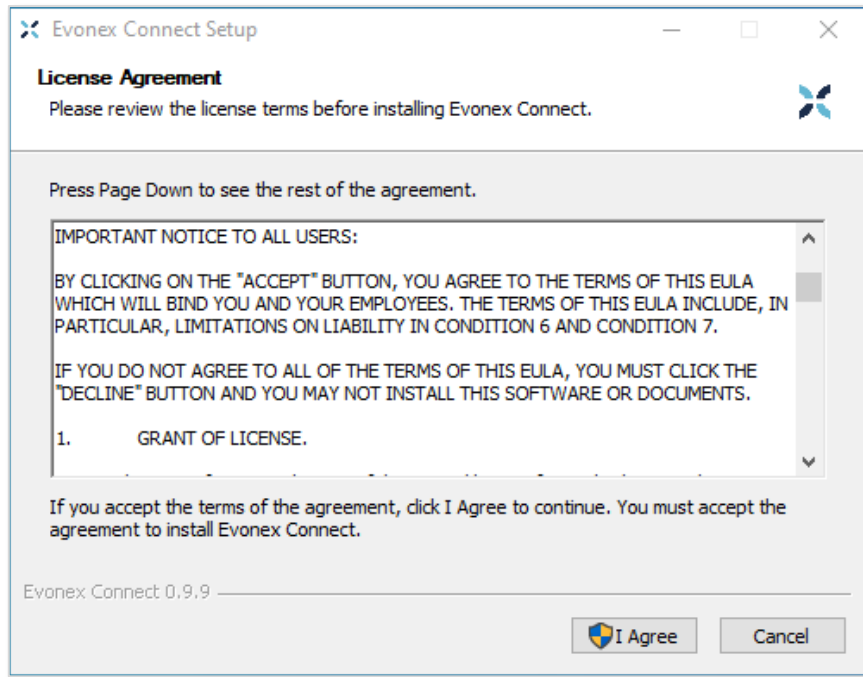
1.
 - a. Open a Web Browser and Navigate to: <https://updates.telephony-cloud.com/UniClient/>
 - b. Alternatively, log on to Evonex Connect in your web browser at <https://phone.telephony-cloud.com> and go to 'Settings > Help' and click the 'Windows/macOS' button.
2. Click the 'Download for Windows' button then click the 'Evonex-Connect.exe' link.



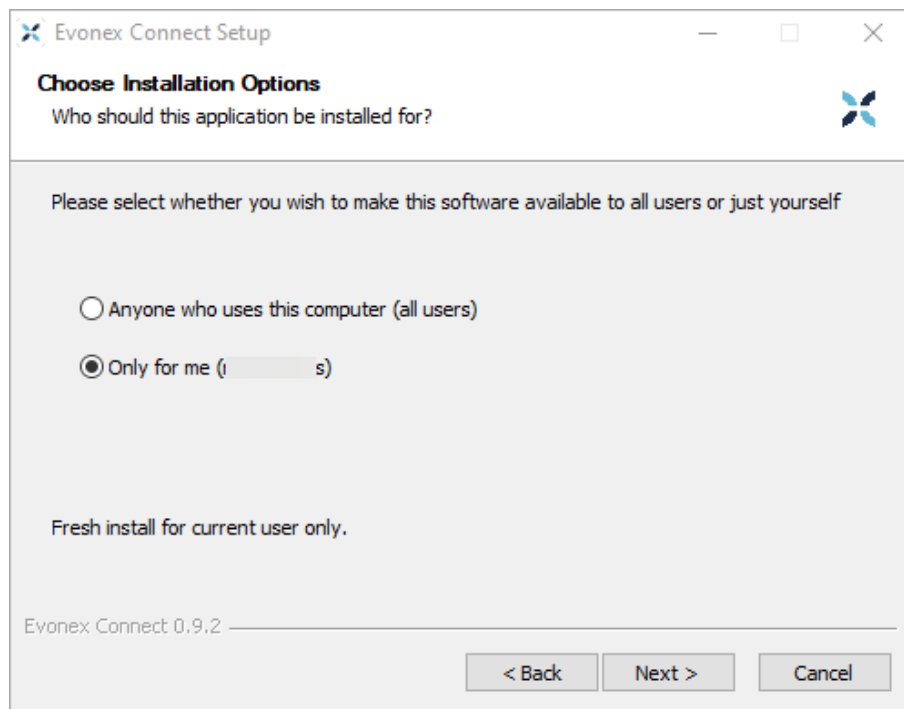
3. An Explorer window will appear prompting you save a file with the name 'Evonex Connect Setup 1.0.7.exe' or similar. Choose a destination in which to save the file, and it will download.
4. Navigate to the destination of the file and double click the Evonex Connect Setup.exe file.



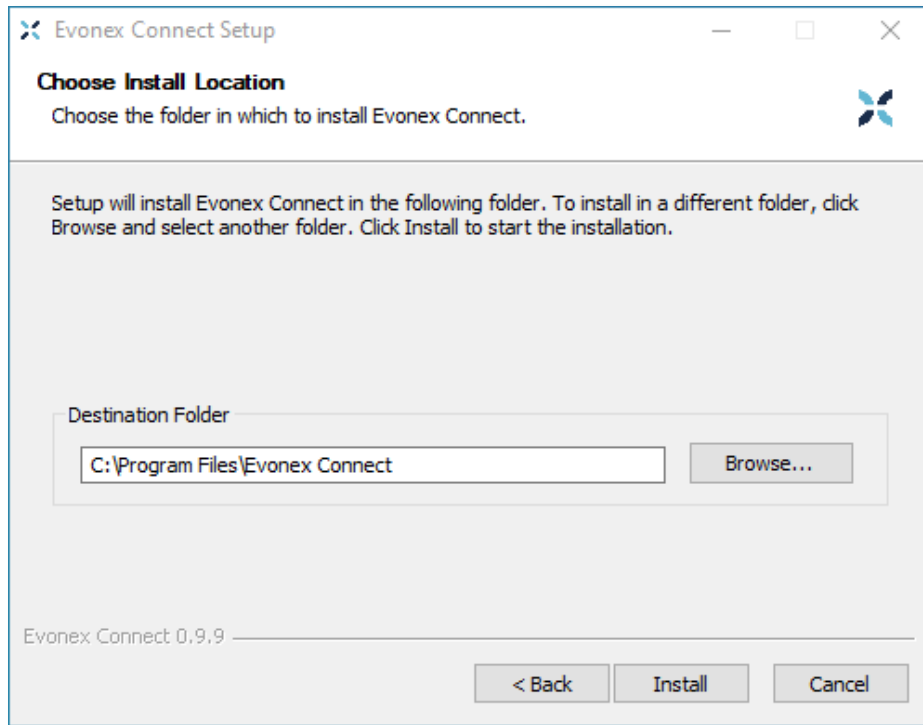
5. Please read and agree to the End User License Agreement. You may be prompted to enter administrator credentials, please contact your technical support team if you need assistance.



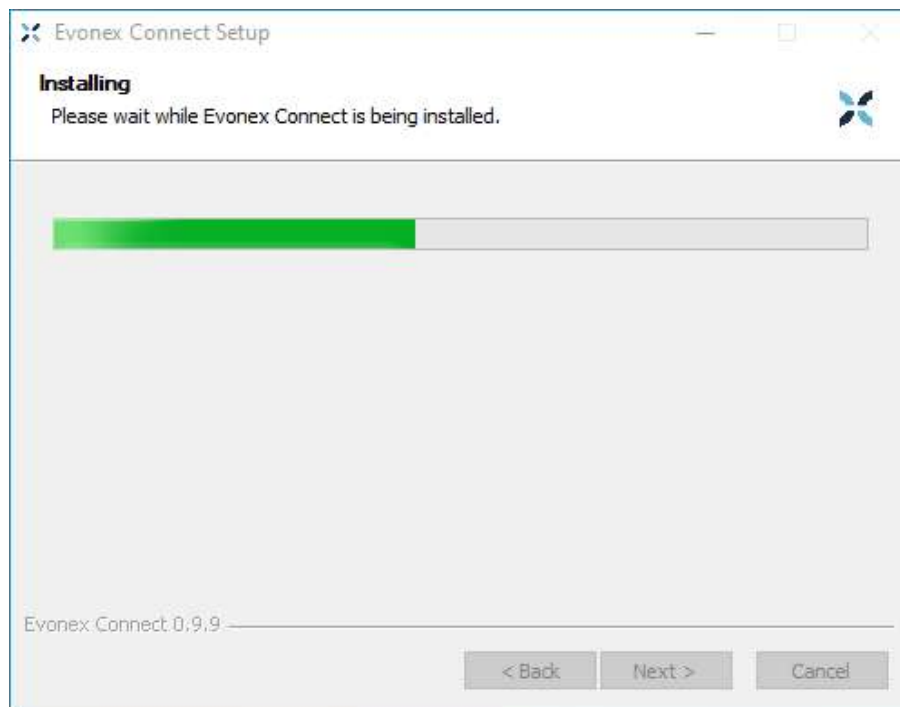
6. If you share this computer with other users, select 'Anyone who uses this computer (all users)'. However, we recommend selecting 'Only for me' (User.Name)' otherwise you may be prompted to enter an administrator password. Click 'Next'.



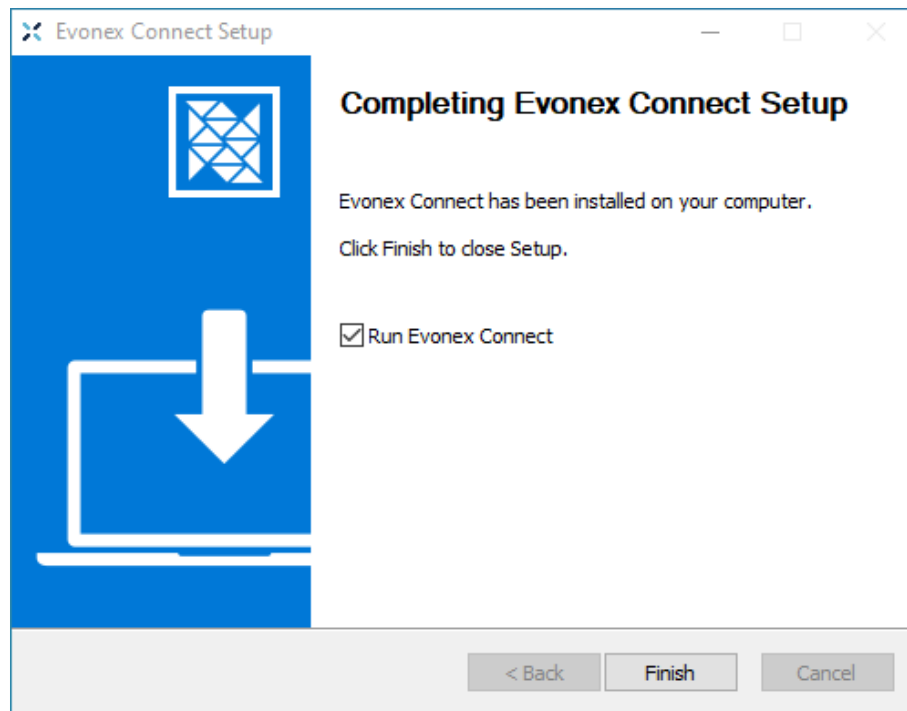
7. Select the installation path. If you're unsure, please leave this as the suggested default location and click 'Install'.



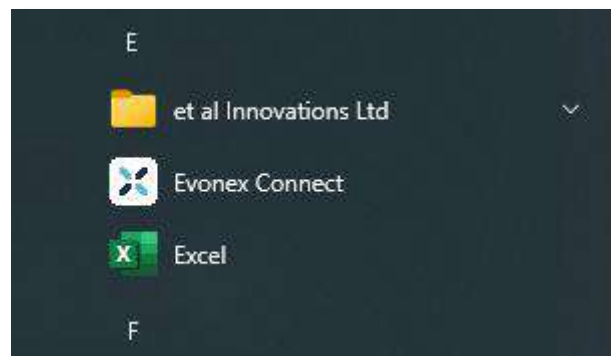
8. Evonex Connect will now be installed onto your computer.



9. When installation is complete, you will have the option of running Evonex Connect straight away. If you'd like to get started, just click Finish and Evonex Connect will run and the login window will appear on your screen.



10. For convenience, the installation process will create a desktop icon and Start Menu item, so you can easily run Evonex Connect next time.



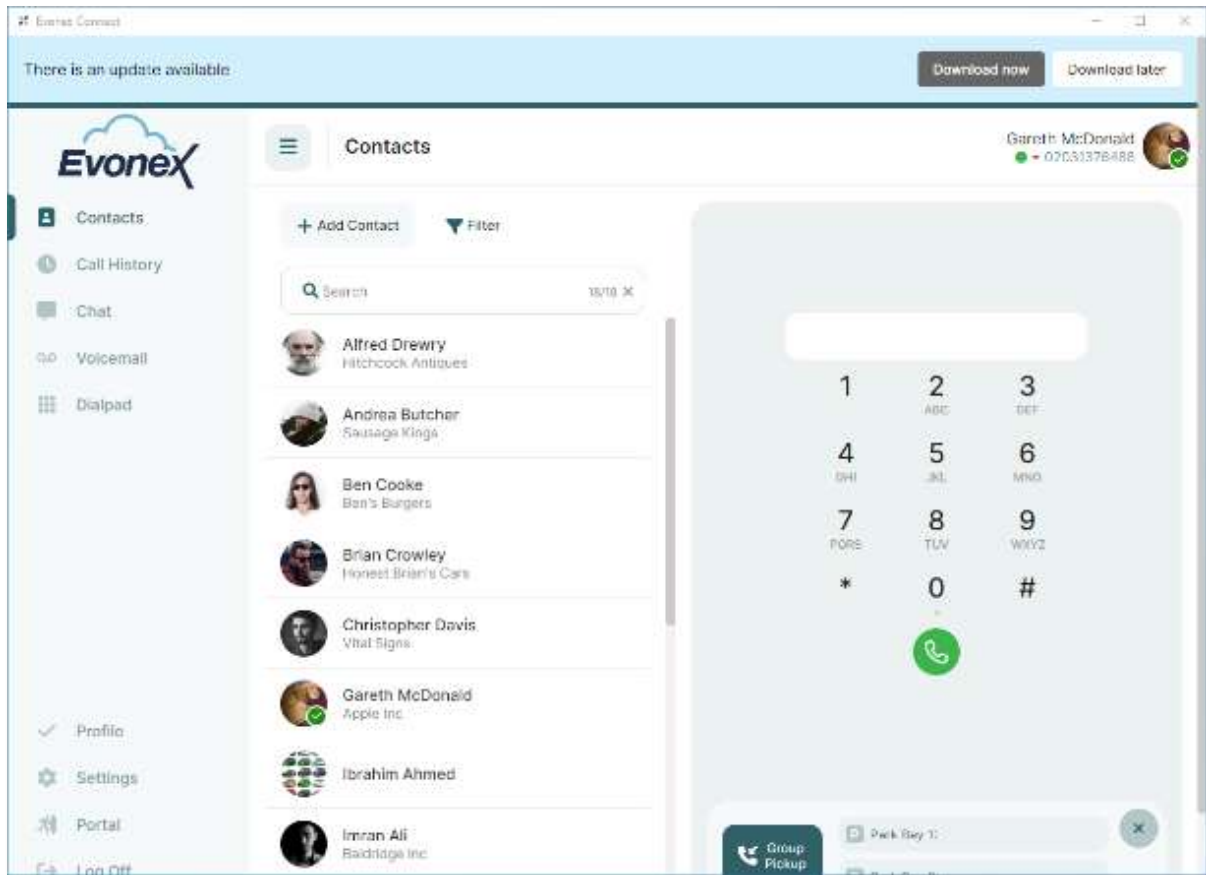
Auto-start Evonex Connect

If you would like Evonex Connect to automatically start when you login to your computer, go to 'Settings > Preferences > Auto-start application' and ensure it is set to 'Enabled'.

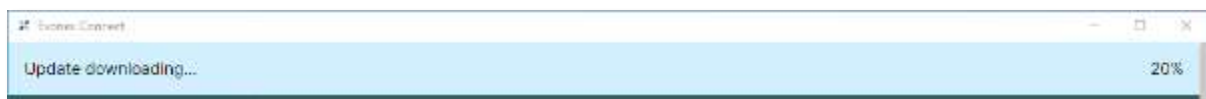


Updates

When a new update becomes available for Evonex Connect, you will be notified automatically. You will see a banner at the top of the app, similar to the one below. You'll have the option to download the update now or cancel and be reminded the next time the app starts. We recommend you click 'Download now'.



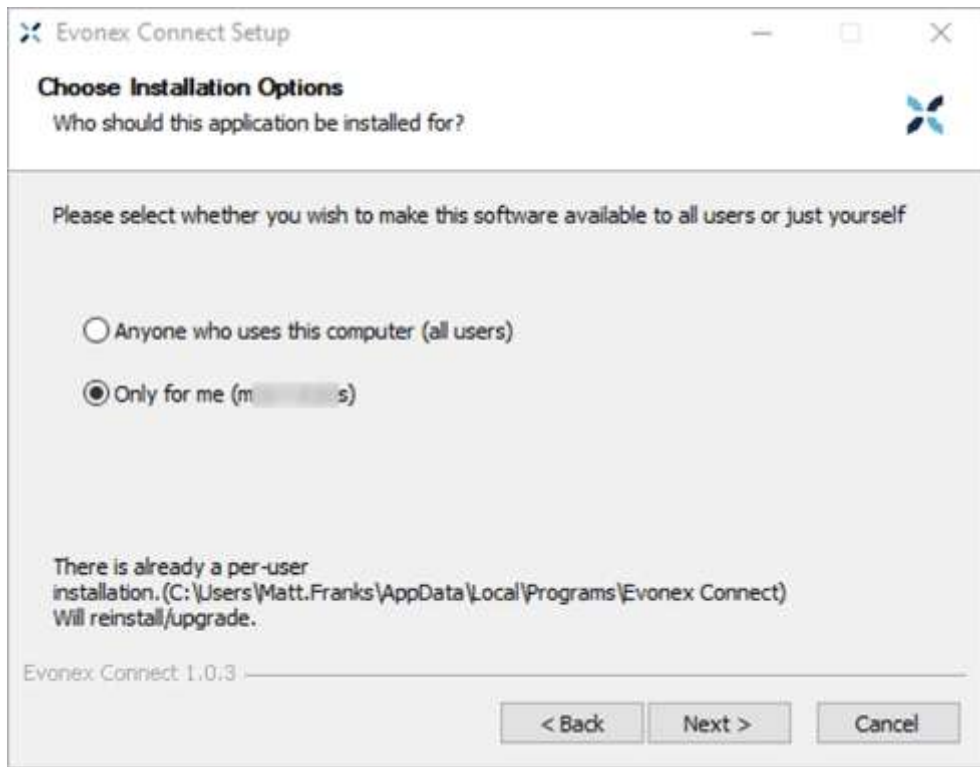
The update will be downloaded, and a progress indicator shown.



When the download is complete, you can decide to 'Restart now' or 'Install on close'. We recommend you select 'Restart now'.



We recommend you leave this setting as default – it will remember the option that was selected when Evonex Connect was originally installed.

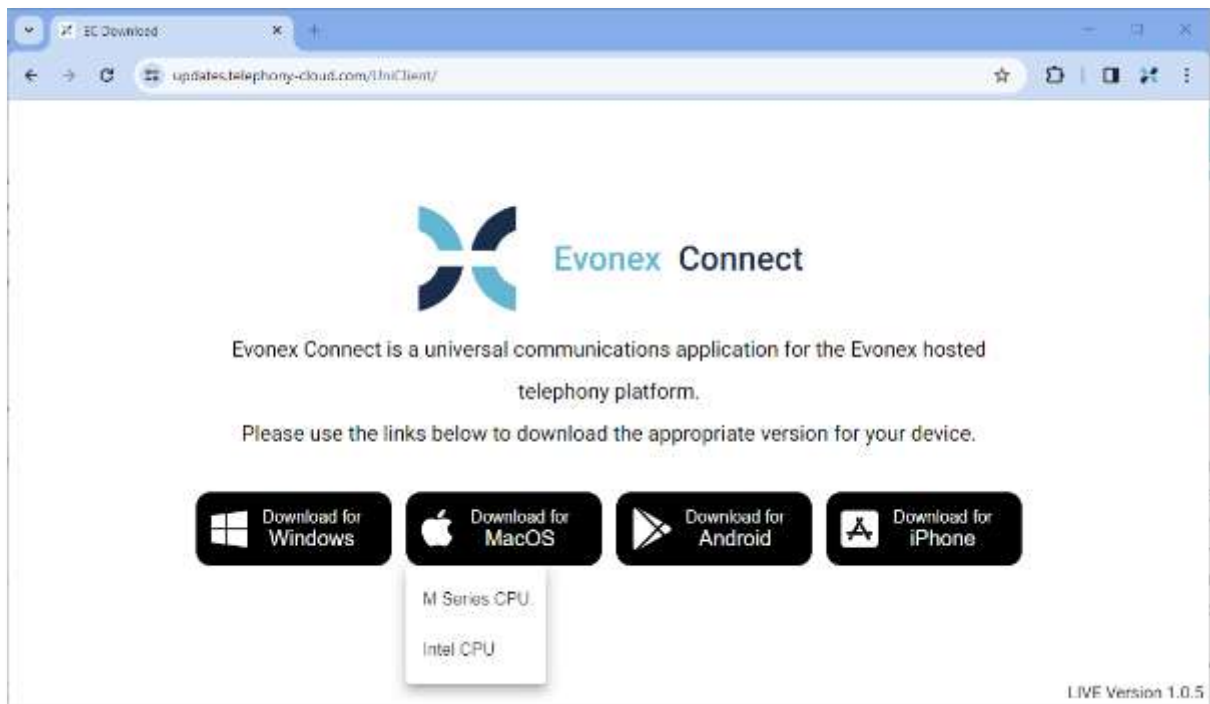


The update will be installed. You may or may not need to provide administrator credentials, based on your organisation's IT policy. Please contact your support team if you need assistance.

After installation, Evonex Connect will restart ready for use.

Installation on macOS

1.
 - a. Open a Web Browser and Navigate to: <https://updates.telephony-cloud.com/UniClient/>
 - b. Alternatively, log on to Evonex Connect in your web browser at <https://phone.telephony-cloud.com> and go to 'Settings > Help' and click the 'Windows/macOS' button.
2. We have provided two files: one for each of the two types of Apple hardware in circulation.
 Click on the 'Download for MacOS' button. Then, select the 'Intel CPU' link if your Mac was made between 2005 and 2021 (Intel CPU). Or, if your Mac was made after 2021 (Apple Silicon CPU), select the 'M Series CPU' link. If you're unsure, please contact your support team.



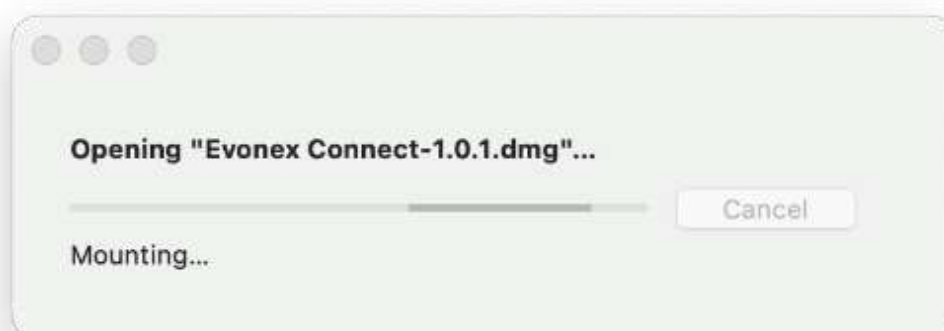
3. A Finder window will appear prompting you save a file with the name 'Evonex Connect-1.0.7.dmg' or similar. Choose a destination in which to save the file, and it will download.
4. Navigate to the destination of the file and double click the Evonex Connect-x.x.x.dmg file.

Name	Date Modified	Size	Kind
Evonex Connect-1.0.3.dmg	Today at 3:04 pm	97.5 MB	Disk Image

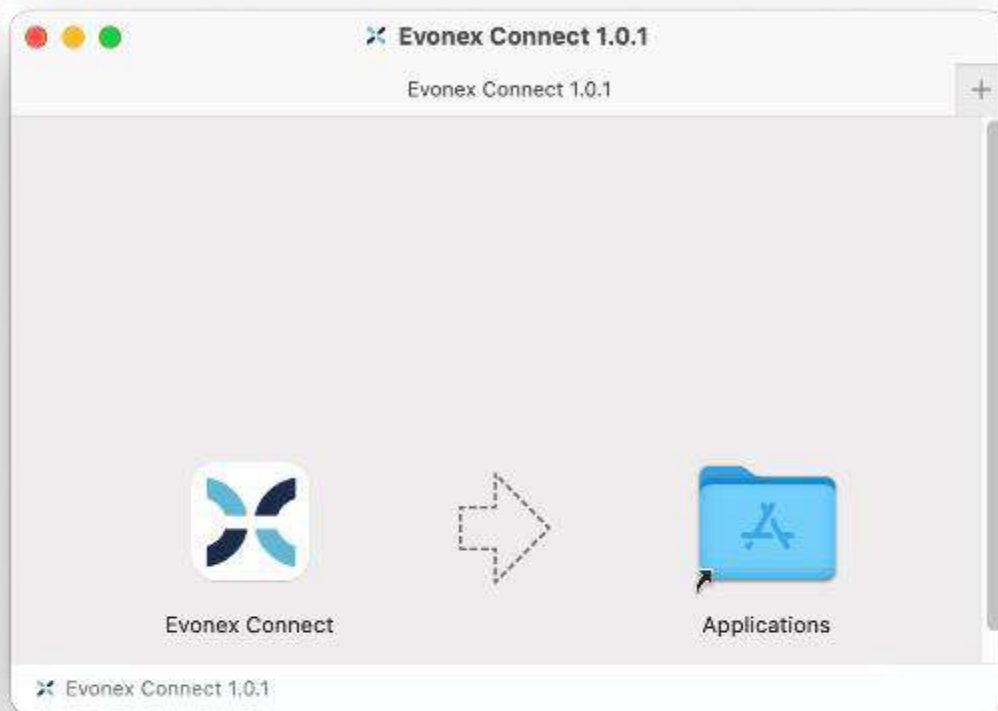
- Please read and agree to the End User License Agreement. You may be prompted to enter administrator credentials, please contact your technical support team if you need assistance.



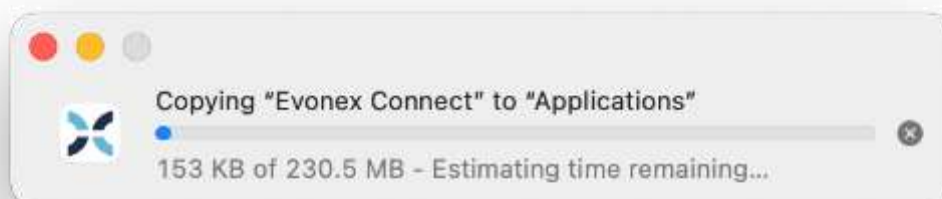
- The file will be opened and unpackaged.



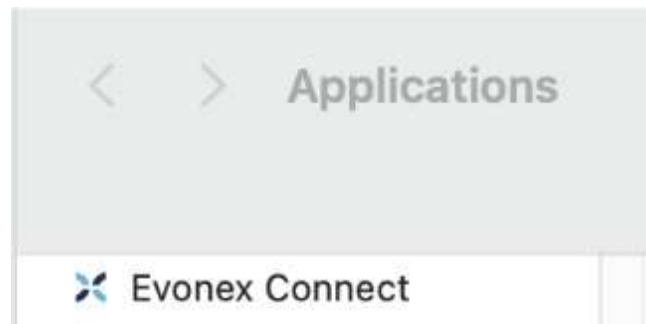
7. To install Evonex Connect, simply drag its icon to the Applications folder in the resulting window.



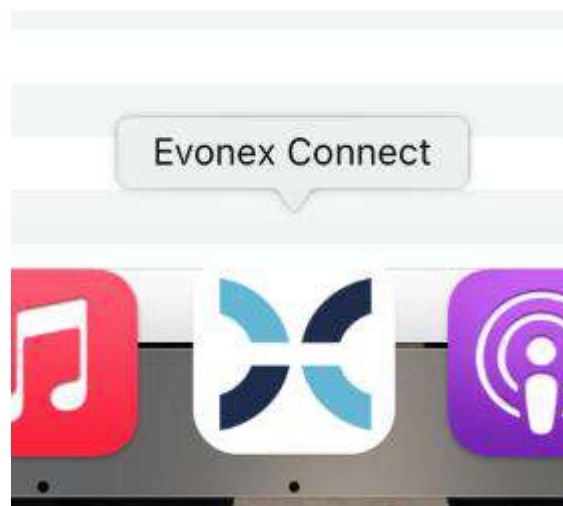
8. Evonex Connect will now be installed onto your computer.



9. When installation is complete, go to your applications folder and double click the Evonex Connect icon to open the application.



10. When running, the Evonex Connect icon appears on the Dock at the bottom of your screen. For convenience, you may pin Evonex Connect to the Dock, so you can easily run Evonex Connect next time.

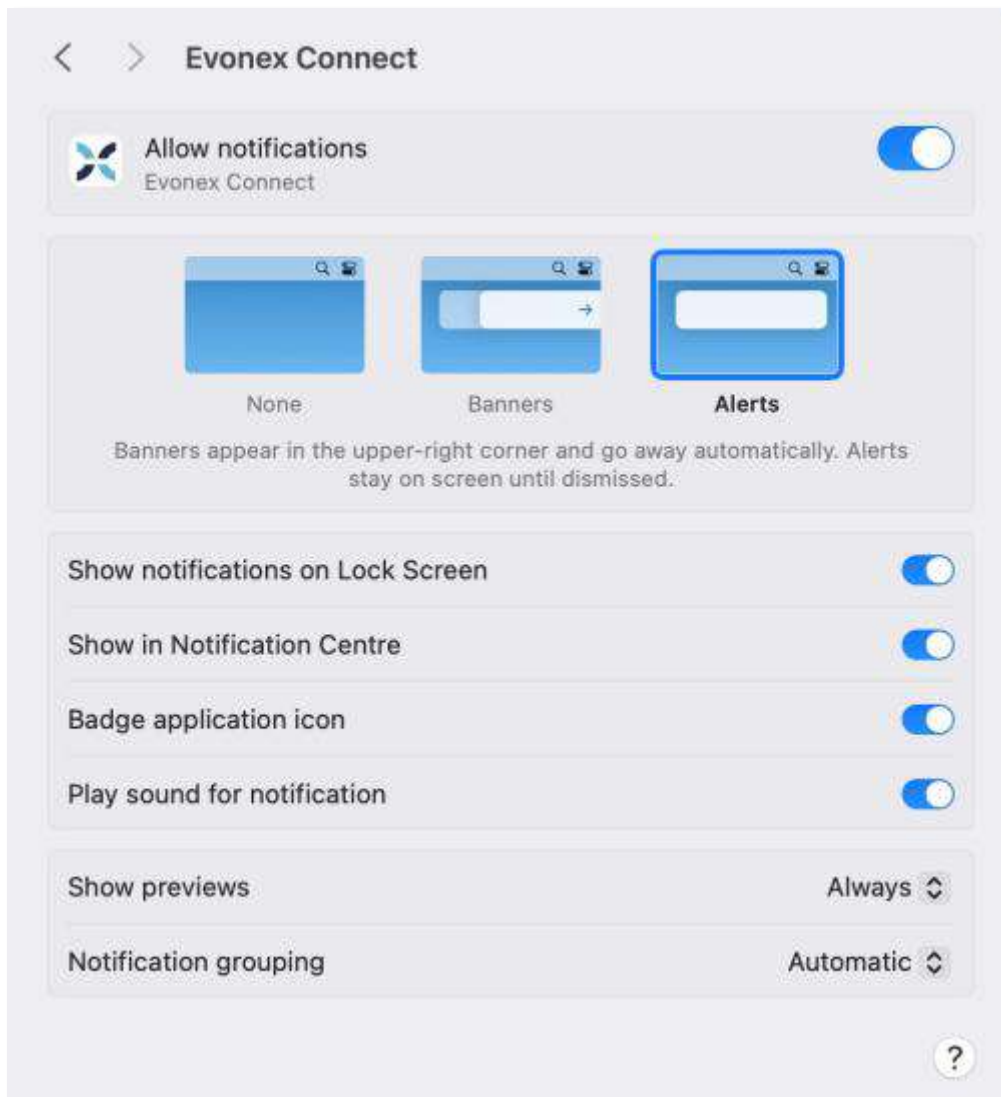


Notifications

In order to see the call notifications on a Mac when Evonex Connect is not the foreground application, you must enable notifications for the Evonex Connect application in the macOS notification settings.

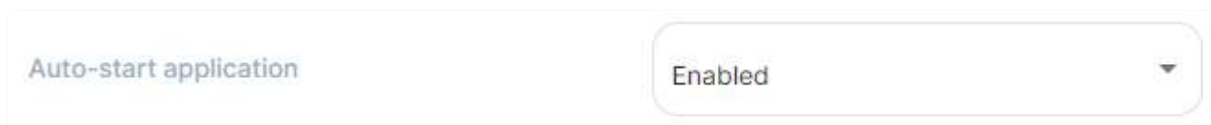
This is located in: Settings > Notifications > Evonex Connect > Allow Notifications.

Configure the settings as per the below image:



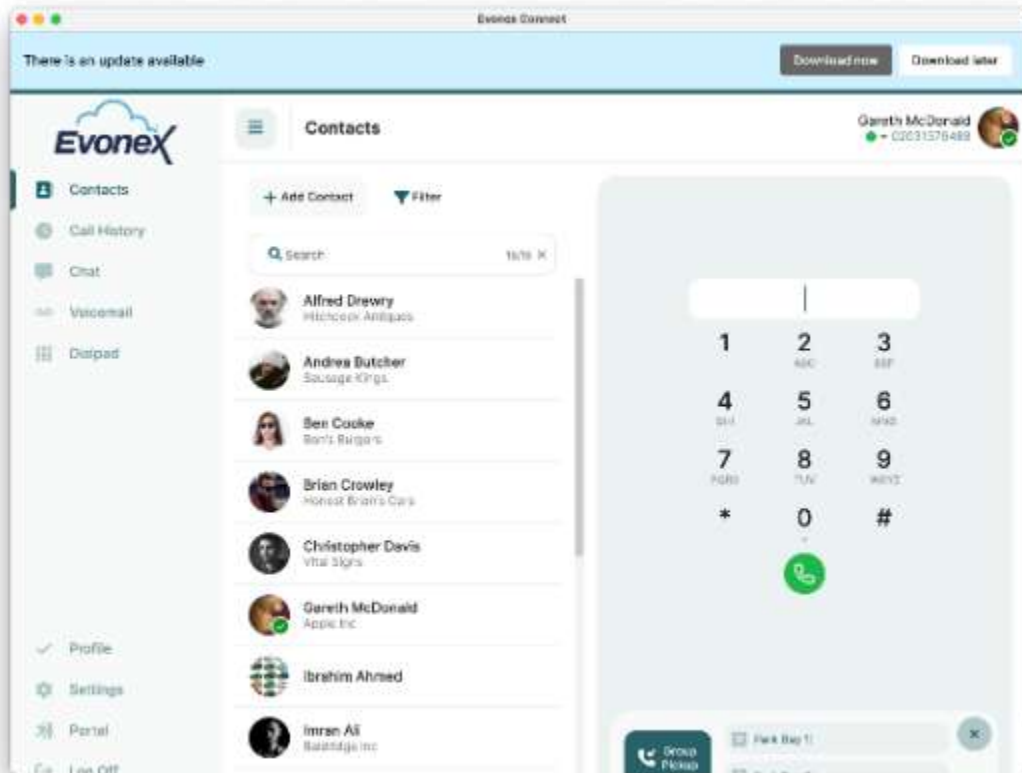
Auto-start Evonex Connect

If you would like Evonex Connect to automatically start when you login to your computer, go to 'Settings > Preferences > Auto-start application' and ensure it is set to 'Enabled'.



Updates

When a new update becomes available for Evonex Connect, you will be notified automatically. You will see a banner at the top of the app, similar to the one below. You'll have the option to download the update now or cancel and be reminded the next time the app starts.



The update will be downloaded, and a progress indicator shown.



When the download is complete, you can decide to 'Restart now' or 'Install on close'. We recommend you select 'Restart now'



The update will be installed. You may or may not need to provide administrator credentials, based on your organisation's IT policy. Please contact your support team if you need assistance.

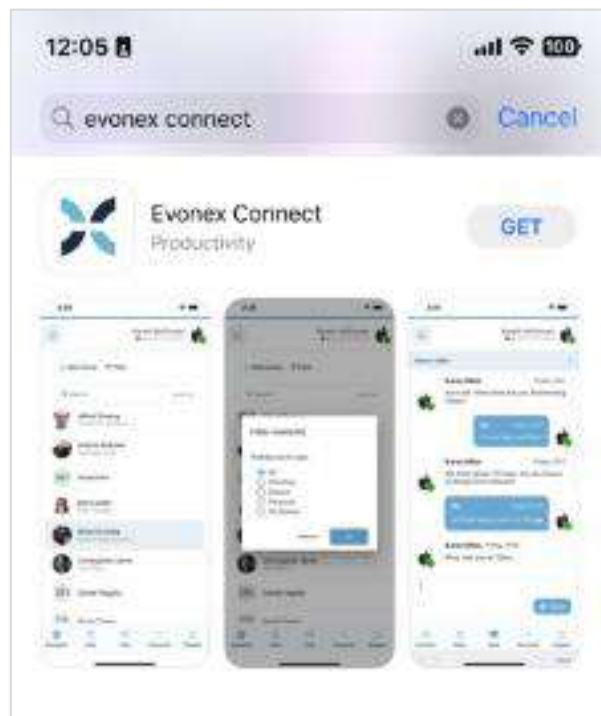
After installation, Evonex Connect will restart ready for use.

Installation on iOS

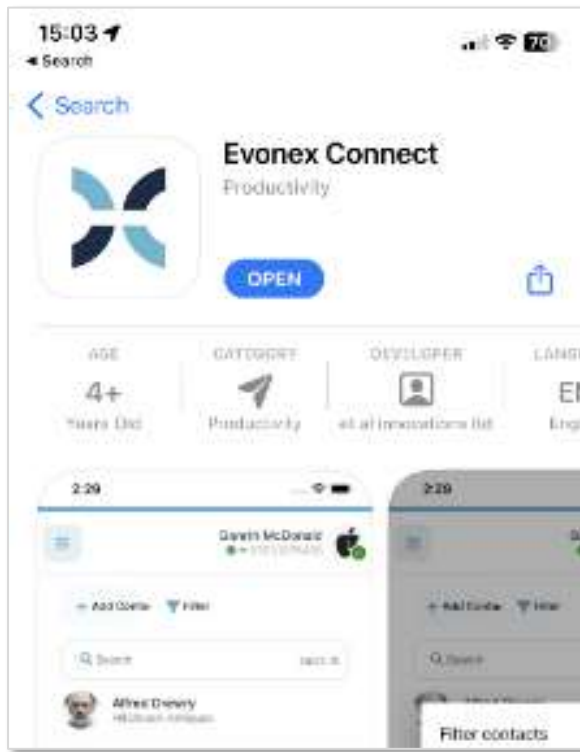
1.
 - a. Open the App Store app on your iPhone or iPad and search for 'Evonex Connect' or use [this direct link](#).
 - b. Alternatively, log on to Evonex Connect in your desktop web browser at <https://phone.telephony-cloud.com> and go to 'Settings > Help' and click the 'Android and iOS' button.
 - c. Or, using your mobile phone camera, scan the iOS QR code:



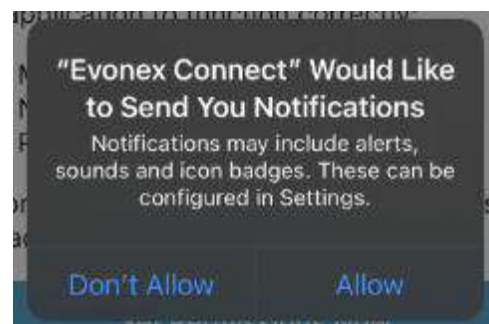
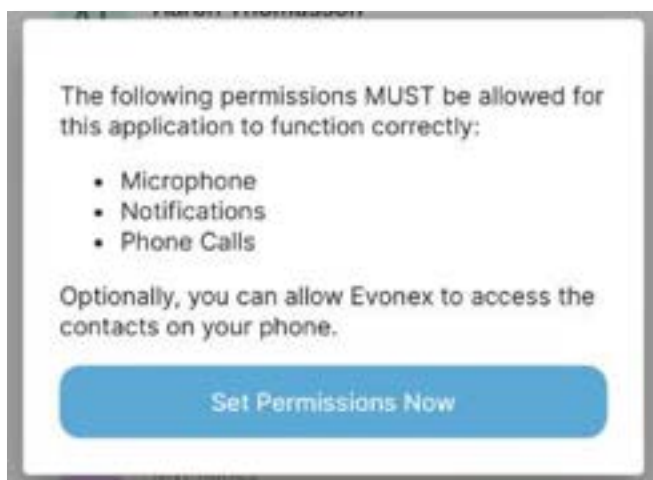
2. Tap the  get button and the app will download and install on your device.



3. Tap **OPEN** open once downloaded or locate the app on your Home screen and tap it to get started.



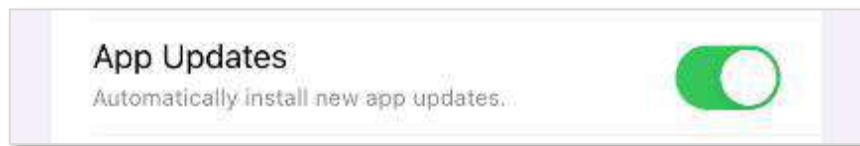
4. Allow Evonex Connect to access the microphone, send notifications, make and receive phone calls and your contacts by clicking on the 'Set Permissions Now' button then click 'Allow' on the pop-ups:



5. You may move the Evonex Connect app to the background or close it in the normal ways. In either of these states, the app will be woken up when a call arrives using push notifications. This means the app is not relying on excessive battery or data usage to keep it active.

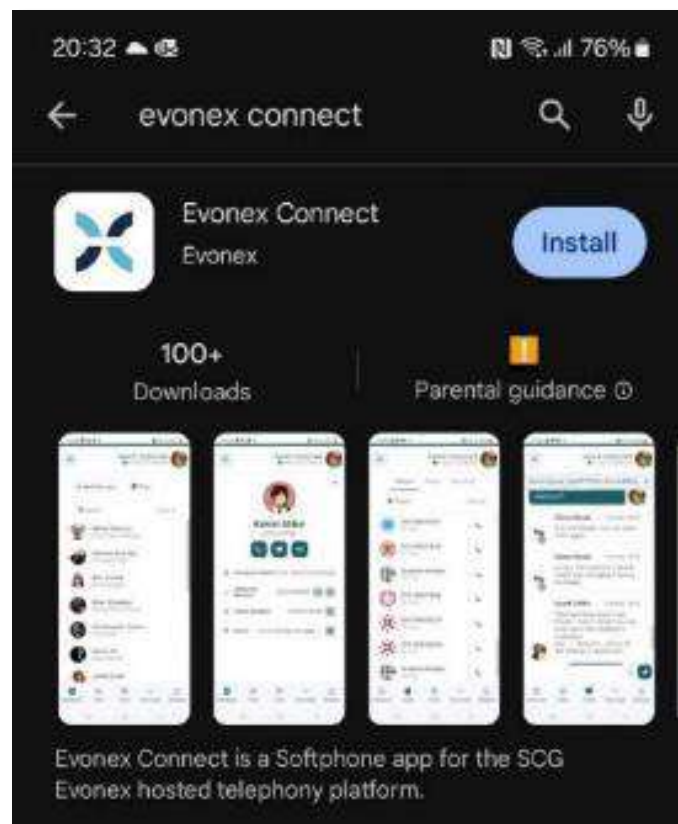
Updates

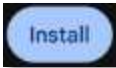
The Evonex Connect for iOS app will automatically update to the latest version when available if your device is configured correctly. To check this, please go to Settings > App Store and ensure 'App Updates' is enabled.

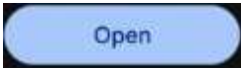


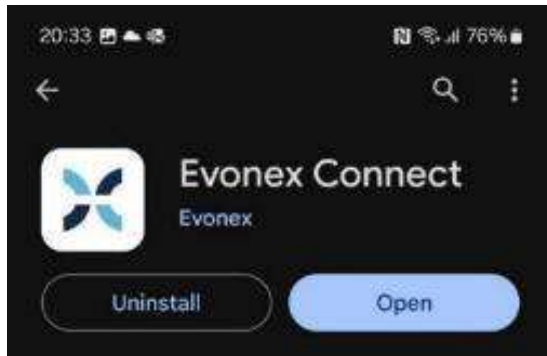
Installation on Android

1.
 - a. Open the Play Store app on your Android mobile or tablet device and search for 'Evonex Connect' or use [this direct link](#).
 - b. Alternatively, log on to Evonex Connect in your desktop web browser at <https://phone.telephony-cloud.com> and go to 'Settings > Help' and click the 'Android and iOS' button.
 - c. Or, using your mobile phone camera, scan the iOS QR code:

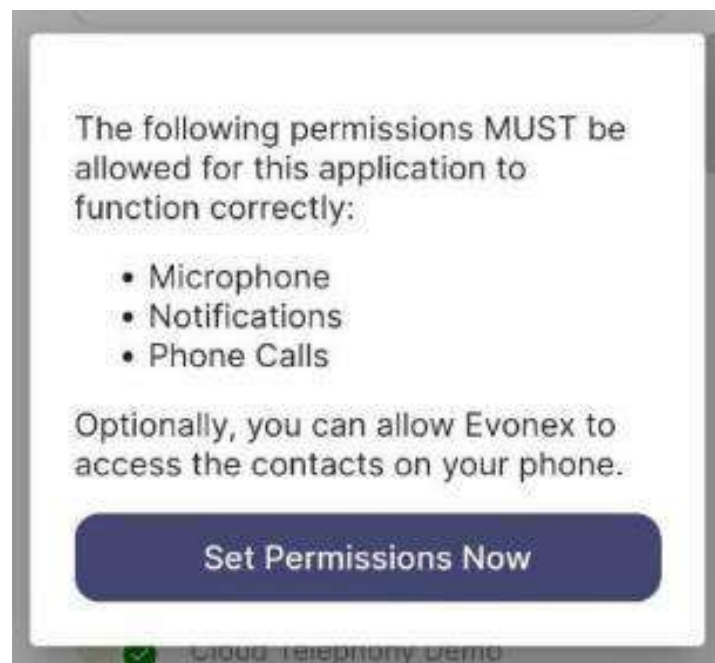


2. Tap the  button and the app will download and install on your device.

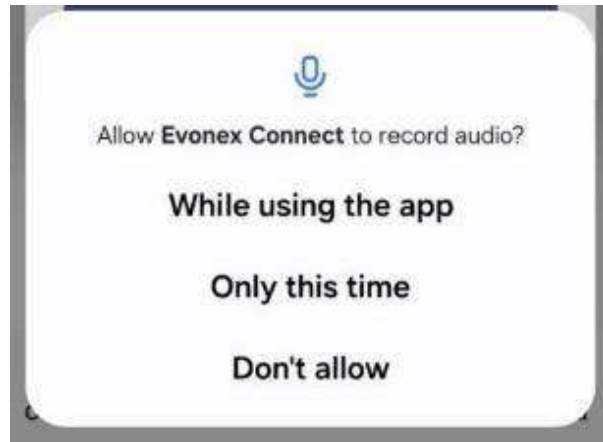
3. Tap the  button once installed or tap the app on your device's home screen.



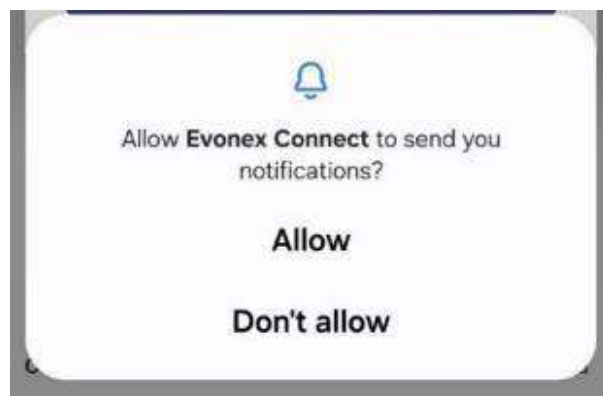
4. When you first run the app, you will be prompted to set permissions for the app by tapping the 'Set permissions now' button:



5. Then tap 'While using the app' for the first question to allow the recording of audio:



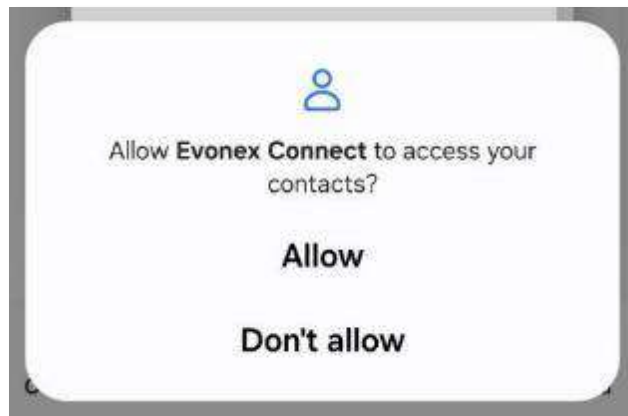
6. And tap 'Allow' for the following three questions, firstly to allow the sending of notifications:



7. Then the management of phone calls:



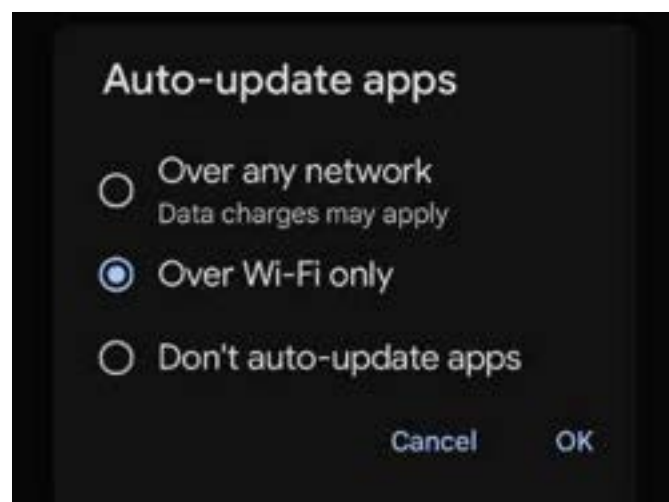
8. And finally access to your contacts (optional, not required for Push notifications):



9. You may move the Evonex Connect app to the background or close it in the normal way. In either of these states, the app will be woken up when a call arrives using push notifications. This means the app is not relying on excessive battery or data usage to keep it active. [For more information on Push notifications, please see the next section.](#)

Updates

The Evonex Connect for Android app will automatically update to the latest version when available if your device is configured correctly. We recommend your device is configured to automatically update apps. To check this, please open the Play Store app and tap your profile picture on the top right. Go to 'Settings', select 'Network preferences', and go to 'Auto-update apps'. Select 'Over Wi-Fi only' or 'Over any network' then tap OK. Data charges may apply.



If auto-update is not enabled, you may manually update the app if available. Please open the Play Store app and tap your profile picture at the top right. Tap 'Manage apps and device' then 'Updates available'. Tap the 'Update' button next to the Evonex Connect app, if listed.

Android: Push Notification Checklist

The Evonex platform uses Push notifications to wake the Evonex Connect mobile app when necessary. For Android, the Evonex platform delivers these notifications to Google which in turn relays them on to user's mobile devices.

There are not usually any delays in the delivery of these notifications, but there are some instances where delays can occur. Some notifications, like new chat messages for example, can tolerate a small delay, but other time-critical notifications, like an incoming call, must be delivered instantaneously to ensure a user is not missing phone calls.

This note will provide some tips on how to ensure your device, and the Evonex Connect app, will receive Push notifications from the Evonex platform as quickly as possible. Please follow each step in-turn as there may be multiple reasons why your device is not receiving Push notifications.

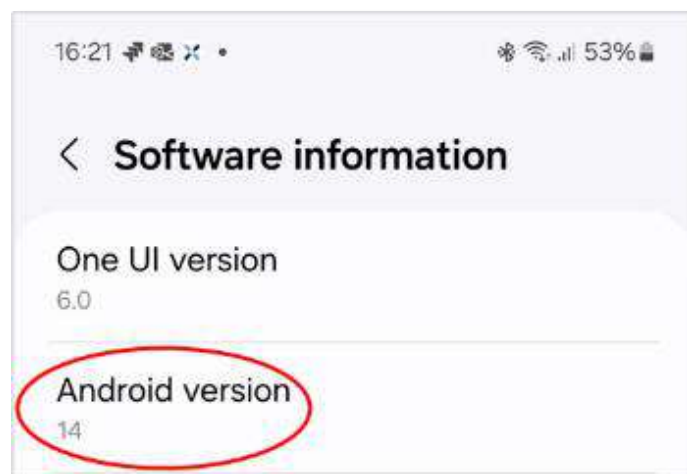
1 – Check phone hardware and operating system

Most importantly, please ensure your phone is made by a reputable manufacturer. We've seen instances where low-cost and low-quality phones can cause issues with the Evonex Connect app including slow performance, poor audio quality and slow receipt of Push notifications. It is even possible that Push notifications do not work at all if the manufacturer is not in an agreement with Google to use its Push notification service.

Examples of phone manufacturers that we consider make good quality hardware include, but are not limited to, Samsung, Google, Motorola, Huawei, OnePlus and Oppo.

Also, ideally, your phone will have been manufactured in the last three to four years to benefit from recent advancements in chipset technology. It will also need to be running Android 11 as a minimum – **we do not support Evonex Connect running on Android 10 or lower or any versions of Android Go-edition.**

To check your phone's version of Android, go to 'Settings > About > Software' and find the 'Android version' field:

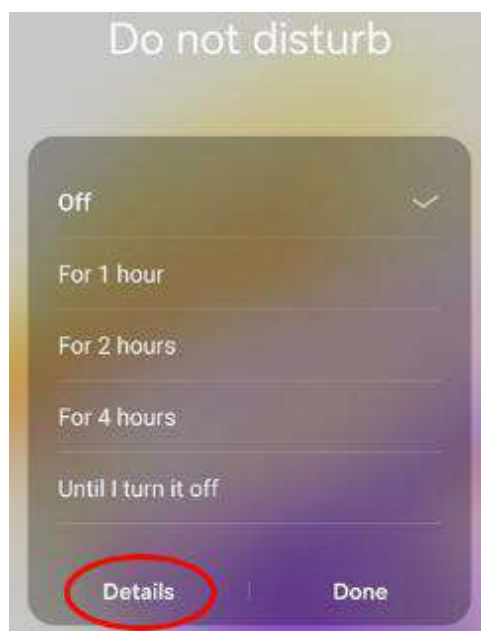


2 – Disable Do Not Disturb

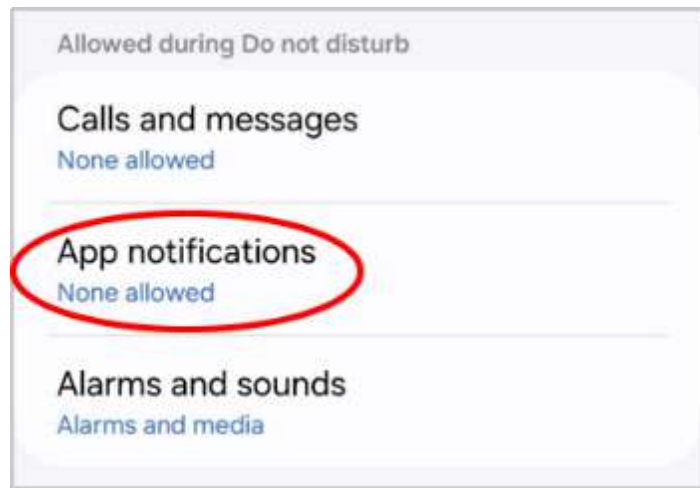
Firstly, check that DND is not enabled on your device. This could have been enabled accidentally, and it will prevent your phone from alerting you of any new calls via Evonex Connect. To check and disable DND, reveal the notifications panel by swiping down from the top of your screen and locate the 'Do not disturb' button. Tap to disable:



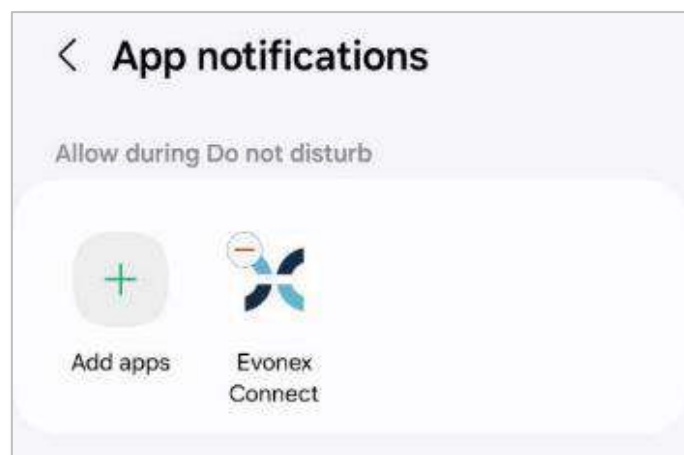
If you wish to use your phone's DND feature while still receiving calls via Evonex Connect, you may add it as an exception to the DND rule. Rather than tapping the DND button above, long-press it which will bring up a menu similar to the image below. Tap 'Details':



Tap 'App notifications':



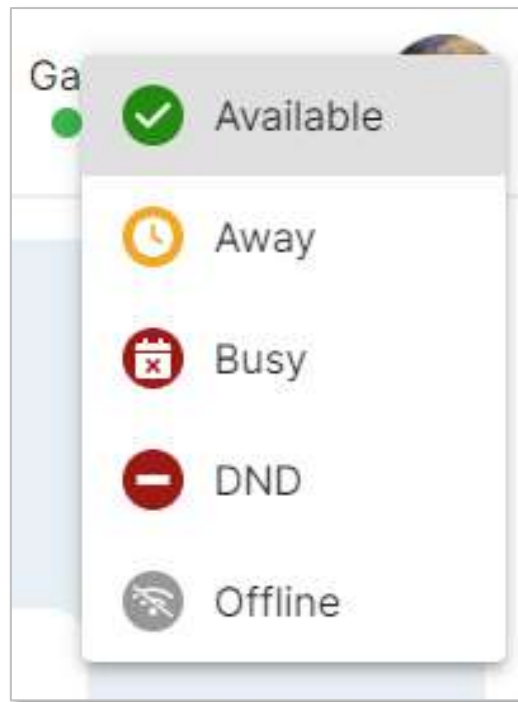
Tap 'Add apps', scroll and select 'Evonex Connect' then tap Done. The result will be similar to the image below:



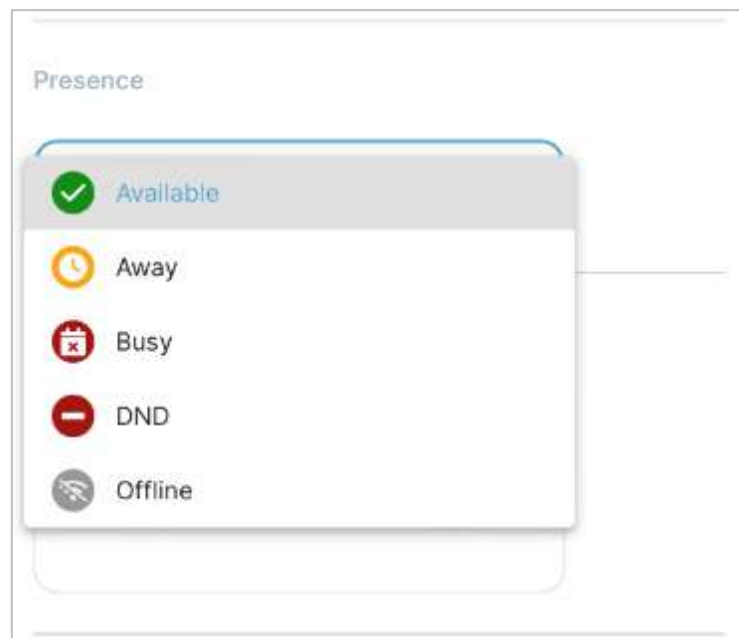
Next, check that the Evonex Connect app itself is not in DND. If your profile picture at the top-right of the Evonex Connect app shows a no entry badge and the words 'Diverting calls to Voicemail' below your username, DND is on:



To disable DND either tap your profile picture and select 'Available' from the drop-down menu...



...or tap the 'Menu' button at the top-left of the app, select 'Profile' then tap 'DND' in the 'Presence' drop-down menu and select 'Available'.



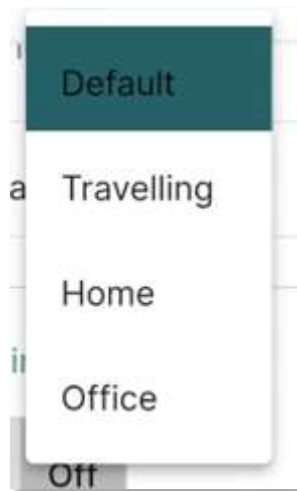
3 – Check the Active Ring Profile

Check that the active Ring Profile includes the device you are expecting to ring. If it doesn't, this device will not ring for incoming calls.

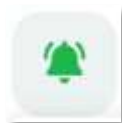
If there is a red bell at the top of the app, like this...



...then the active Ring Profile does not include this device, and it will not ring. Tap the bell and select another Ring Profile, for example...



When you select a ring profile that includes this device, the bell will turn green, like this...

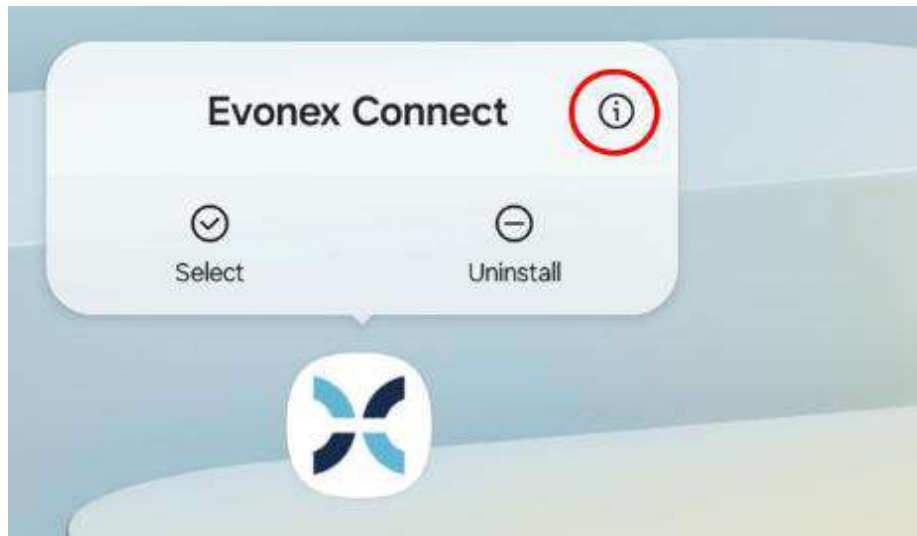


For instructions on how to create, edit or delete a Ring Profile, please see the [Ring Profile section](#) later in this User Guide.

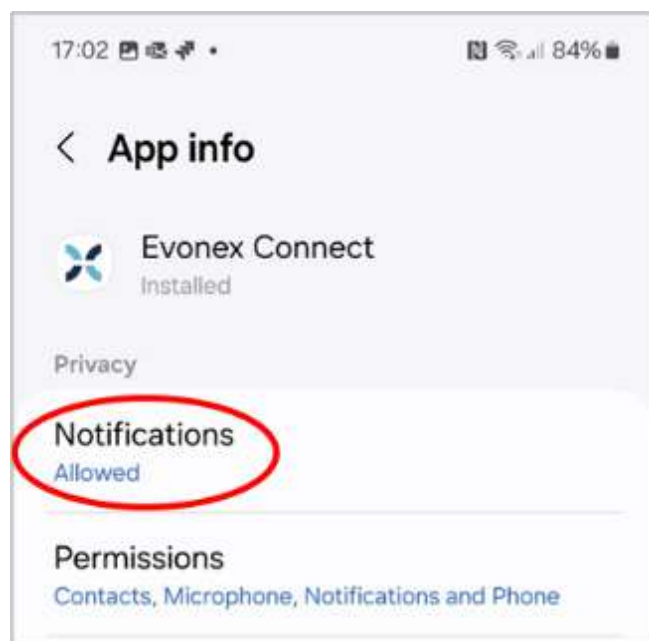
4 – Grant notification permissions

Check that you have granted permissions to the Evonex Connect app, including notifications. When you first install and run the app, you will be prompted to set permissions for the app - [see the previous section for more detail](#).

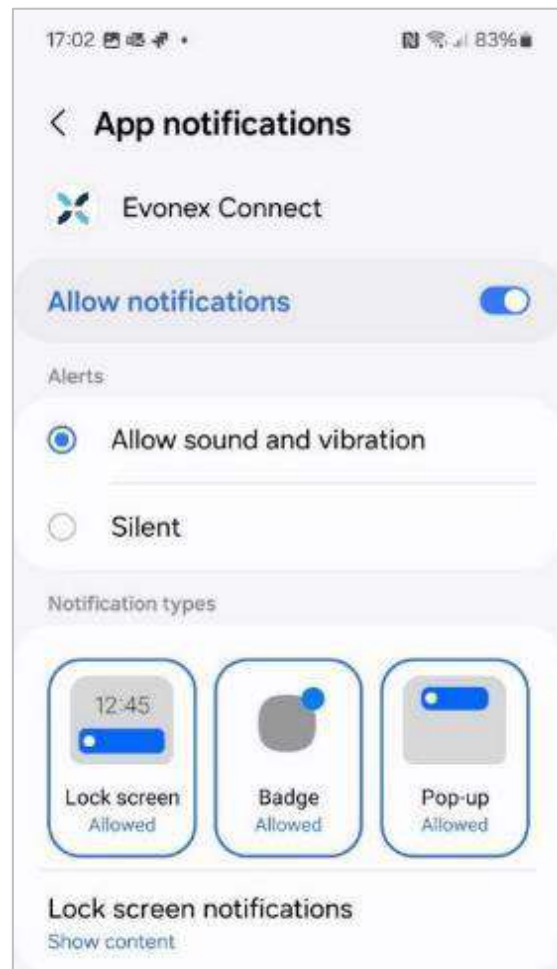
If you're not sure if you set the permissions correctly during installation and setup, you can retrospectively check app permissions. Long press on the Evonex Connect app icon on the home screen and tap the ⓘ button.



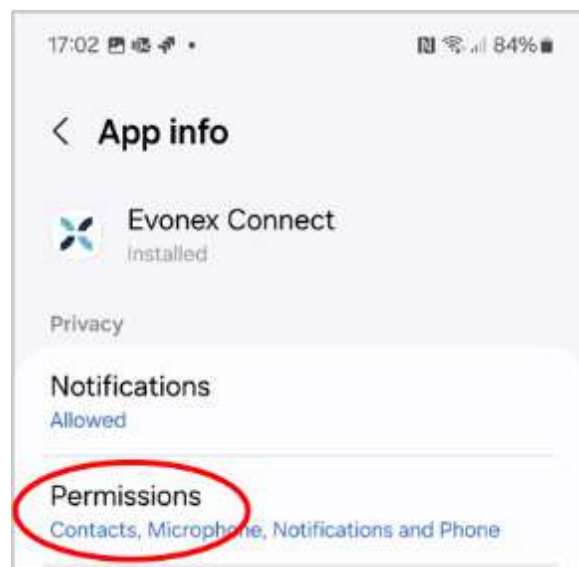
Tap 'Notifications':



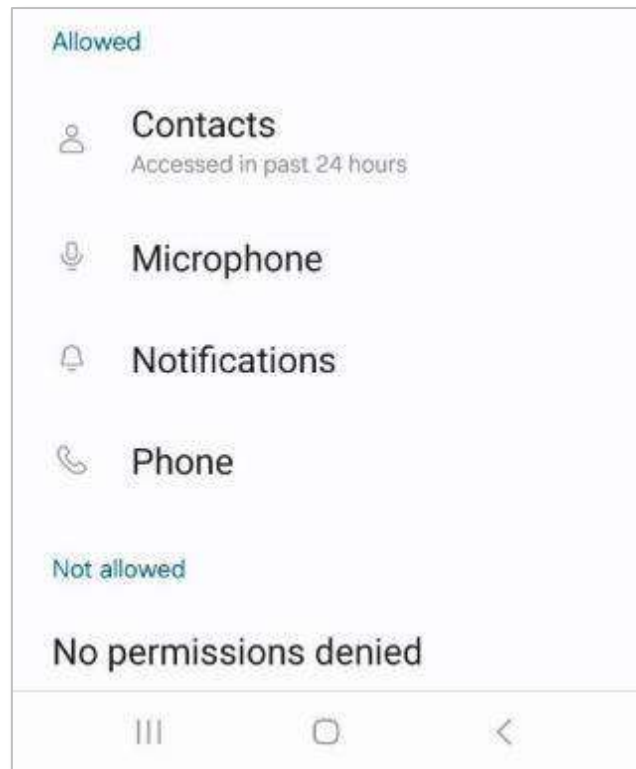
Check that 'Allow notifications' is on, alerts is set to 'Allow sound and vibration' and that 'Lock screen', 'Badge' and 'Pop-up' notifications are all allowed:



Go back to the App Info screen and tap 'Permissions':



Check that all permissions have been allowed and that no permissions have been denied:



5 – Check connectivity and enable background data

Your phone must be continuously connected to the internet to receive Push notifications, including while your phone is locked. Therefore, you should check that your phone has good 4G/5G cellular connectivity or WiFi connectivity and that background data usage is allowed.

Firstly, at the top-right of your phone screen you will likely see an icon similar to the ones below (circled in red for clarity) showing the connectivity type your phone is currently using and the strength of the signal.

The below example indicates that the phone is connected to a 4G cellular network and the strength is 3 out of 4 bars, which is good:



You may alternatively see a '5G' indicator which is usually an even better connection than 4G. 5G connections have greater bandwidth and lower latency than 4G connections. 3G or lesser connections cannot be relied upon for reliable Push notifications or voice calls.

The below example indicates that the phone is connected to a WiFi network and the signal strength is 4 out of 4 bars, which is a strong signal:

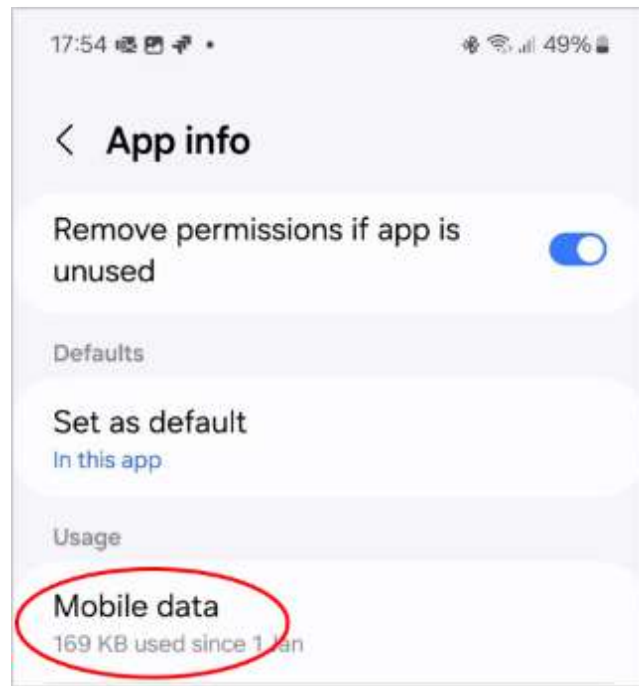


Please note that all connection types will struggle to provide reliable connectivity in busy areas where there are lots of other devices competing for connectivity, or if you are in a moving vehicle.

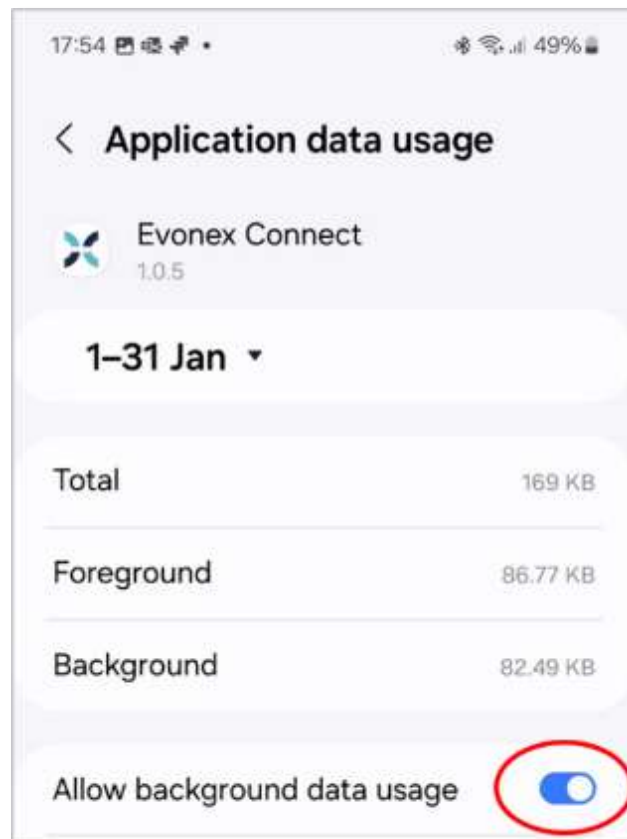
Next, check that background data usage is enabled for the Evonex Connect app. Long press on the Evonex Connect app icon on the home screen and tap the ⓘ button.



Tap 'Mobile data':



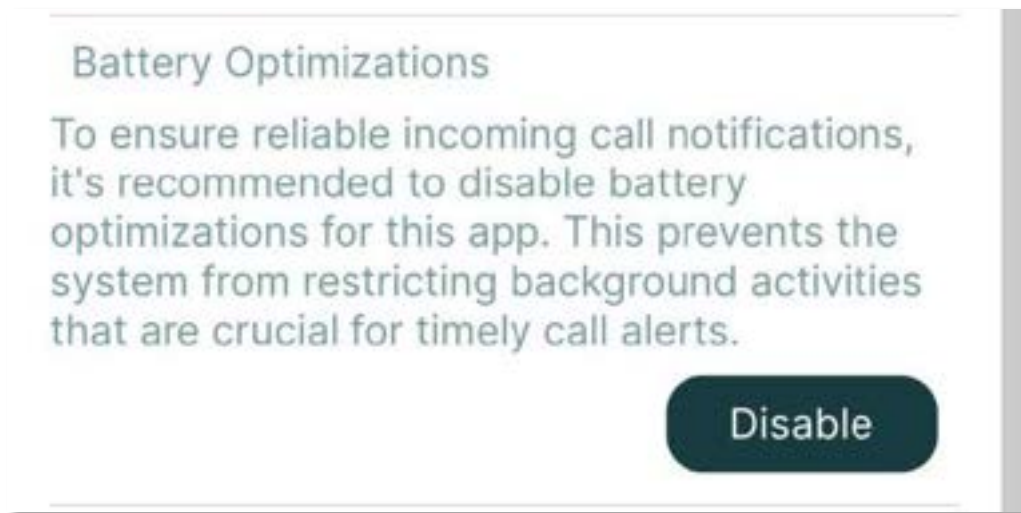
Ensure that 'Allow background data usage' is switched on:



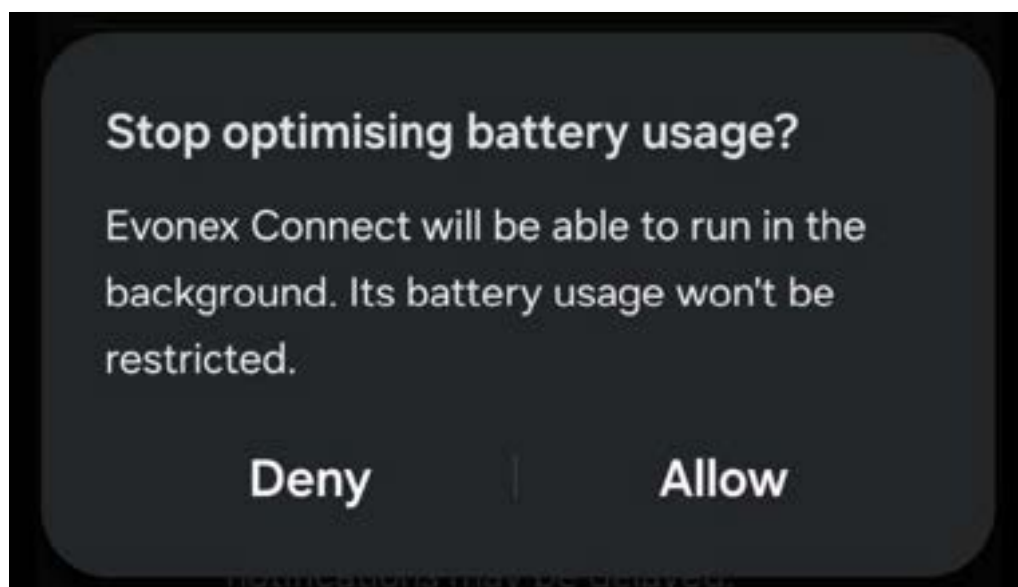
6 – Turn off battery optimisation

The most recent versions of Android will automatically enable battery optimisation for all apps when they are installed. 'Battery optimisation' is Android's method of reducing the amount of power consumed by an app and therefore increasing battery life. The downside of this is that the performance of an app can be reduced too. It's possible, therefore, that Push notifications could be delayed or missed if an app's battery setting is 'Optimised'.

We have provided an easy way to disable battery optimisation for Evonex Connect. Within the app, go to 'Settings -> System' and tap the 'Disable' button



Then tap 'Allow'



This will set the Battery Optimisation setting to 'Unrestricted' for Evonex Connect.

7 – Disable VPN and Antivirus software

What does VPN software do? In basic terms, it will hide your public IP address to keep you safer when browsing the internet. It does this by encrypting all data that enters and exits your phone via the Internet and routing it via a remote server, which makes it harder for websites to track your usage online. The VPN server could be anywhere, even in a different country.

Although using VPN software could be seen as general good practice, it can cause VoIP applications, such as Evonex Connect, to perform poorly. As mentioned previously, Evonex Connect (and all VoIP apps) rely on Push notifications to receive calls. VoIP also requires a good quality connection to the Internet to establish a call with good voice quality and no missed parts of the conversation. VPNs can slow down your connection and introduce latency (round-trip delay). Latency then causes packet loss or 'jitter' which results in the issues above, and a generally poor experience with VoIP.

What does Antivirus software do? AV software aims to protect your device from websites, emails and apps that contain a virus. There are many different types of virus, but most rely on a user being unaware of the risk or being tricked by a genuine-looking website, email attachment or app. Good AV software will incorporate a database of known vulnerabilities and automatically block any spurious data while allowing any data that is deemed safe.

Again, theoretically AV apps are a good idea, however some behave in a way that can have an adverse effect on the performance of VoIP or the Android device in general. Whilst we do not recommend you stop using an AV app completely, we do ask that you consider the implications of using an AV app that might be doing more harm than good. If it's possible to add 'exceptions' to a list in the AV app, we would recommend adding Evonex Connect to that list which should then avoid it being checked and allow its data.

What could you do? To help you identify if you have one, examples of applications that have VPN and/or Antivirus capabilities for Android include, but are not limited to: Avast, Aura, Avira, AVG, Bitdefender, CyberGhost, Kaspersky, Malwarebytes, McAfee, NordVPN, Norton, Sophos, Surfshark, TotalAV, Trend Micro, etc.

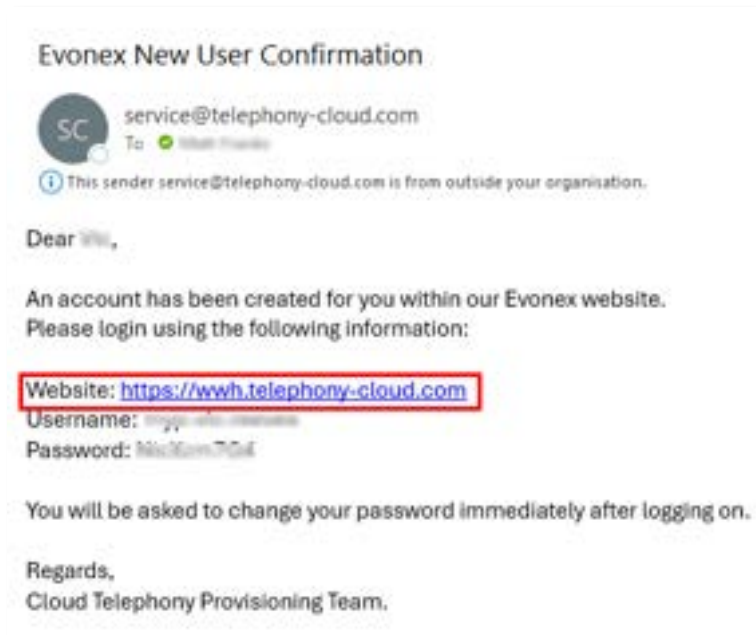
The above list is not intended to be a list of recommended apps - we do not recommend any VPN or Antivirus apps for the reasons mentioned above.

If you're having problems with Evonex Connect, please try disabling your VPN and/or Antivirus app temporarily, or add an exception for Evonex Connect to your VPN/AV app.

Signing in to Evonex Connect

Signing in to Evonex Connect for the first time

When your Evonex user account is first created, your credentials will be sent to you via email. These credentials are used to access Evonex Connect and/or the Evonex Portal. If you have not received the email, or do not know your credentials, please contact your support team.



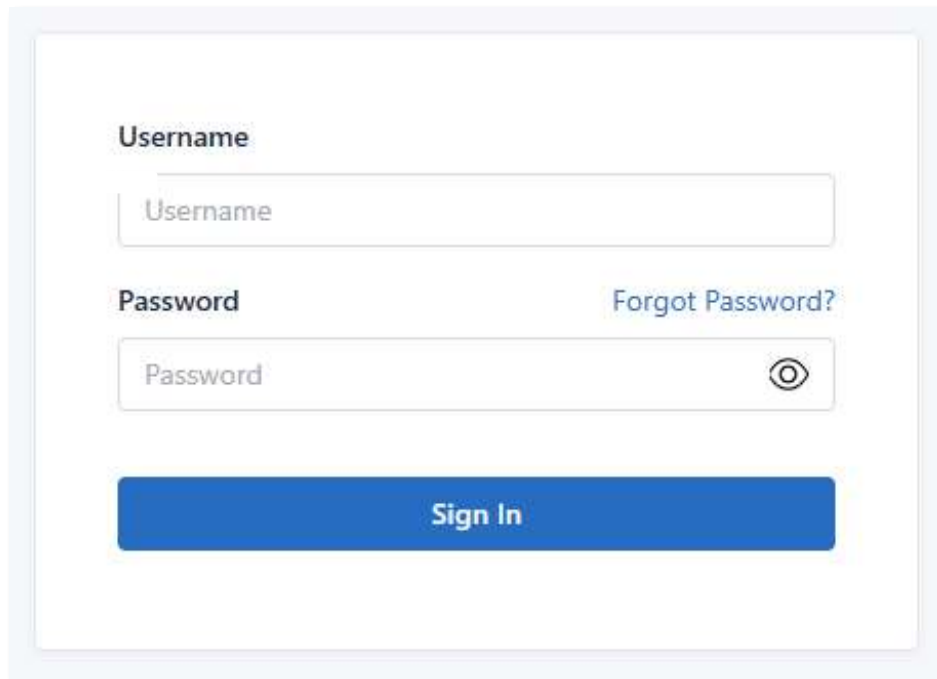
Example of an email with credentials to access the Evonex Portal



Example of an email attachment with the URL to access Evonex Connect – Portal credentials are also required

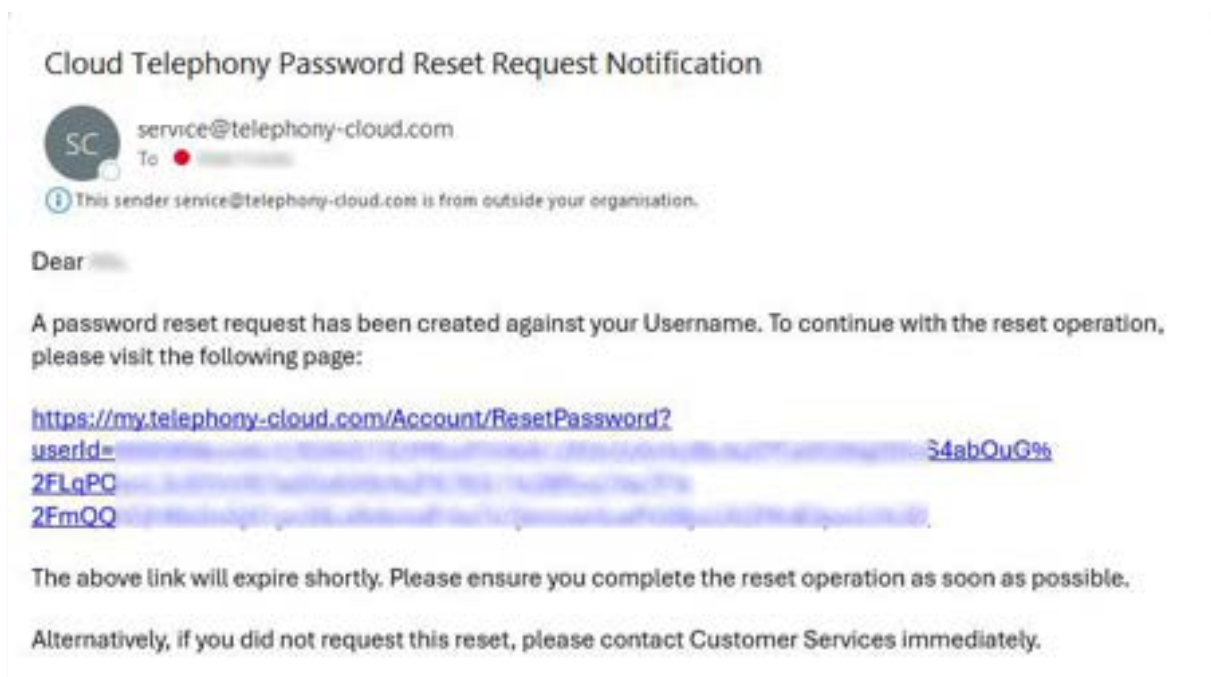
Click on the link in the email (outlined in red on the screen shots above) which will open a new browser tab and navigate to the selected website.

At the login window, enter your credentials as documented in the email. If you know your Username but have forgotten your password, please use the 'Forgot Password?' link at the logon prompt:

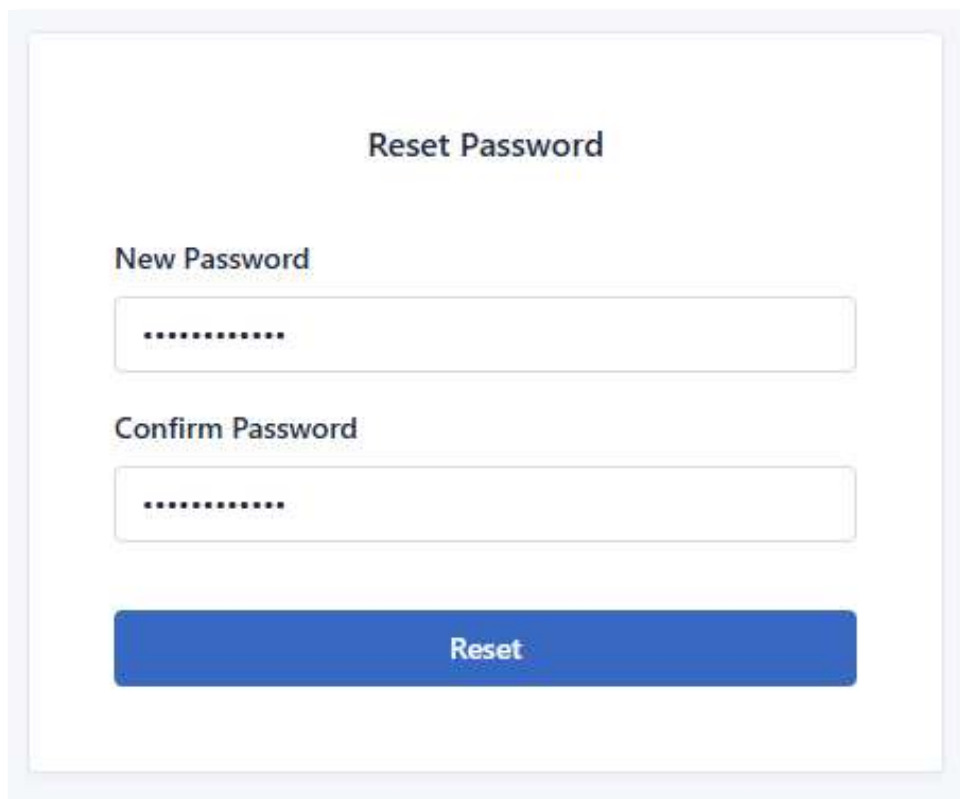


The login window is a light blue rectangular box. Inside, there are two input fields: 'Username' and 'Password'. The 'Username' field is a simple text box. The 'Password' field is a text box with a small eye icon on the right side. To the right of the 'Password' field is a blue link that says 'Forgot Password?'. Below these fields is a large blue button with the text 'Sign In' in white.

For security, you will be prompted to change your password at the first login. You will receive a further email with instructions. Click on the reset link in the new email you receive:

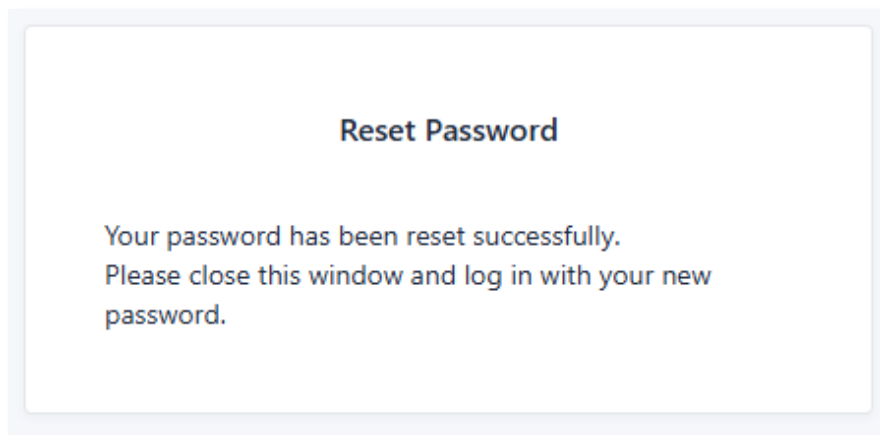


This will open a new browser tab. Enter your new password twice and click 'Reset':



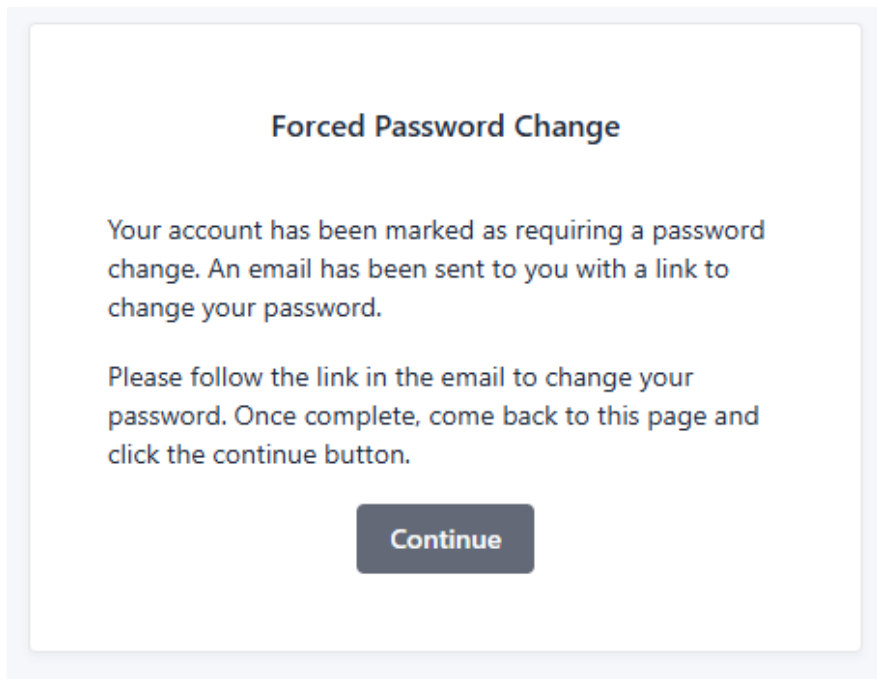
The image shows a 'Reset Password' form. It has a title 'Reset Password' at the top. Below the title, there are two input fields. The first is labeled 'New Password' and contains a series of dots. The second is labeled 'Confirm Password' and also contains a series of dots. At the bottom of the form is a blue button labeled 'Reset'.

If the password meets the required criteria, it will be accepted, and the password reset will be confirmed:



The image shows a confirmation message box titled 'Reset Password'. The text inside the box reads: 'Your password has been reset successfully. Please close this window and log in with your new password.'

Return to the 'Force Password Change' page and click the 'Continue' button. Alternatively, click the website link in the first email you received.



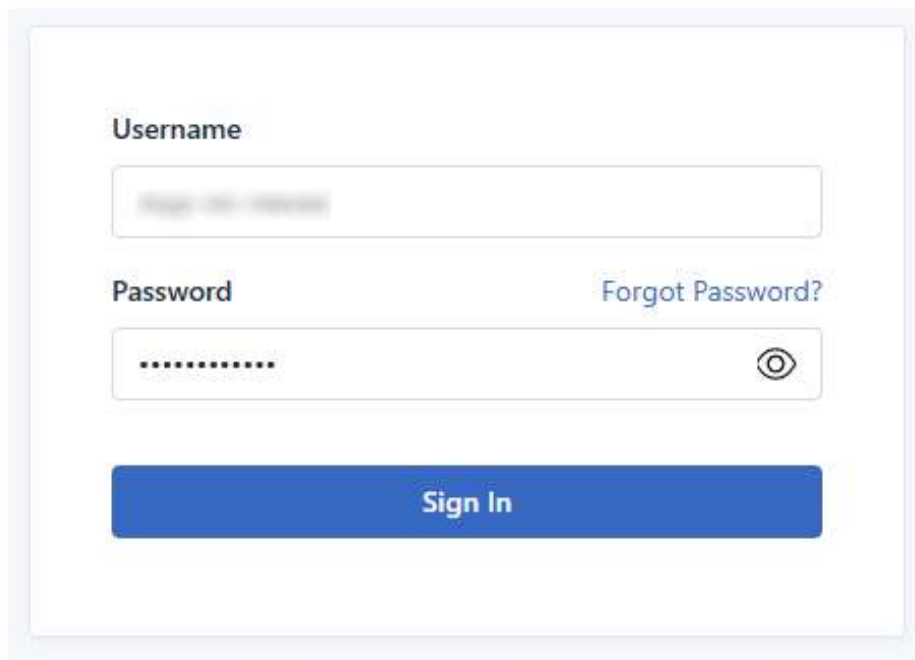
Forced Password Change

Your account has been marked as requiring a password change. An email has been sent to you with a link to change your password.

Please follow the link in the email to change your password. Once complete, come back to this page and click the continue button.

Continue

Enter your username and your new password, then click the 'Sign In' button.



Username

Password [Forgot Password?](#)

Sign In

2FA Setup & Configuration

The next step is to set up Two-Factor Authentication (2FA) which requires an Authenticator App to be installed on your mobile device or computer. An authenticator app can be downloaded from the App Store for your Operating System or by using your favourite search engine. Three popular examples are shown below, but others are available.



Google Authenticator



Microsoft Authenticator



Proton Authenticator

Using your chosen authenticator app, follow the instructions on-screen (shown below) and enter the resulting 6-digit confirmation code and click the 'Verify' button.

Two-Factor Authentication Required

To enhance your account security, we require Two-Factor Authentication (2FA).



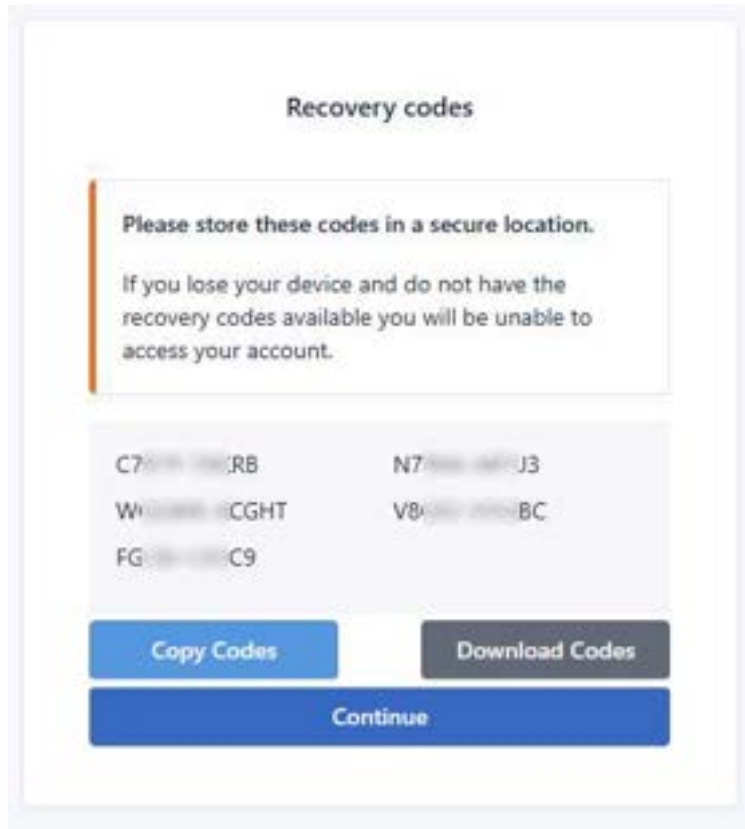
Scan the QR code using any authenticator app on your mobile device (e.g. Google Authenticator, Microsoft Authenticator, etc.) or enter the key manually.

(spaces and casing are not relevant)

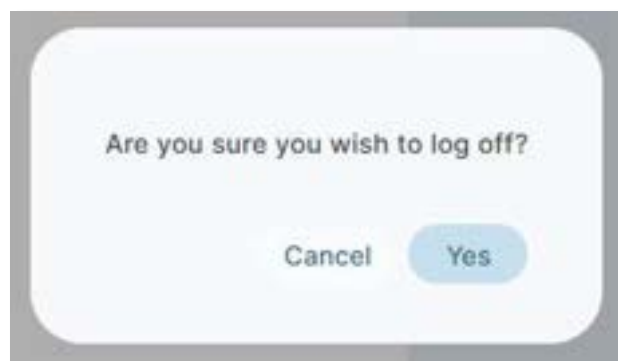
Enter the 6 digit confirmation code shown in the authenticator app:

Verify

You will now be asked to save and securely store the displayed recovery codes which can be used to gain access to your account if you lose your mobile device or access to your authenticator app. Either use the 'Copy Codes' button to copy them to your clipboard or use the 'Download Codes' button to save a text file to your computer.

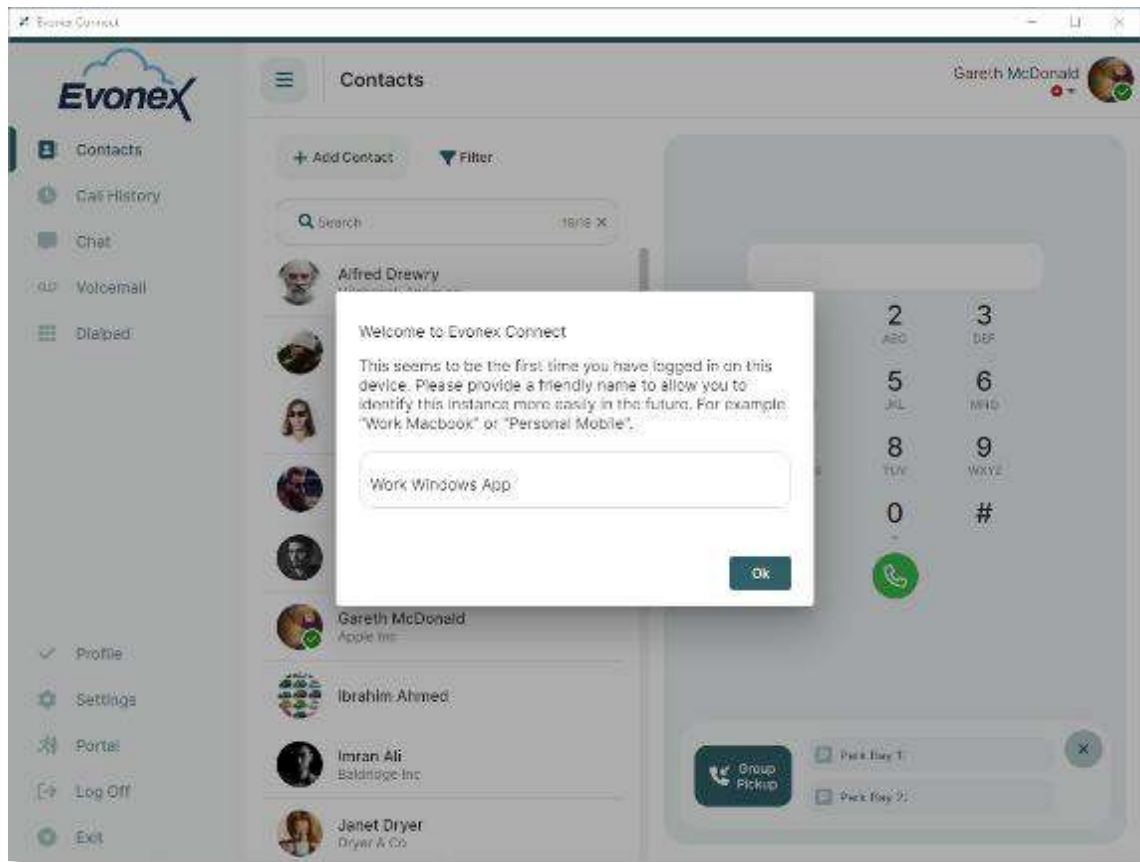


After saving the recovery codes, click Continue and you will be logged in to your account. As a security best-practice, always click 'Logout' when you are finished.

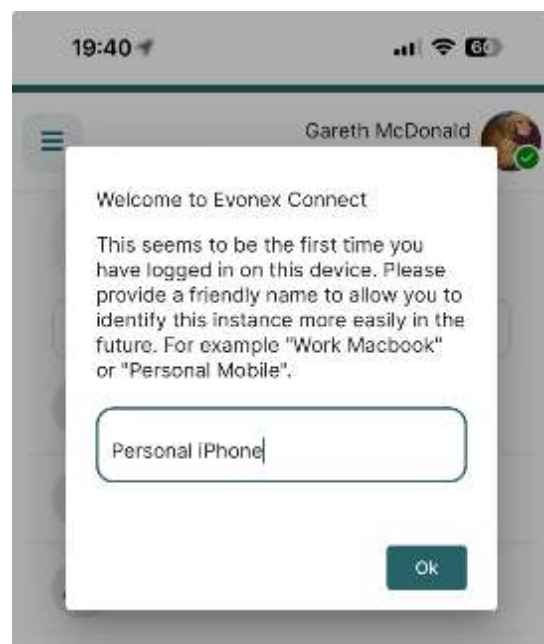


Following a successful 2FA setup, you'll be presented with a screen that looks similar to the one below. The message is prompting you to create a 'friendly name' for this device. This will allow you

to identify the devices you have logged into previously. You may manage the devices you have logged into via 'Settings' which will be covered later in this manual.



Desktop Browser/Windows App/MacOS App

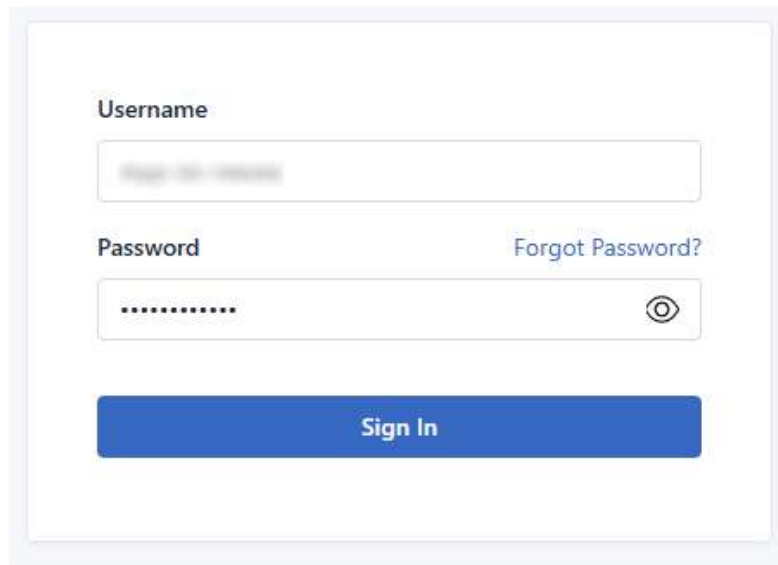


Mobile App

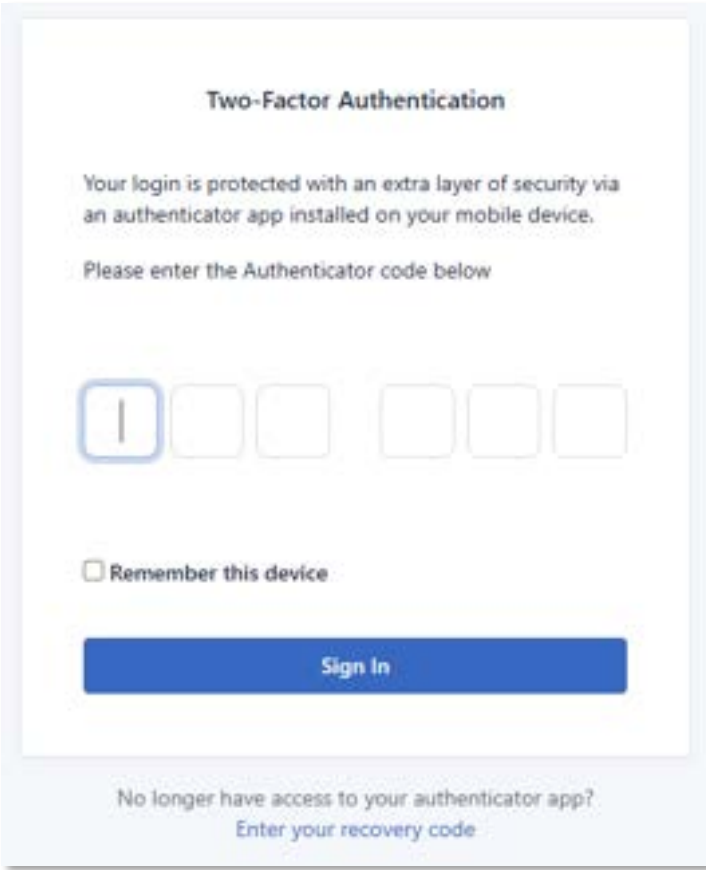
After entering a friendly name, you're ready to start using Evonex Connect.

Signing in subsequently

Use this process to log in to Evonex Connect regularly. At the login prompt, enter your username and your password, then click the 'Sign In' button.

A screenshot of the Evonex Connect login interface. It features a light blue border around the login area. At the top, the label 'Username' is followed by a text input field containing the placeholder text 'Enter the username'. Below this, the label 'Password' is followed by a text input field with masked characters '.....'. To the right of the password field is a link labeled 'Forgot Password?' and a toggle icon (an eye inside a circle). At the bottom of the form is a prominent blue button with the text 'Sign In' in white.

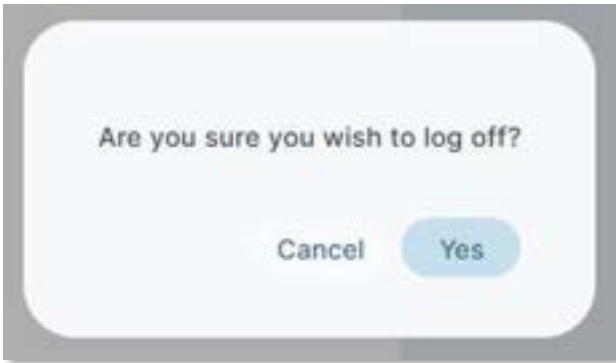
If it has been longer than 14 days since your last login, or you didn't tick the 'Remember this device' checkbox, you'll need to enter a valid authenticator code from the authenticator app on your mobile device, then click the 'Sign In' button.

A screenshot of a 'Two-Factor Authentication' login screen. The title 'Two-Factor Authentication' is centered at the top. Below it, a message states: 'Your login is protected with an extra layer of security via an authenticator app installed on your mobile device.' This is followed by the instruction 'Please enter the Authenticator code below'. There is a row of six input boxes; the first box contains a vertical line, and the others are empty. Below the input boxes is a checkbox labeled 'Remember this device'. At the bottom of the form is a blue 'Sign In' button. Below the button, there is a link: 'No longer have access to your authenticator app? Enter your recovery code'.

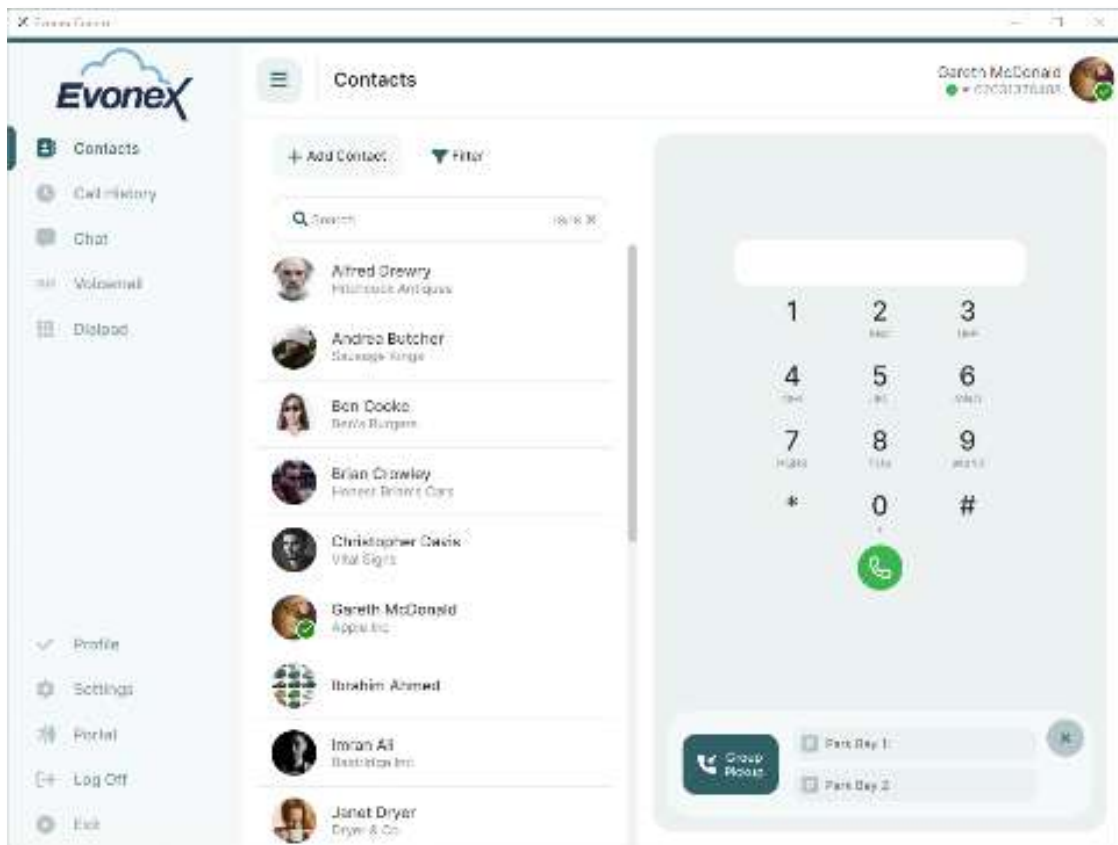
If you're logging in on a device which you last logged in on less than 14 days ago (and you ticked the 'Remember this device' checkbox), you will not be prompted to enter a one-time password. Therefore, your username and password are all that is required to log in successfully.

In this case, a secure token has been stored on your device, and this is providing the second factor of authentication. The token will be valid for 14 days from first use and is refreshed at every login. If you wait more than 14 days between logins, the token will expire, and you will need to enter a new one-time password.

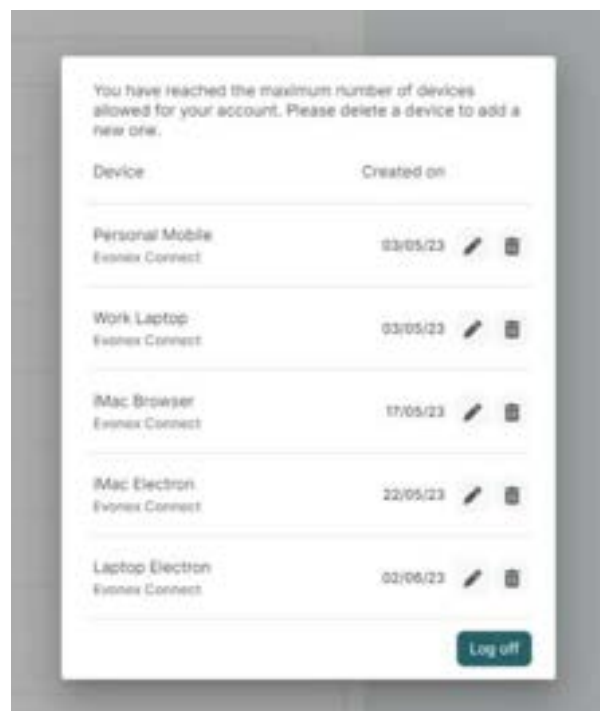
As a security best-practice, always click 'Logout' when you are finished:

A screenshot of a confirmation dialog box. It has a light blue background with rounded corners. The text 'Are you sure you wish to log off?' is centered. At the bottom, there are two buttons: 'Cancel' and 'Yes'. The 'Yes' button is highlighted with a blue gradient.

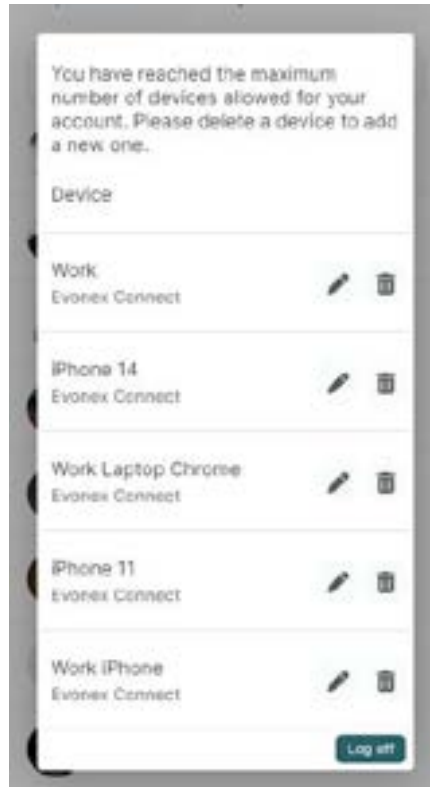
If you've signed in to this device before, you will be presented with a screen that looks similar to the image below – you're ready to get started.



The 'Manage Devices' page will be shown if you already have five other devices registered with your Universal License subscription. From here you can rename or delete an existing device. You will need to delete an existing device to continue logging on to this device.



Desktop Browser/Windows App/MacOS App



Mobile App

Tap the Log off button to return to the log in screen.

Please note, you may not delete a physical desk telephone. If you require this action, please contact your technical support team.

For the avoidance of doubt, a 'Device' is simply a method of signing in to, or registering with, your Universal License subscription. For example, one of the following:

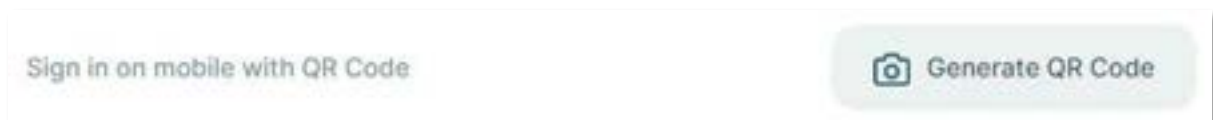
- A Physical Desk Telephone
- Evonex Connect via a Web Browser
- Evonex Connect for Windows
- Evonex Connect for MacOS
- Evonex Connect for iOS
- Evonex Connect for Android

Or any combination of the above, up to a concurrent maximum of five. Therefore, it is possible to sign in to Evonex Connect from the same physical computer using multiple different methods; Chrome Web Browser, Edge Web Browser and Windows app, for example. Each one of these different methods is considered a 'Device'.

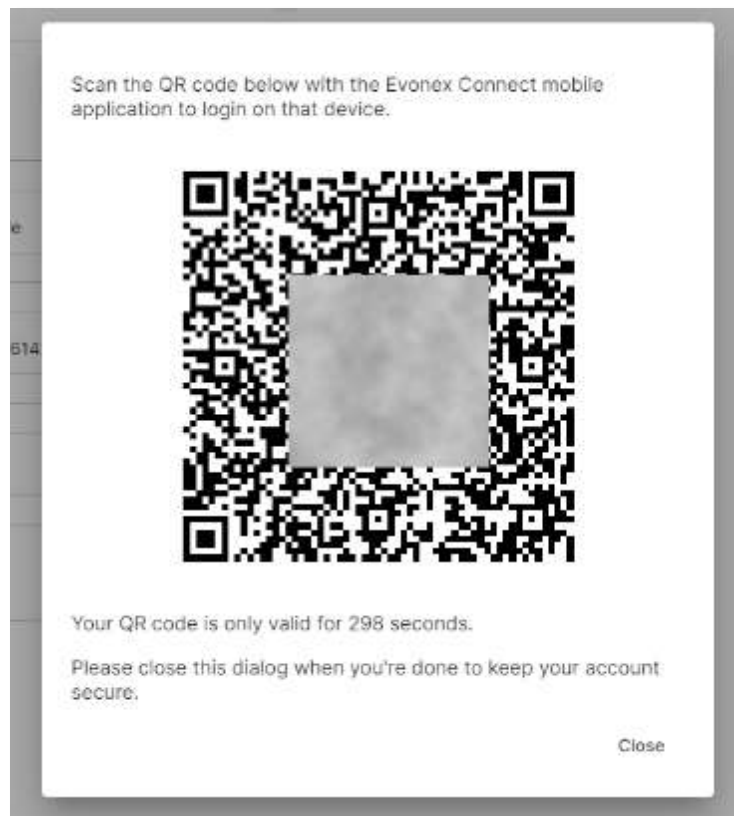
Signing in with a QR code

Your Evonex credentials are used to sign in on all device types. However, to facilitate signing in on mobile, without having to re-type your username and password, it is possible to generate a QR code in Evonex Connect for Web Browser, Windows or MacOS. You can then scan the QR code with the iOS or Android mobile app to sign in.

When you have logged in on your desktop Evonex Connect device, click on 'Profile' or 'Settings > Help' from the menu and locate the 'Sign in on mobile with QR Code' field.

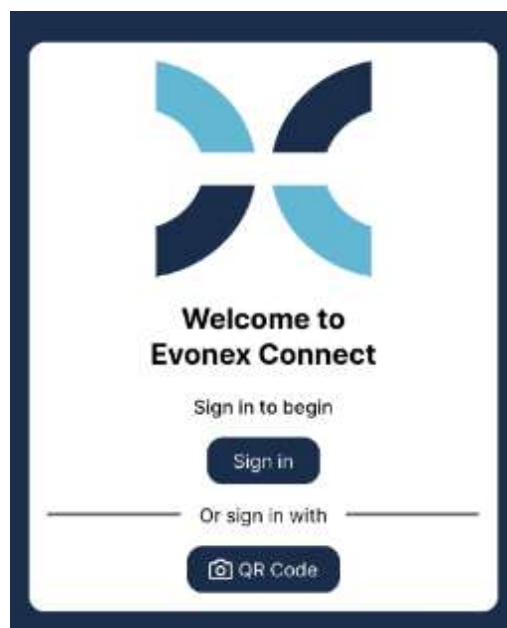


Click the 'Generate QR Code' button and a screen similar to the one below will be displayed:



Open the Evonex Connect app on your mobile device. If you have not yet installed the mobile app, please see the previous section for details on [how to download the app for iOS](#) or [how to download the app for Android](#).

At the 'Sign in' screen, tap the 'QR Code' button.

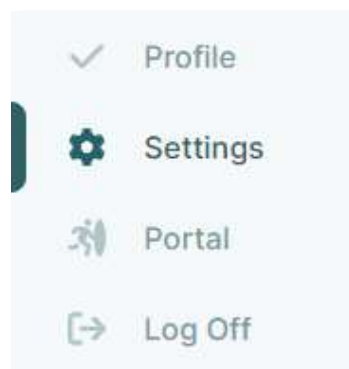


Align the QR on your desktop screen within the square shown on your mobile screen. Your sign in will be authenticated.

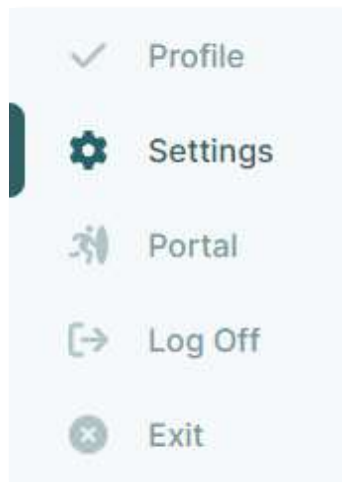
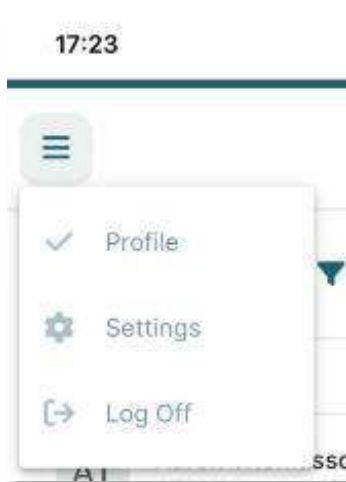


Exiting and Logging out

To log out of Evonex Connect, tap the 'Log Off' button in the bottom left corner of the web browser, Windows, or MacOS app. For the iOS or Android mobile apps, tap the 'Menu Options' button then tap 'Log Off'.



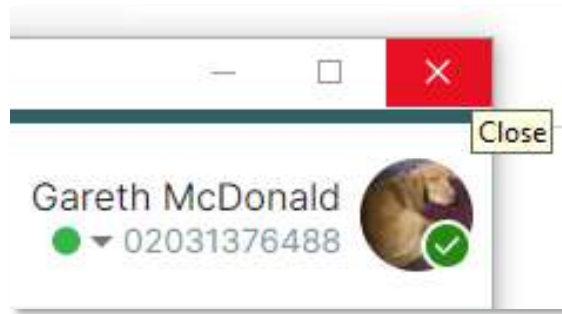
Web Browser

*Windows/MacOS App**Mobile App*

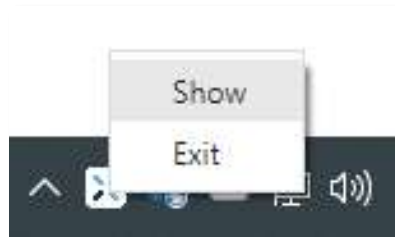
To exit Evonex Connect for Web Browser, simply close the web browser window or tab. If you ticked the 'Remember me' box when logging on, your credentials will be remembered the next time you log on.

For Evonex Connect for Windows or MacOS, click the 'Exit' button in the bottom left corner of the app.

Clicking the 'Close' X in the top right-hand corner of Evonex Connect for Windows will close it to the taskbar. Simply right click on the Evonex Connect icon in the taskbar to show or exit the app.

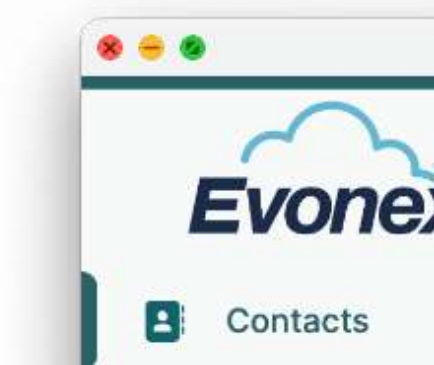


Windows App – Close minimises to the Task Bar

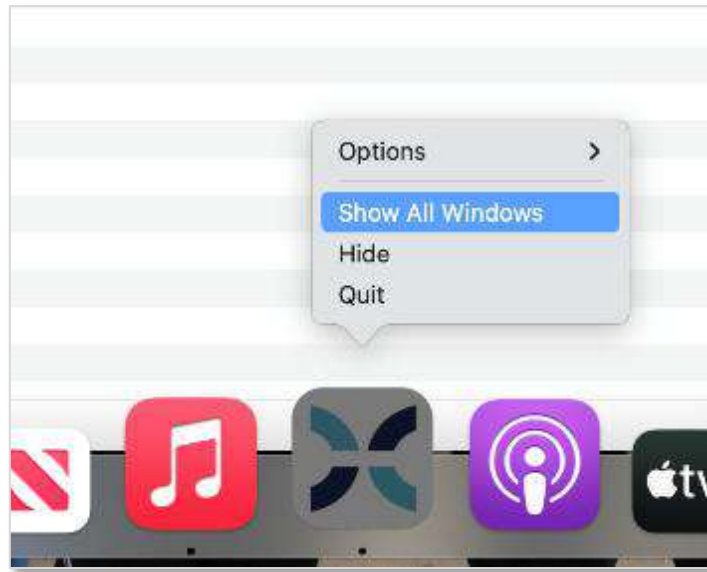


Task Bar options are Show or Exit

Clicking the orange minus button in the top-left corner of Evonex Connect for MacOS will minimise it to the Dock. Either click the Dock icon or right-click it and select 'Show All Windows' to maximise Evonex Connect.



MacOS – orange minus minimises to the Dock.



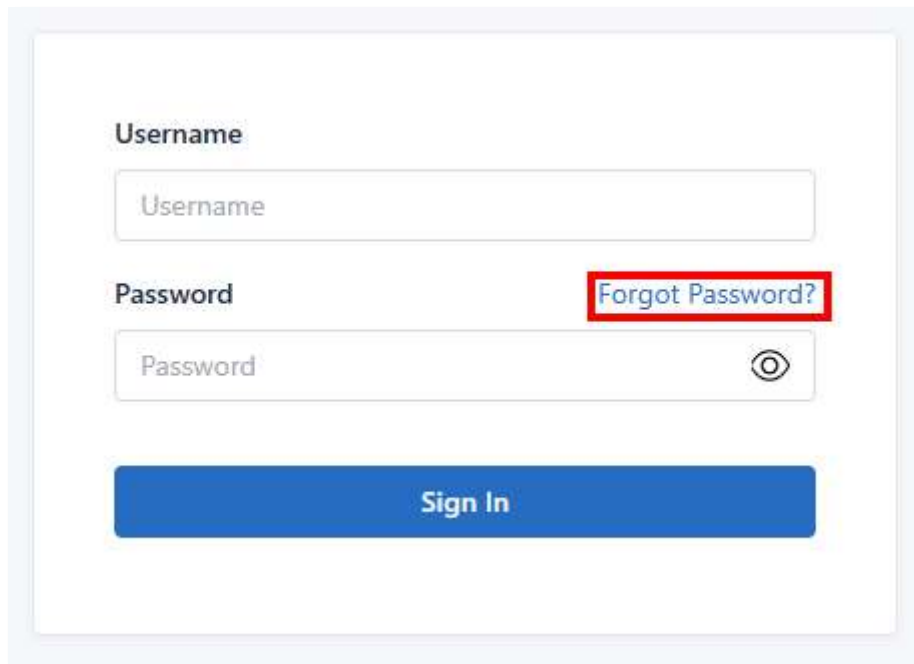
MacOS – click the Dock icon or 'Show All Windows' to maximise.

Please note that you will not receive any phone calls to the device if you have logged out of Evonex Connect. Similarly, you will not receive any calls if you close the browser window or tab, or the Windows or MacOS app.

If you log out of the iOS or Android mobile apps, you will not receive any calls to that device. If you wish to continue to receive calls while the app is closed, please don't log out before closing. Any new calls that arrive will wake/open the app via a push notification.

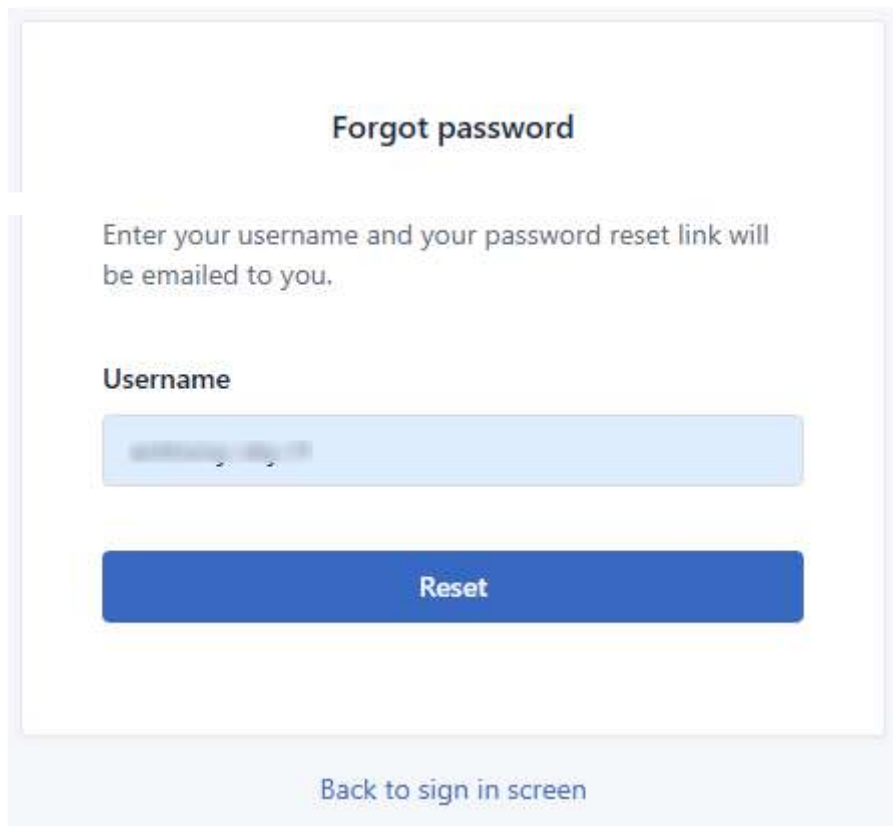
Resetting your password

If at any point, you forget your password and need to reset it, click the 'Forgot Password?' link at the 'Sign In' prompt as shown below highlighted in red.



The image shows a 'Sign In' form. It has two input fields: 'Username' and 'Password'. The 'Password' field has a toggle icon (an eye) to its right. A blue button labeled 'Sign In' is at the bottom. A red rectangular box highlights the text 'Forgot Password?' located to the right of the 'Password' field.

Enter your username and click 'Reset'.



The image shows a 'Forgot password' form. At the top, it says 'Forgot password'. Below that, it says 'Enter your username and your password reset link will be emailed to you.' There is a single input field for 'Username'. A blue button labeled 'Reset' is at the bottom. At the very bottom, there is a link that says 'Back to sign in screen'.

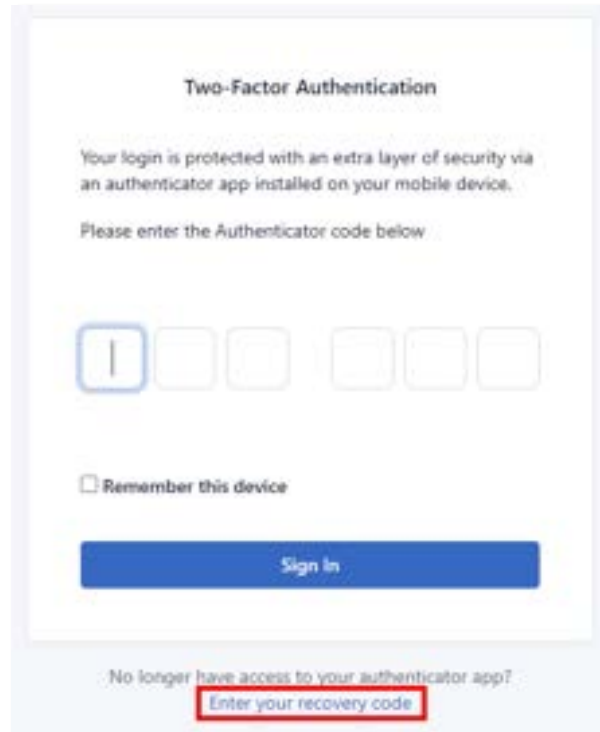
A password reset email will be sent to the email address registered to the username.

Please check your email for instructions on how to reset your password

Please follow the instructions [from page 44 of this guide](#) to complete the password reset process [and page 47 of this guide](#) to setup 2FA again.

Recovering your account

If you lose access to your authenticator app, you will need to recover your account and set up 2FA again. This can be done by clicking the 'Enter your recovery code' link at the 'Two-factor Authentication' stage of logging in, as shown highlighted in red on the screenshot below.



Two-Factor Authentication

Your login is protected with an extra layer of security via an authenticator app installed on your mobile device.

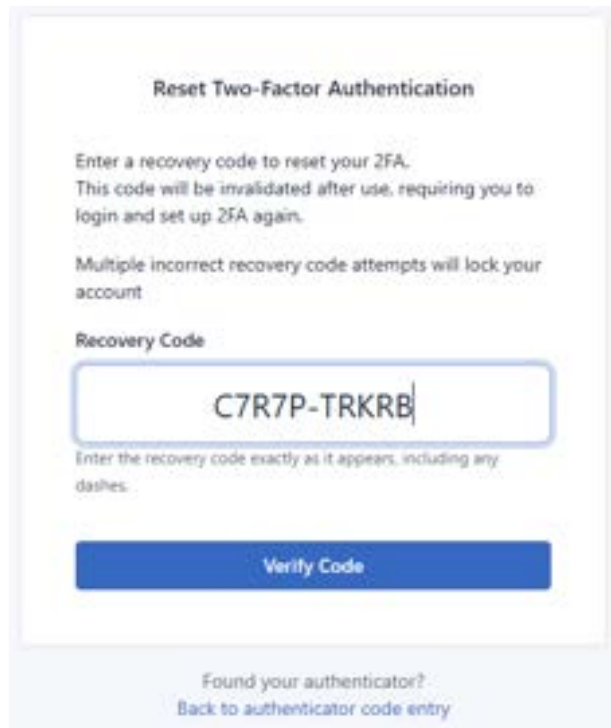
Please enter the Authenticator code below

☐ Remember this device

Sign In

No longer have access to your authenticator app?
[Enter your recovery code](#)

Enter one of the recovery codes which you saved and securely stored when you set up 2FA initially and click the 'Verify Code' button.



Reset Two-Factor Authentication

Enter a recovery code to reset your 2FA. This code will be invalidated after use, requiring you to login and set up 2FA again.

Multiple incorrect recovery code attempts will lock your account

Recovery Code

Enter the recovery code exactly as it appears, including any dashes.

Verify Code

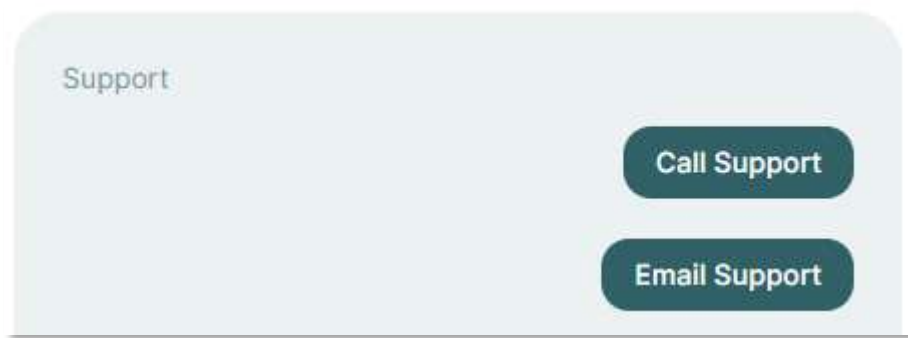
Found your authenticator?
[Back to authenticator code entry](#)

If the code is accepted, it will now be necessary to set up 2FA again. [Please follow the instructions from page 47 of this document.](#)

If you need further assistance, please contact your provider's support team.

Technical Support

If at any point you require technical assistance, please contact your provider's support team. If you're not sure of their contact details, we've provided you with handy 'Call Support' and 'Email Support' buttons with the app.



To find these, please open Evonex Connect and navigate to 'Settings > Help' and locate the 'Support' section.

Clicking the 'Call Support' button will start a call to your provider's support telephone number.

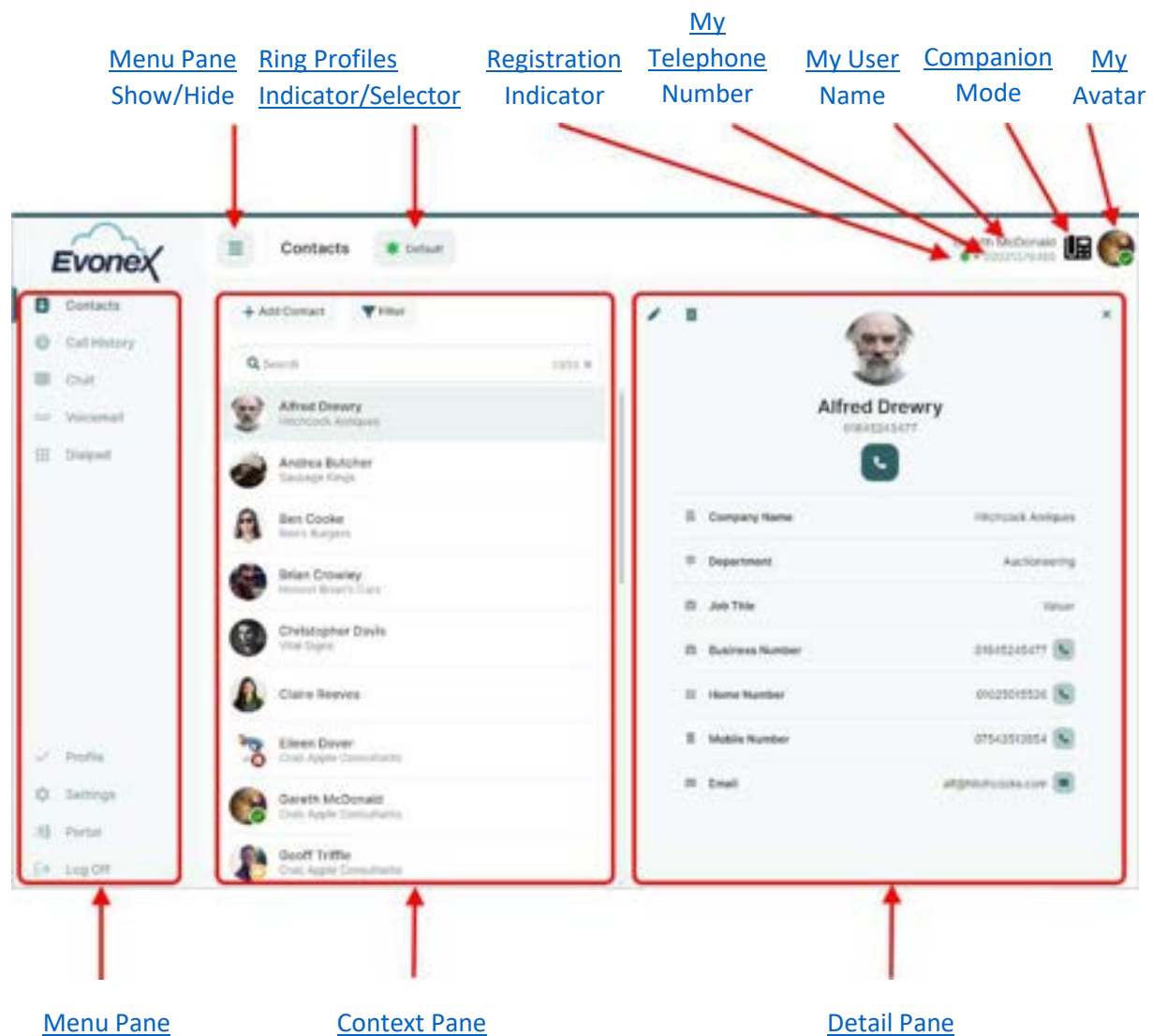
Clicking the 'Email Support' button will open a new email window addressed to your provider's support email address.

Using Evonex Connect for Web Browser, Windows or macOS

Layout

To assist you in familiarising yourself with the layout of Evonex Connect, we've provided an annotated diagram of the key points, as viewed in full screen or desktop mode. Please use the links in the annotations to jump to a description of each point.

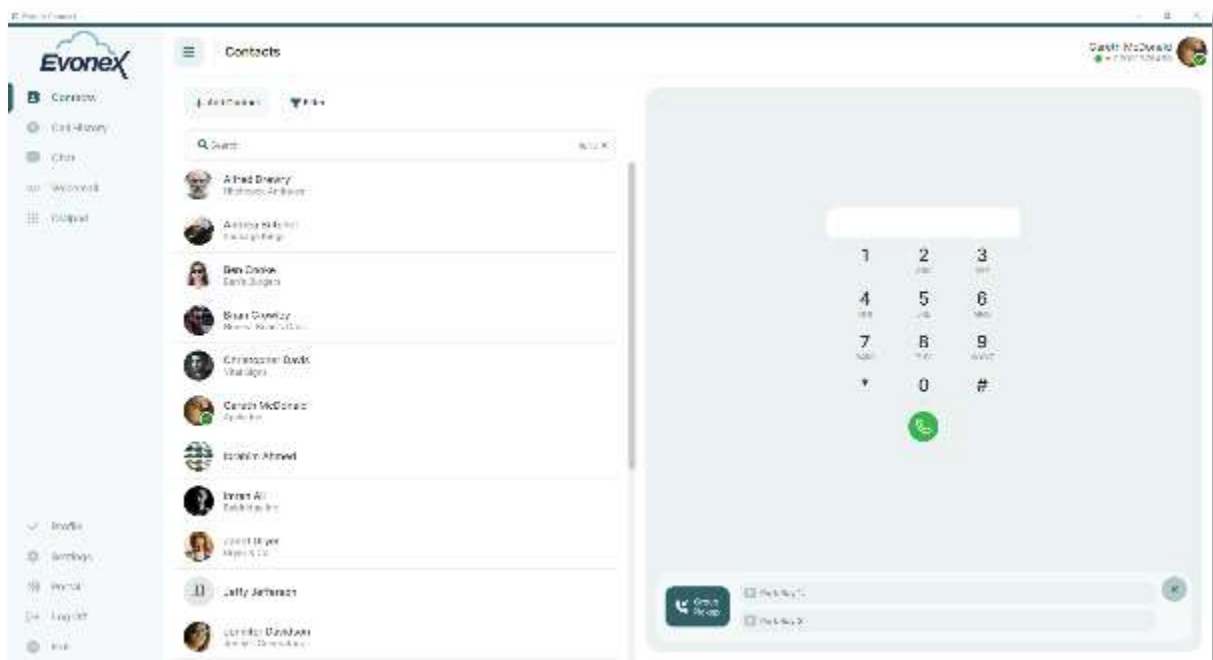
The images shown in this section are taken from Evonex Connect for Windows but are applicable to all desktop versions. Any differences between versions are highlighted where required.



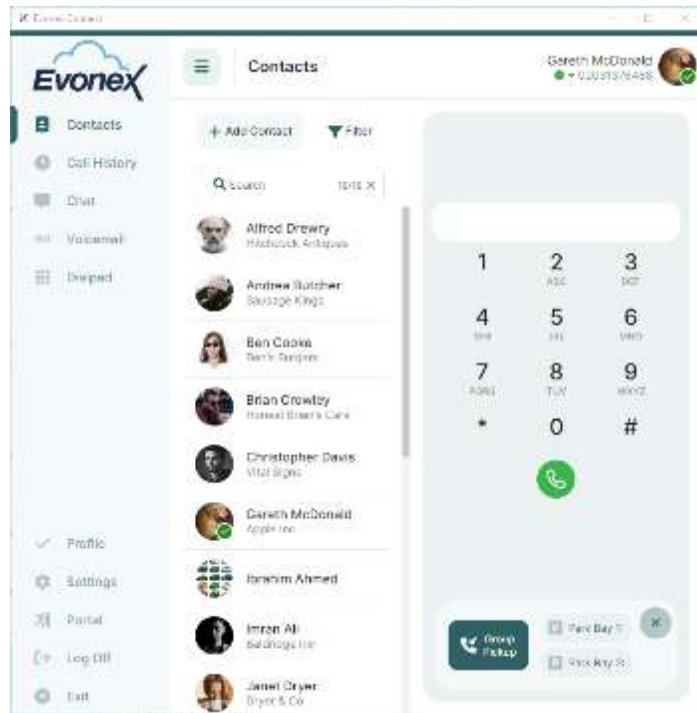
Design Responsiveness

As mentioned at the beginning of this document, Evonex Connect functions across many different environments and platforms. We've achieved this by writing a single, common codebase and using different frameworks to house that code in each environment. Therefore, we needed to ensure Evonex Connect could 'fit' in any potential screen size and ensure the 'Panels' resize appropriately as the application is resized on screen.

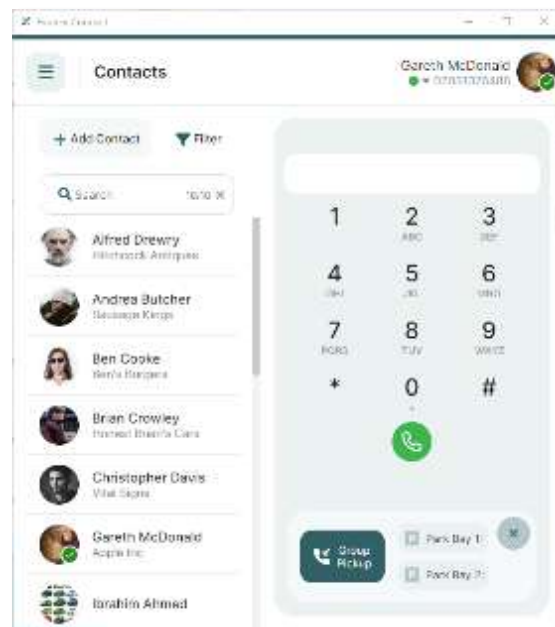
Below are examples of how the layout of Evonex Connect changes as the app is dynamically resized on-screen by dragging the top and sides.



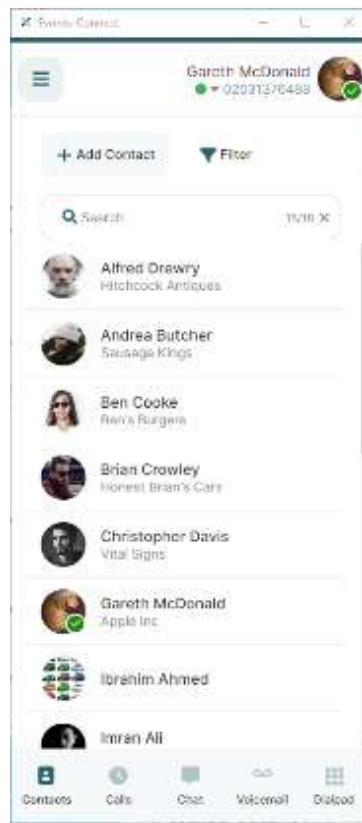
Full screen – maximised to consume as much space as possible. All 'Panels' have plenty of room to display as much information as they contain.



Half screen – shows the Evonex Connect window reduced to consume approx. half of the screen space of the full screen image above. Still, plenty of room for everything to be displayed, just takes up less of your desktop. 'Panels' are narrower consequently.



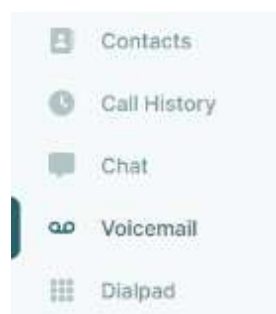
Third of screen – width and height further reduced to minimise screen space. The Menu Pane has now shifted behind the Context Pane - use the Menu show/hide button to reveal. Still enough room to be useable.



Mobile view – resized sufficiently such that the mobile view has automatically been adopted. The Menu Pane has now dropped to the bottom of the app. All features and functions still available, just in a different form factor – exactly as viewed in the mobile apps.

Menu Pane

The Menu Pane is the area on the left-hand side of the screen that presents menu options which, when clicked, are displayed within the Context Pane in the middle of the screen.

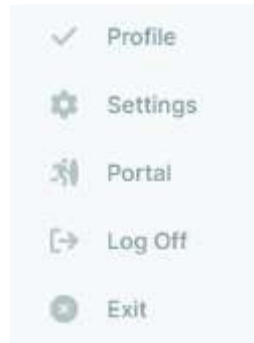


Menu options consist of [Contacts](#), [Call History](#), [Chat](#), [Voicemail](#), [Dialpad](#), [Profile](#), and [Settings](#) which are all covered in their own respective parts of this guide – please use the links to jump to each section.

The Desktop versions of Evonex Connect also contain a 'Portal' button in the Menu which opens a new window and logs you in to the portal to allow you to make user configuration changes not available within Evonex Connect.

The 'Log Off' button can be used to ensure this device is not used when you are away from it or to stop a device from ringing.

Lastly, the 'Exit' button closes Evonex Connect.



Context Pane

The Context Pane is sensitive to the option selected in the Menu Pane. In other words, it displays information relevant to the item that has been selected in the Menu Pane.

For example, selecting the Contacts option from the Menu Pane displays a list of Contacts in the Context Pane. Or, selecting the Call History option from the Menu Pane displays a list of Call History items in the Context Pane, etc.

The Context Pane also includes additional control options like the ability to perform an alphanumeric search in Contacts and Call History, filter different directories in Contacts and create new messages in Chat. You can also perform functions specific to each item in the list, for example call back a Call History item or delete or play a Voicemail message.

Detail Pane

The Detail Pane is sensitive to the item selected in the Context Pane. In other words, it displays information relevant to the item that has been selected in the Context Pane.

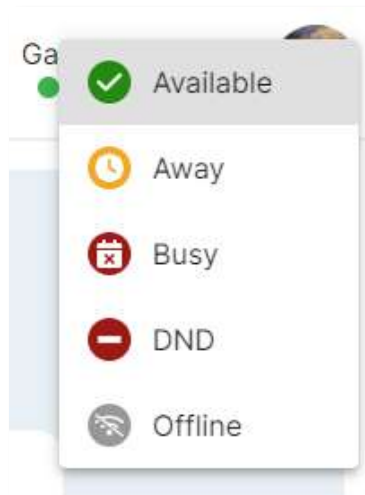
For example, selecting a specific contact entry in the Context Pane displays the detail of that contact in the Detail Pane, including the contact's name, telephone number, company name, additional numbers, email address, etc. Or, selecting a voicemail entry from the list in the Context Pane displays the detail of that entry in the Detail Pane, including the caller's telephone number, date, time, etc.

The Detail Pane also includes additional control options like the ability to type and send messages in Chat or play, download or read a transcription of a Voicemail message.

When no item is selected in the Context Pane, the Dialpad is displayed in the Detail Pane.

My Avatar

You may upload an image to your [Profile](#) to allow your colleagues to identify you more easily. The image can be in any commonly used image format such as .jpg, .png, .bmp, etc. The image is synchronised to all your Evonex Connect logins on any platform or operating system. Your presence is also displayed in the bottom right-hand corner of your Avatar. Click the Avatar image to change your presence.



Companion Mode Indicator



The presence of a telephone button to the left of your Avatar indicates that Companion mode is enabled. In this mode, any calls you make via Evonex Connect will be made through your desk phone. Can also interact with an active call to hold or end it, for example. Click this button to be taken to the Profile menu where you can disable Companion Mode should you wish. For further details see the [Companion Mode](#) section.

My User Name

The name of the user that is logged in to Evonex Connect.

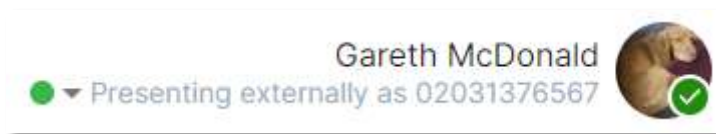
My Telephone Number

This is the telephone number of the Universal License associated with your user. Depending on settings made by your administrator, you may see either your DDI or your extension number here. Callers can dial this number to reach you on any of your five registered and logged in devices (Ring Profile permitting).

By default, this is the number that is presented as the outbound caller ID when you make an external call, but your administrator can change this.



To change your outbound caller ID dynamically, click on the drop-down arrow and select another number from the list of presentation numbers. The numbers that are available to select here are chosen by your administrator. When you change your presentation number on one of your Evonex Connect clients, this will synchronise to your other clients automatically. 'Caller ID:' will be displayed instead of your telephone number, until you select another number or select 'Default' which disables dynamic number presentation.



You may also select 'Withheld' to ensure calls are made not presenting any caller ID.



Your administrator can control the numbers you're able to present in this list and they may even choose a number other than your own as your default presentation number. In this case, when you select 'Default' from the drop-down list, 'Caller ID:' will be shown rather than your DDI or extension number.

Lastly, your administrator may remove your ability to present any numbers other than one they specify; this is your default. In this case, there will not be a drop-down arrow and 'Caller ID:' will be permanently shown. You can still discover your own number by going to ['Profile > My Number'](#)



More details can be found in the [Number Presentation](#) section of this guide.

Registration Indicator

Usually this is a green circle which indicates your device is registered with the system and ready to take calls.



While your device is trying to register, the indicator will be orange.

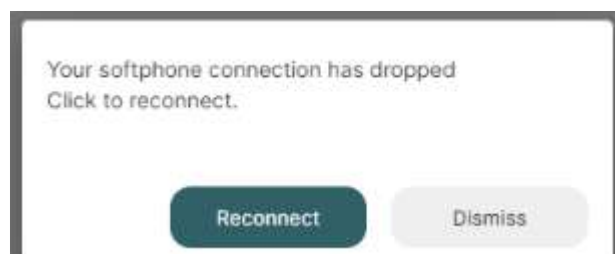


Sometimes, this changes to a red circle which indicates registration has failed. This is normally because your network cable has become disconnected, or WiFi is off.



When the network connection returns, Evonex Connect will attempt to reconnect and the indicator will turn green again.

If Evonex Connect is unable to automatically restore its registration, a message will popup asking you if you wish to manually attempt to restore the connection. Click Reconnect to retry or Dismiss to ignore.



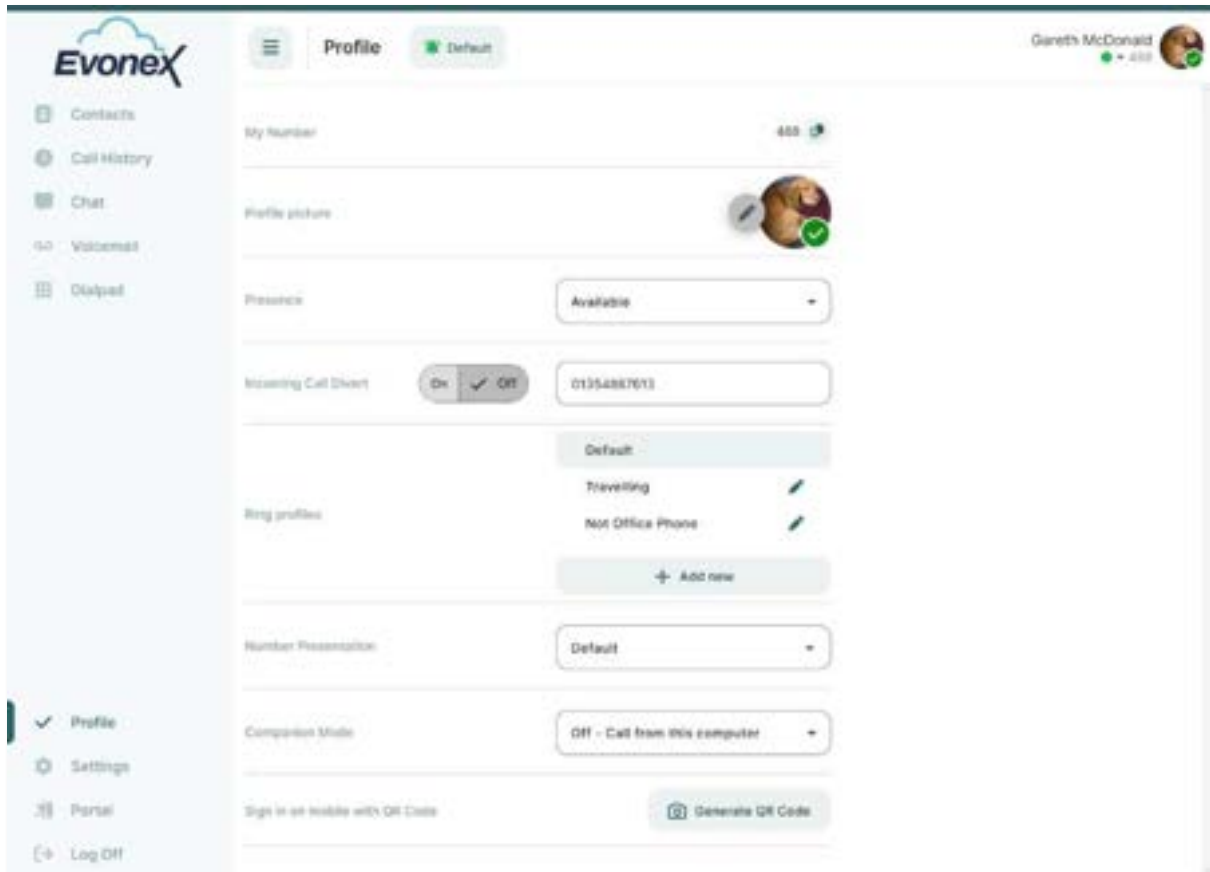
If you wish to force re-registration at any time, click the circle.

Menu Pane Show/Hide

Toggles display of the menu pane on the left-hand side of the screen.

Profile

Selecting the Profile option from the Menu Pane will take you to the Profile screen. From here you can perform such tasks as change your Profile Avatar picture, modify your Presence, toggle a call divert on/off, manage your Ring Profiles, Adjust your presentation CLI, enable Companion Mode and facilitate easy login for your mobile device via a QR code.



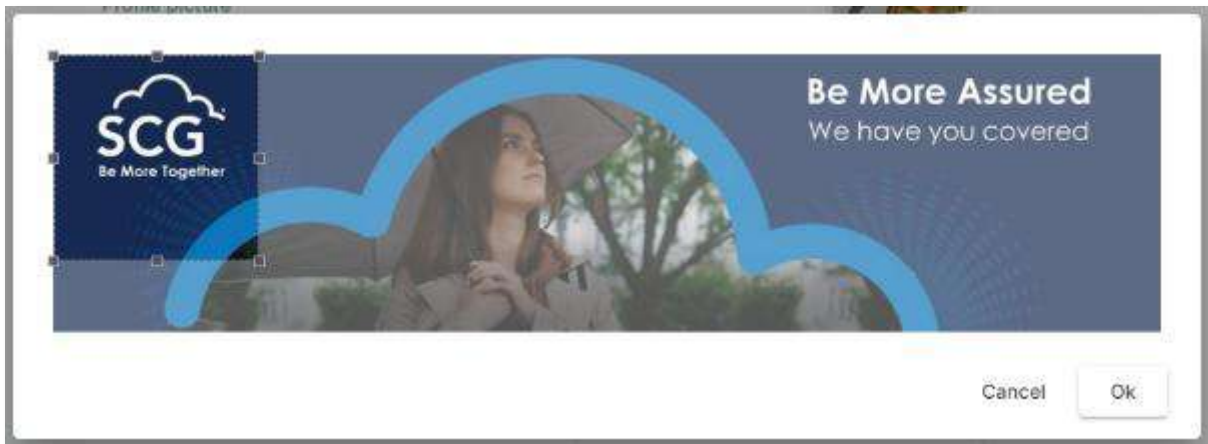
My Number

This simply allows you to view your telephone number and copy it to your clipboard. Click the copy button to do so.

Profile Picture

To change your Profile Avatar picture, click the 'Edit' button to the left of the Avatar. An Explorer window will appear prompting you select an image from your computer. Select one and click 'Open'.

Next, you can select a portion of the image by moving the selection square and resizing it appropriately.

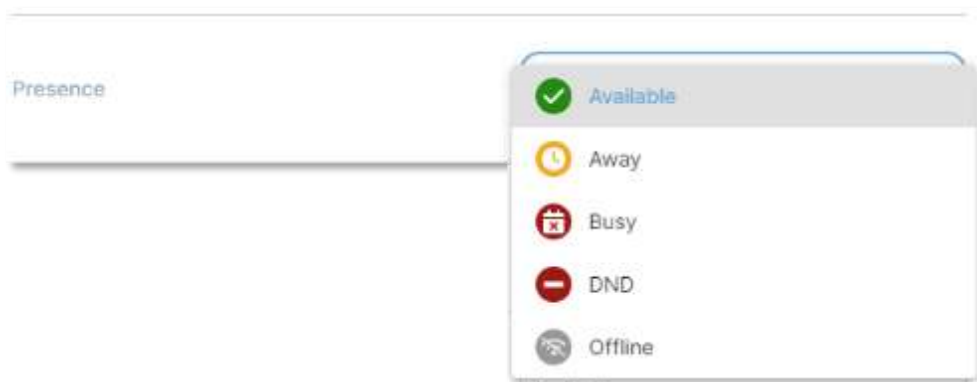


Click 'Ok' and the portion of the image you have selected will be uploaded as the new Profile Avatar picture. This will also be reflected in the top right-hand corner of Evonex Connect.

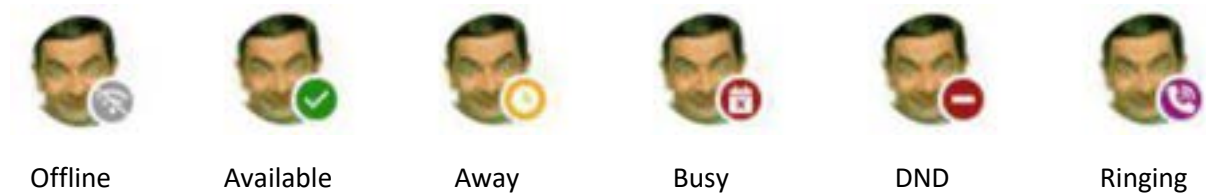


Presence

There are six Presence states available, five of which can be manually selected by clicking the drop-down menu: 'Offline', 'Available', 'Away', 'Busy' and 'DND'. The 'Ringing' Presence state is updated dynamically. The 'Busy' Presence state can be updated dynamically or manually.



When a Presence state is selected, the Avatar is updated with the following badges in the bottom-right-hand corner.



The Presence states are designed to aid your colleagues when, for example, they have a call they wish to transfer to you – knowing you are ‘Away’ or ‘Busy’ saves time as it’s unlikely you’ll be able to take the call.

Your Presence is reflected on all Evonex Connect instances you are currently logged into so, no matter which device you’re using, your colleagues will always see your Presence accurately.

The ‘Ringing’ Presence status also assists your colleagues in answering a call when it may be ringing at a phone that is unlikely to be answered. They can use the ‘Group Pickup’ button on the Dialpad screen to do this, which will be covered later in this manual.

Do Not Disturb

Setting your Presence to ‘DND’ (also known as Do Not Disturb) forwards your calls directly to voicemail. DND is synchronised to and reflected on any desk phones and other Evonex Connect devices you have on your Universal License.

Therefore, DND can be enabled or disabled on any of your devices, and it will update all your other devices automatically. Enabling or disabling DND also updates the ‘Forward all Calls to Voicemail’ setting within the portal, and vice versa.

When DND is enabled, your Avatar picture gains a ‘No entry’ badge and the words ‘Diverting calls to Voicemail’ are shown on all your Evonex Connect devices.

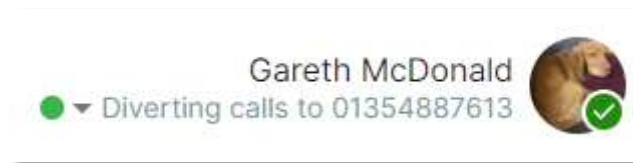


Incoming Call Divert

Use the 'Incoming Call Divert' feature to send calls destined for your number to an alternative number. This could be the number of one of your colleagues, or your mobile number, for example. Simply type the desired destination number (full or extension number) into the text field and use the 'On' and 'Off' toggle as desired. The destination number is saved until you wish to change it.

A screenshot of a user interface for 'Incoming Call Divert'. It features a label 'Incoming Call Divert' on the left. To its right is a toggle switch with 'On' and 'Off' labels; the 'Off' button is highlighted in grey. Further right is a text input field containing the number '07' followed by a blurred extension and ending in '0'.

Your 'Incoming Call Divert' state is reflected on all Evonex Connect instances you are currently logged into so, no matter which device you're using, you will always be reminded of your call divert state accurately.



It is also synchronised to and reflected on any desk phones you have on your Universal License. Therefore, a divert can be enabled or disabled on any of your devices, and it will update all your other devices automatically. Enabling or disabling a divert also updates the 'Divert all calls unconditionally to another number' setting within the portal.

Ring Profiles

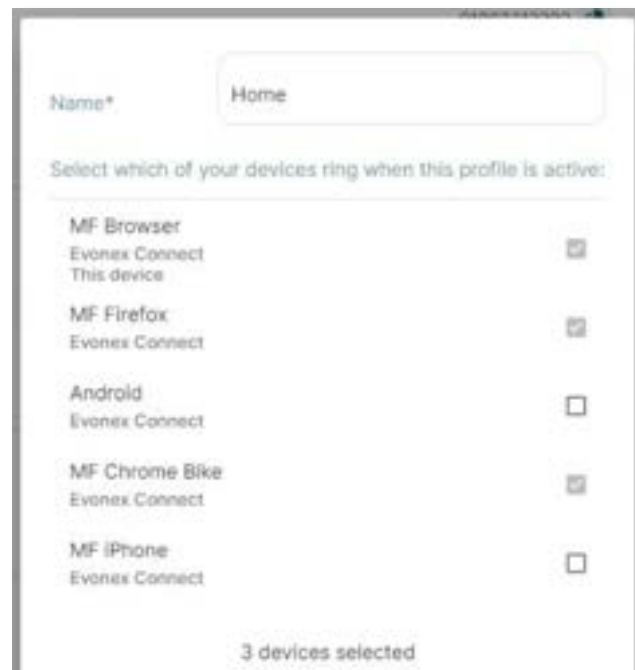
Ring Profile Administration

Ring profiles is a feature that allows you to decide which of your devices will ring for incoming calls. You may include different devices in different Ring Profiles and change the active Ring Profile as you require. For example, you're working from home, and you don't want your office desk phone to ring but your other devices should all ring. Or maybe you're focussing on an important document, and you don't want the distraction of Evonex Connect ringing on your desktop, so you only want the mobile app to ring.

There is a 'Default' ring profile which automatically contains all of your devices. When you receive a call, all of your devices will ring concurrently when the 'Default' Ring Profile is active. The Default Ring Profile cannot be edited.



To create new Ring Profile, click the '+ Add new' button, give the Ring Profile a name, select the devices you want to be members of the Ring Profile by checking the box next to each device, and click Save. Any devices you do not include in the Ring Profile will not ring when this profile is active.



To edit a Ring Profile, click the 'pencil' edit button next to the Ring Profile name.

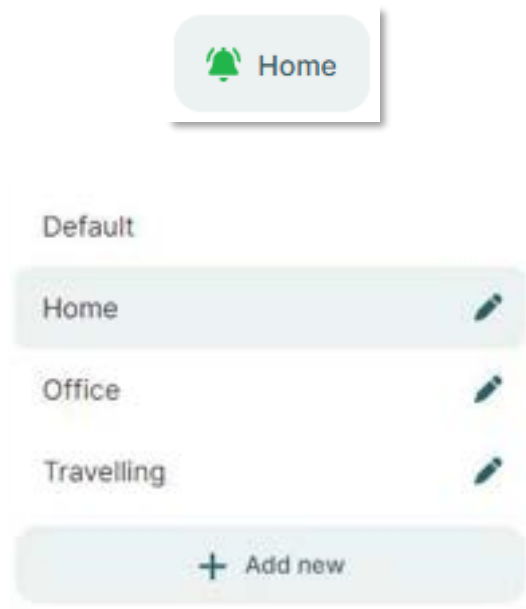


You may change the name of the Ring Profile, add device members to, or remove device members from the Ring Profile by checking/unchecking the boxes next to each device, as required. You may also click the 'trash can' delete button to remove the Ring Profile.

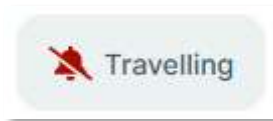


Ring Profile Activation

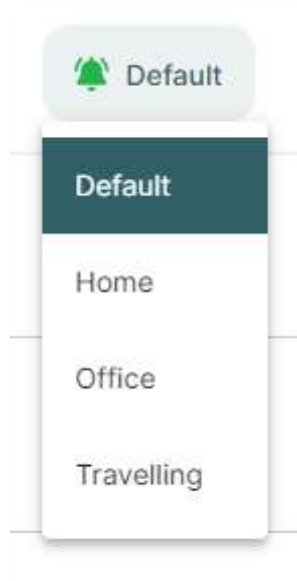
The Ring Profile indicator button is located at the top of Evonex Connect with the name of the currently active profile shown. The active Ring Profile is also shown highlighted in the Profile Menu.



This indicator will either be a green bell, which indicates this device is in the active Ring Profile and will ring for incoming calls, or a red bell which indicates this device is not in the active Ring Profile and will not ring for incoming calls.



Click the Ring Profile indicator button to view a list of the available Ring Profiles and click one to activate it. The currently active Ring Profile synchronises across all your devices, and you may activate any Ring Profile from any device.



Ring Profiles - good to know

- Ring profiles are not designed to allow the routing of calls to other destinations – use Call Divert for that purpose or speak to your support team.
- Ring profiles are not visible to other users on your system, so you can't use them to indicate to others if you are away from your desk or in a meeting – use the DND, Away or Offline presence states for that purpose.
- Ring profiles are not time-based, once active a Ring Profile will remain active until you activate another ring profile.
- A device may be a member of more than one Ring Profile.
- Ring Profile names can be a maximum of 18 characters in length.
- You may create a maximum of five Ring Profiles plus the Default Ring Profile.
- If an active Ring Profile is deleted, the Default Ring Profile automatically becomes active.
- If a Device is deleted from your Universal subscription, it is automatically deleted from all Ring Profiles it was a member of. If it was the only member of a Ring Profile, the Ring Profile will also be deleted.

- If a new device is added to your Universal subscription, it is automatically added to the Default Ring Profile.
- You may activate, edit or delete any Ring Profile from any of your Evonex Connect devices.

Number Presentation

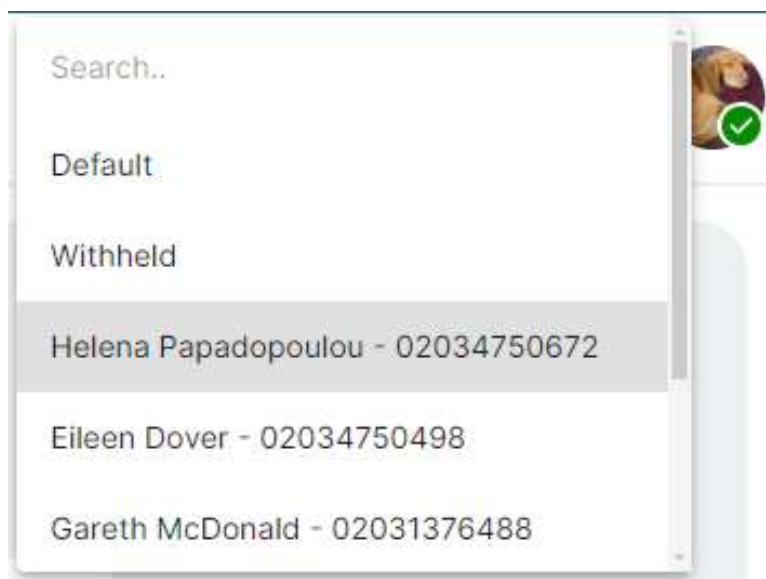
By default, the number that is presented as your outbound caller ID when you make an external call is 'Your Telephone Number' displayed in the top-right-hand corner of the screen.



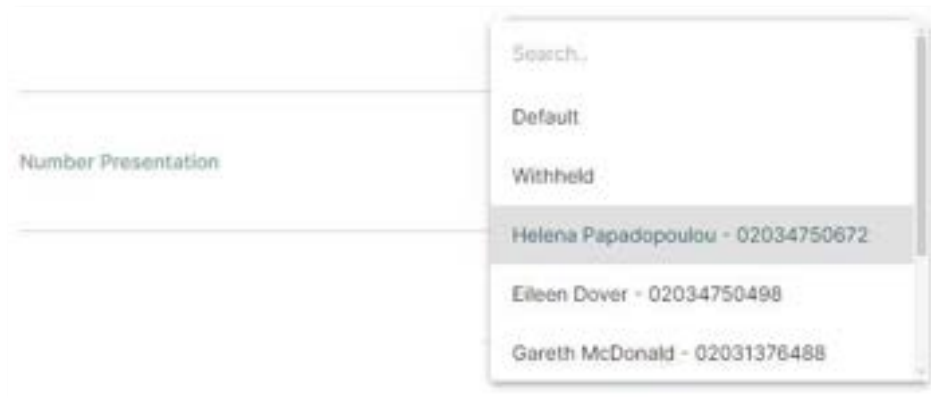
That is unless your administrator has specified another number for you to present. If so, you will see 'Caller ID:' in place of your DDI or extension number. Your administrator may allow you to present other numbers too – this is called dynamic number presentation. When you change your presentation number on one of your Evonex Connect clients, this will synchronise to your other clients automatically. To change the outbound caller ID dynamically click the drop-down arrow.....



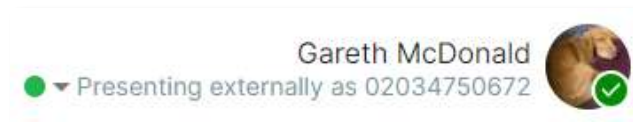
.....and select a number to present from the list.



You may also use the corresponding 'Number Presentation' drop-down list under 'Profile'.



'Caller ID:' will be displayed instead of your telephone number until you select another presentation number or click 'Default' which disables dynamic number presentation.



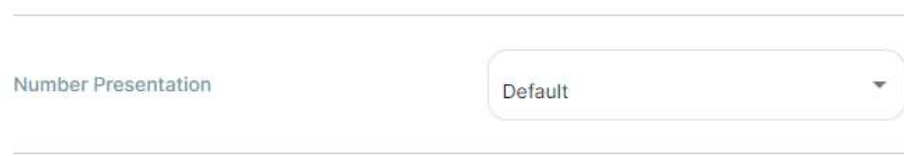
You may also select 'Withheld' to ensure calls are made not presenting any caller ID.



Your administrator may remove your ability to present any numbers other than one they specify; this will then be your default. In this case, there will not be a drop-down arrow and 'Caller ID:' will be permanently shown.



In the Number Presentation section of the Profile menu, 'Default' will be the only available option.



You can always discover your own number by going to ['Profile > My Number'](#)

Companion Mode

What is Companion Mode?

Also known as 'CTI Control', Companion Mode allows you to control one of your desk phones from your desktop Evonex Connect device (browser, Windows app or macOS app). When Companion Mode is enabled, the softphone element of Evonex Connect is disabled. Your desk phone will perform the actions you initiate via Evonex Connect and Evonex Connect will mirror the actions performed on your desk phone.

Question: "Why would I use Companion Mode?"

Answer: "Because you'd prefer your calls were handled through your desk phone rather than your Evonex Connect Softphone."

Here's a couple of examples:

1. Alice wants to make a phone call to her colleague Bob. She has a desk phone, and she has Evonex Connect in her browser on her computer. She doesn't have a headset connected to her computer, so Evonex Connect in Softphone mode is not suitable for her. Therefore, she needs to use Companion Mode to control her desk phone.

After she has enabled Companion Mode, she uses the 'Contacts' menu to search for 'Bob' and find his number. When she clicks the 'Call' button the call is made through her desk phone. Evonex Connect reflects the progress of the call and she's able to perform call control actions such as cancel the call before Bob answers, hold the call after he answers or end the call when the conversation is finished, all with buttons on Evonex Connect.

2. Charlie has a headset connected to his desk phone and wishes to use these to receive calls in to one of several hunt groups that he's a member of. He's recently installed the Evonex Connect desktop app for Windows on to his computer and wishes to use the functionality it brings to see the caller's number plus the hunt group they're calling in to. He'd also like to use the CRM integration feature to see the details of matched contacts in his CRM as the calls come in.

Charlie enables Companion Mode and continues with his work. When the next call arrives, he sees the Evonex Connect 'toast popup' in the bottom right corner of his screen. He clicks the popup which brings Evonex Connect to the foreground. He's immediately able to see the caller's number and that the call is coming in to the 'Sales' number. He can also see a matched contact found in his CRM indicating the caller's name is 'Diane Enfield'.

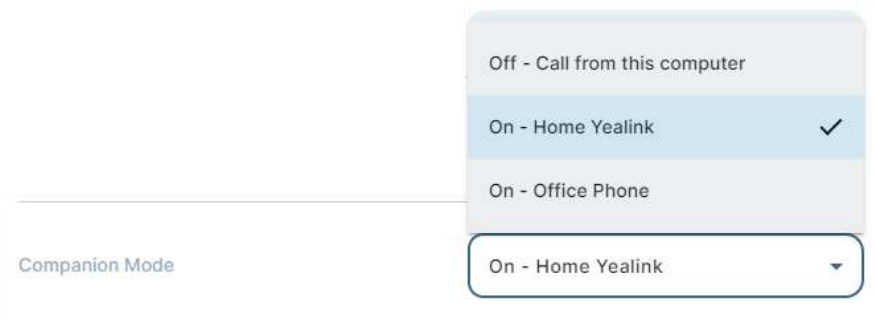
Charlie clicks the 'Answer and pop' button in Evonex Connect. The call is answered on his desk phone and Charlie can greet Diane. Her contact page in Charlie's CRM is also popped. Charlie needs to hold the call to speak to his colleague at the next desk. He uses the 'Hold' button in Evonex Connect which puts the call from Diane on hold on his desk phone. He uses the same button to return to the call.

Please note, in the initial release, to perform advanced functions such as to transfer or park the call, Alice and Charlie can use the buttons on their desk phones. These actions are reflected in Evonex Connect, but interaction with the buttons that would otherwise control these functions may be limited.

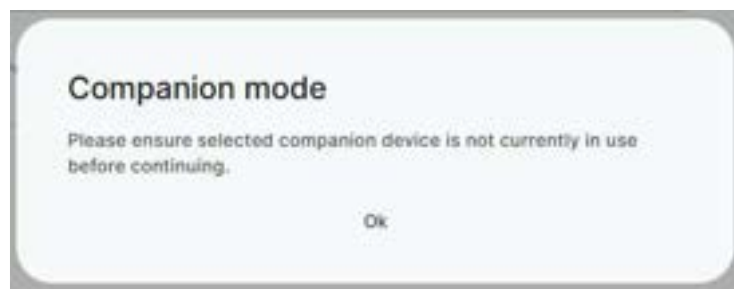
How do I enable and disable Companion Mode?

Companion Mode can be enabled or disabled from the 'Profile' menu. Select your desk phone from the 'Companion Mode' drop-down list to turn Companion Mode on. The name of the desk phone device will be prefixed with the word On, for example 'On – Office Phone' as in the below example.

If you have more than one desk phone, both will be listed, and you may select the one you wish to control. You cannot control both desk phones concurrently. To disable Companion Mode and return your Evonex Connect device to Softphone Mode, select 'Off – Call from this computer'.



Please ensure that you're not in a call on either the Evonex Connect or Companion device when enabling Companion Mode, as this may cause the call to end unexpectedly. Click 'OK' to confirm.



When Companion Mode is enabled, an extra button in the shape of a desk telephone is shown in the top right-hand corner of Evonex Connect to the left of your Profile picture. This serves two purposes – it's a visual reminder that Companion Mode is enabled, and you can also click the button to return to the Profile menu to disable Companion Mode.



The registration indicator should be a green circle, as in the image on the left above. This indicates the selected Companion device is registered and ready to take calls. If a red circle as shown, as in the image below, the selected Companion device is not registered, and you will be unable to make or receive calls. For details of how to make and receive calls with Companion Mode, please see the ['Call Handling'](#) section of this guide.

*Companion Mode - helpful to know:**Compatible handsets*

Manufacturer	Model
Cisco	CP6841
Cisco	CP6851
Cisco	CP6871
Cisco	CP7811
Cisco	CP7821
Cisco	CP7832
Cisco	CP7841
Cisco	CP7861
Cisco	CP8811
Cisco	CP8832
Cisco	CP8841
Cisco	CP8845
Cisco	CP8851
Cisco	CP8861
Cisco	CP8865

Manufacturer	Model
Yealink	T30P
Yealink	T31G
Yealink	T31P
Yealink	T31W
Yealink	T33G
Yealink	T33P
Yealink	T34W
Yealink	T40P
Yealink	T40G
Yealink	T41P
Yealink	T41S
Yealink	T42G
Yealink	T42S
Yealink	T42U
Yealink	T43U
Yealink	T44U
Yealink	T44W
Yealink	T46G
Yealink	T46S
Yealink	T46U
Yealink	T48G
Yealink	T48S
Yealink	T49G
Yealink	T53
Yealink	T53W
Yealink	T54S
Yealink	T54W
Yealink	T57W
Yealink	T58
Yealink	T58W
Yealink	VP59
Yealink	AX83H
Yealink	AX86R

Limited functionality for the first release

The following matrix illustrates the functions that will be available when the Companion Mode feature is initially released, and the ones that are yet to come. We have designed the feature so that we can dynamically enable individual functions as and when they become available. This means that your Companion Mode functionality will improve over time. This matrix will be periodically updated to reflect currently supported functions.

Call control function	Direction of call	Supported in current version?
Make a call	Outbound	Yes
End a call	Outbound	Yes
Cancel a ringing call	Outbound	Yes
Hold a call	Outbound	Yes
Unhold a call	Outbound	Yes
Toggle two active calls	Outbound	No
Blind transfer a call	Outbound	No
Attended transfer a call	Outbound	No
Park a call	Outbound	No
Unpark a call	Outbound	No
Mute a call	Outbound	No
Send DTMF during a call	Outbound	No
Conference a third party into a call	Outbound	No
Answer a call	Inbound	Yes
End a call	Inbound	Yes
Decline a ringing call	Inbound	Yes
Hold a call	Inbound	Yes
Unhold a call	Inbound	Yes
Toggle two active calls	Inbound	No
Blind transfer a call	Inbound	No
Attended transfer a call	Inbound	No
Park a call	Inbound	No
Unpark a call	Inbound	No
Mute a call	Inbound	No
Send DTMF during a call	Inbound	No
Conference a third party into a call	Inbound	No

Companion Mode and Voicemail

When Companion Mode is enabled, if you listen to a Voicemail message in Evonex Connect, the audio of the message is played back through your computer's audio device, not through your Companion desk phone.

To avoid this, please press the Envelope button on your desk phone or dial 8400 to listen to your Voicemail messages through the desk phone.

Companion Mode with CRM integration & Click-to-dial

In Companion Mode, the Evonex Connect CRM integration & click-to-dial features are fully supported and there is parity with functionality when Evonex Connect is in softphone mode.

Companion Mode and Ring Profiles

As previously discussed, Companion Mode disables the softphone element of your Evonex Connect desktop device and enables the ability for you to control the calls of your desk phone (the Companion device).

In version 1.6.0, the colour of the bell shown on the Ring Profile button relates only to the Evonex Connect device, even if it is in Companion Mode (and therefore controlling the calls of your desk phone device). If the bell is green, that does not necessarily indicate that the Companion desk phone device is in the active Ring Profile. Similarly, if it is red, that does not necessarily indicate that the Companion desk phone device is not in the active Ring Profile.

In short, the active Ring Profile always only affects the Evonex Connect softphone device, even if it is in Companion Mode and controlling your desk phone's calls. Therefore, the colour of the bell shown on the Ring Profile button only indicates whether the Evonex Connect device is in the active Ring Profile or not, and therefore would ring, were it not in Companion Mode.

This is intended behaviour in version 1.6.0 of Evonex Connect. Therefore, when in Companion Mode, you should check that the selected Ring Profile includes the Companion device, otherwise you may not receive calls. Please see the [Ring Profiles](#) section for more details.

Companion Mode default

If you enable Companion Mode, it will remain enabled until you disable it or log out. Evonex Connect will return to the default of softphone enabled (Companion Mode disabled) when logging back on.

Companion will remain enabled if you close your browser or Evonex Connect desktop app without logging off first, as long as your authentication token and browser cookies are still valid when you next open your browser or Evonex Connect desktop app.

Controlling multiple Companion devices from multiple Evonex Connect devices

As a Universal Licence holder, you may own up to two desk phone devices. Evonex Connect can be configured to control either one of your devices by simply selecting the one you wish to control (the Companion) from the drop-down list in the Profile menu.

If you also have two Evonex Connect desktop instances, either on browser or the Evonex Connect desktop app, you may configure each one to control (be the Companion to) each desk phone.

It is also possible for multiple Evonex Connect desktop (browser or app) instances to control a single desk phone concurrently – simply select the same desk phone from the drop-down list on each Evonex Connect instance. In this scenario you will be able to control the calls of your desk phone Companion from either Evonex Connect instance and the actions you take, and functions you initiate, on one device are mirrored on the others.

Caller ID presentation when in Companion Mode

When in Companion Mode, the telephone number you present to those you call will be that of your 'Default presentation number'. This is usually your own telephone number but may be a different number that your administrator has configured for you.

In version 1.6.0. the Evonex Connect will not reflect the number that is being presented when Companion Mode is enabled. Indeed, it is not possible to use Evonex Connect to select a different caller ID to present when Companion Mode is enabled.

Known issues with Companion Mode in version 1.6.0

1. If the caller is Evonex Connect softphone and the callee is a desk phone as a Companion to Evonex Connect, and the caller attempts to hold or park an internal or on-net call, the call is not held or parked, and two-way speech is maintained.

Scenario:

- Alice has Evonex Connect in softphone mode. Bob has Evonex Connect in Companion mode with his desk phone.
- Alice calls Bob and he answers using Evonex Connect.
- Alice attempts to hold or park the call – the 'Hold' and 'Park' buttons will briefly turn grey when clicked then back to normal colour, but the call is not held or parked.
- Alice should be aware of this specific scenario and look out for the buttons not changing colour correctly when clicked, which indicates unsuccessful completion of the action.
- *Please note, this only affects internal or on-net calls where the callee answers using Evonex Connect and the caller attempts to hold or park the call. If the callee attempts to hold or park it, or the call is an external one (the more common scenarios), the function will be completed successfully.*

2. If the caller is a desk phone and the callee is a desk phone as a Companion to Evonex Connect, and the caller attempts to hold an internal or on-net call, the call is held but when un-held there is one-way audio, and the call will drop soon after.

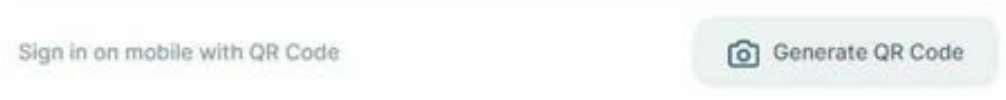
Scenario:

- Alice has a desk phone. Bob has a desk phone as a Companion to Evonex Connect.
- Alice calls Bob and he answers using Evonex Connect.
- Alice attempts to hold the call which is successful.
- When Alice un-holds the call, there is one-way audio (Alice cannot hear Bob, but Bob can hear Alice) and the call will drop within a few seconds.
- Alice should be aware of this specific scenario and not attempt to hold outgoing internal or on-net calls.
- *Please note, this only affects internal or on-net calls where the caller is a desk phone, and they attempt to hold or park the call. If the callee attempts to hold or park it (more common scenario), the function will be completed successfully.*

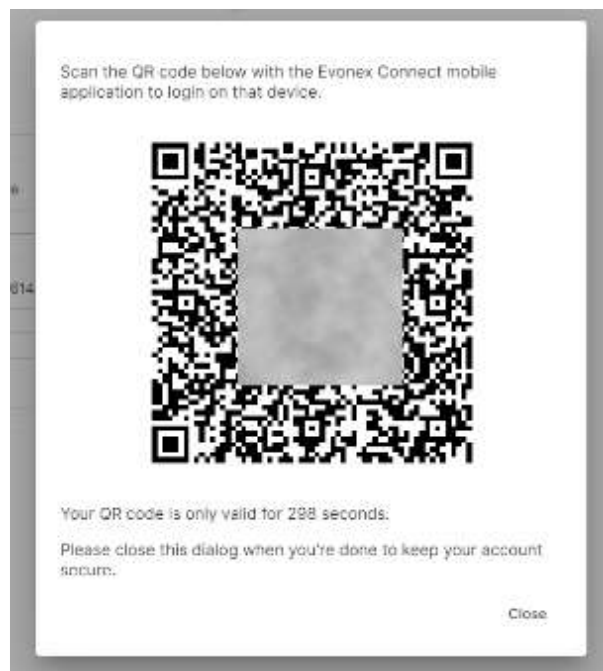
Sign in on mobile with QR Code

Your Evonex credentials are used to sign in on all device types. However, to facilitate signing in on mobile, without having to re-type your username and password, it is possible to generate a QR code in Evonex Connect for Web Browser, Windows or macOS. You can then scan the QR code with the iOS or Android mobile app to sign in.

When you have logged in on your desktop Evonex Connect device, click on 'Profile' from the menu and locate the 'Sign in on mobile with QR Code' field.

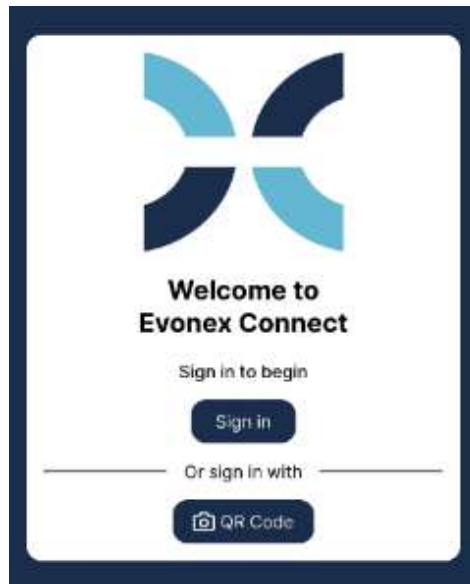


Click the 'Generate QR Code' button and a screen similar to the one below will be displayed:



Open the Evonex Connect app on your mobile device. If you have not yet installed the mobile app, please see the previous section for details on [how to download the app for iOS](#) or [how to download the app for Android](#).

At the 'Sign in' screen, tap the 'QR Code' button.

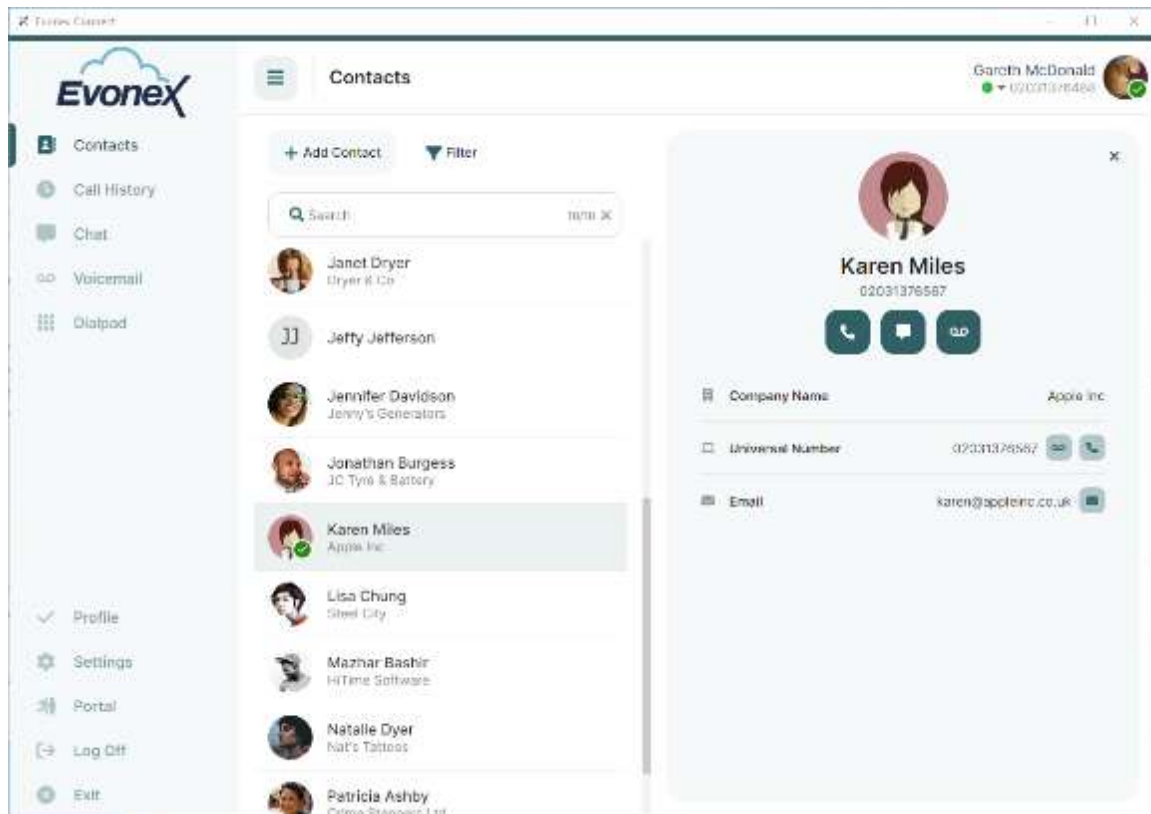


Align the QR on your desktop screen within the square shown on your mobile screen. Your sign in will be authenticated.

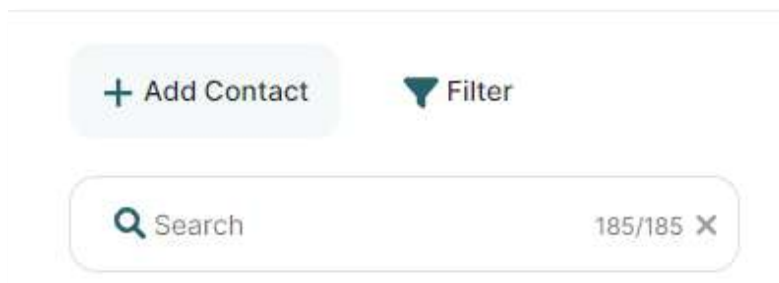


Contacts

The Contacts section allows you find people you wish to call. It includes entries from the internal 'Directory', your 'Personal' address book, the 'Shared' address book, and any CRM providers your admin has set up for you. Entries in the internal 'Directory' will also include a presence badge.



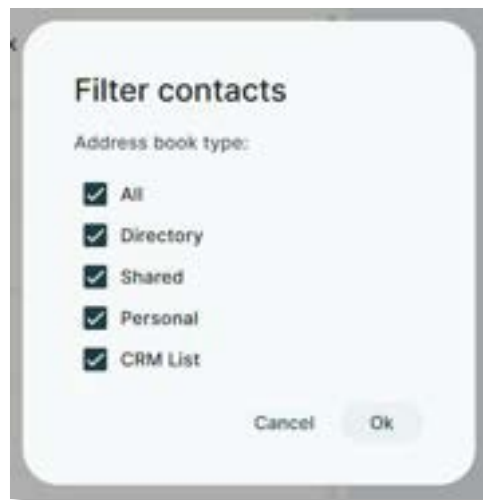
You may use the Search function to find the contact you wish to dial. The Search field supports alphanumeric characters, and you can therefore search for names, numbers, departments, companies, email addresses, etc. You can use the filter option to include or exclude the Address books your search is performed within, to return fewer or greater results.



You can use the filter option to include or exclude the Address Books your search is performed within, to return fewer or greater results. The available Address Books are:

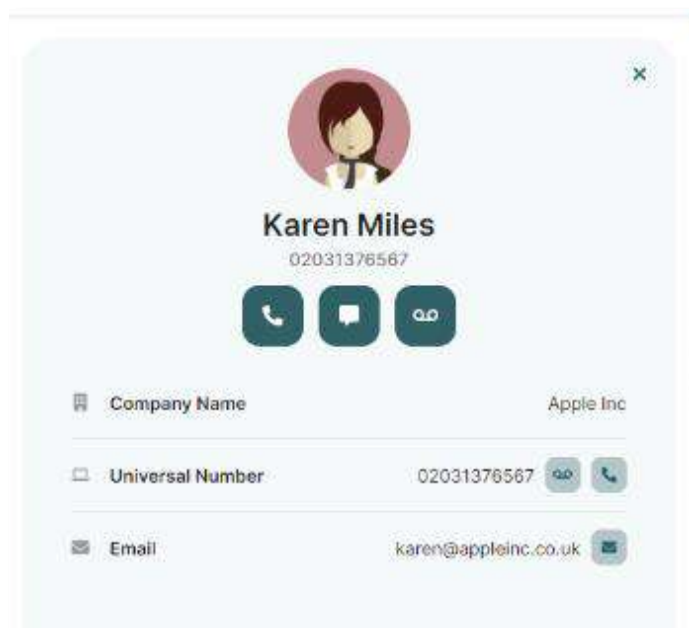
- 'Directory' which is the internal list of all users on the same account as you, including a presence badge.
- 'Shared' which is the global address book managed by your administrator.
- 'Personal' which is contacts added by you and only available to you.
- 'CRM List' which is contacts that are stored in any configured CRM systems (please see the [CRM Integration section](#) for more details)

Selecting 'All' will show contacts from all directories.



Once you've found the contact you wish to dial, select it and the detail of the contact will be displayed in the Detail pane. If the contact you have selected is from the internal Directory, you'll have the option of clicking the 'Dial', 'Chat' and 'Voicemail' buttons just below the Username and number.

If the contact you have selected is from the Personal, Shared or CRM Address books, you'll only have the option to 'Dial' the contact. If there is more than one telephone number associated with the contact, there will be individual 'Call' and 'Voicemail' buttons against each number.





Click the button to call the contact's primary number.



Click the button to start a chat with this user.



Click the button to leave a voicemail message for this user's primary number without ringing their phone first.



Click the button to call one of this user's secondary numbers.



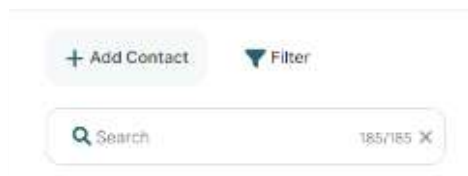
Click the button to leave a voicemail message for one this user's secondary numbers without ringing their phone first.



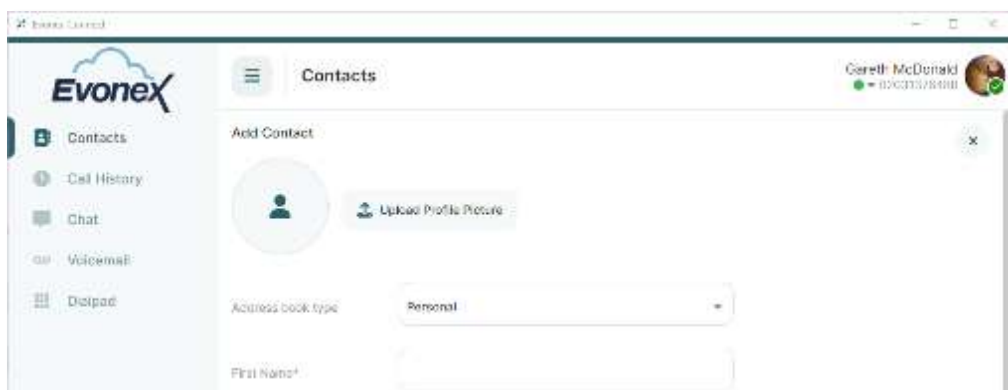
Click the button to send an email to this user's email address via your default email app.

Add a Personal contact

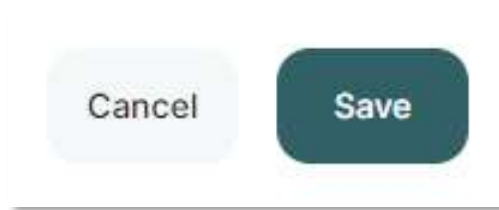
To add a new Personal contact, click the 'Add Contact' button at the top of the Contacts pane.



You must enter the contact's first and last names and a telephone number as a minimum. You may also add other details such as company name, job title, department and email. You may also upload a profile Avatar picture for each contact.

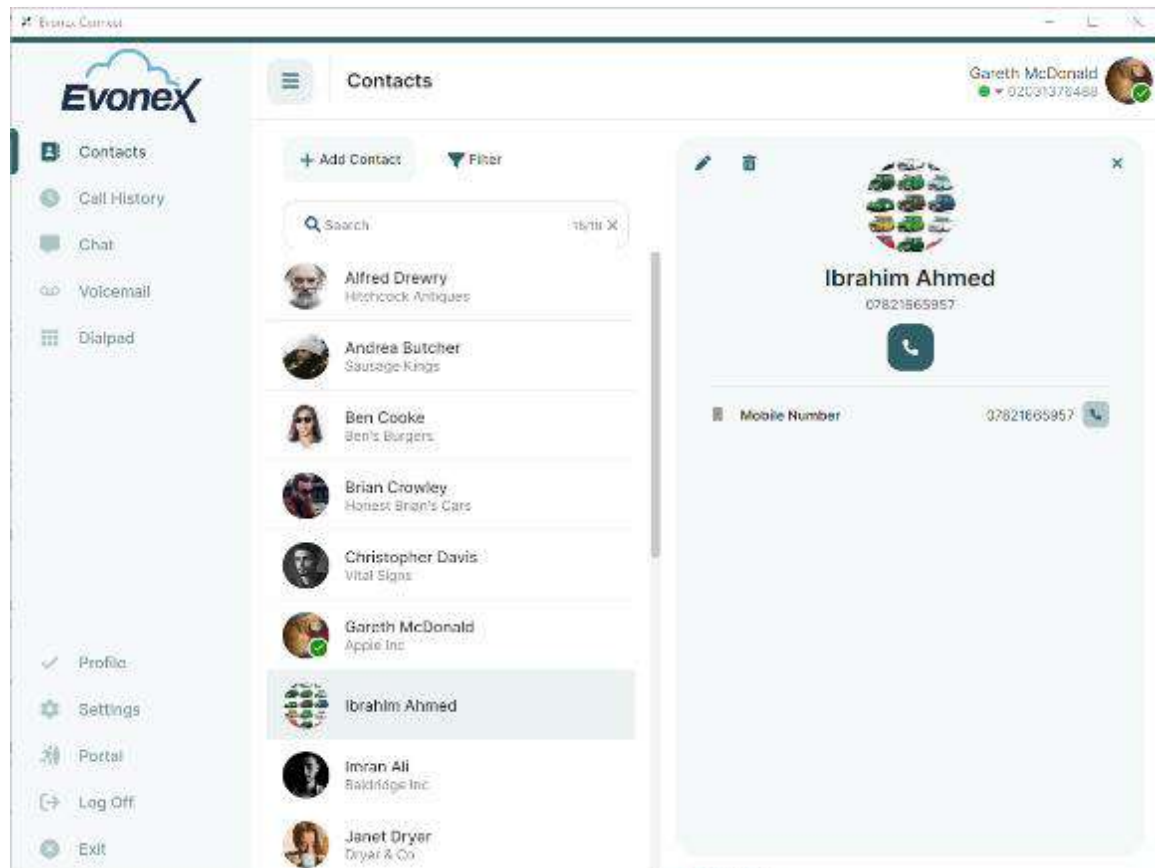


When you have populated the form with all the required details, click the 'Save' button at the bottom of the screen.



Edit a Personal contact

To Edit or Delete a contact, click the  Edit or  Delete buttons, at the top of the Contact detail pane, accordingly. If these buttons aren't available, you are trying to edit or delete a Shared contact - please contact your support team.



Make the required changes to the form.

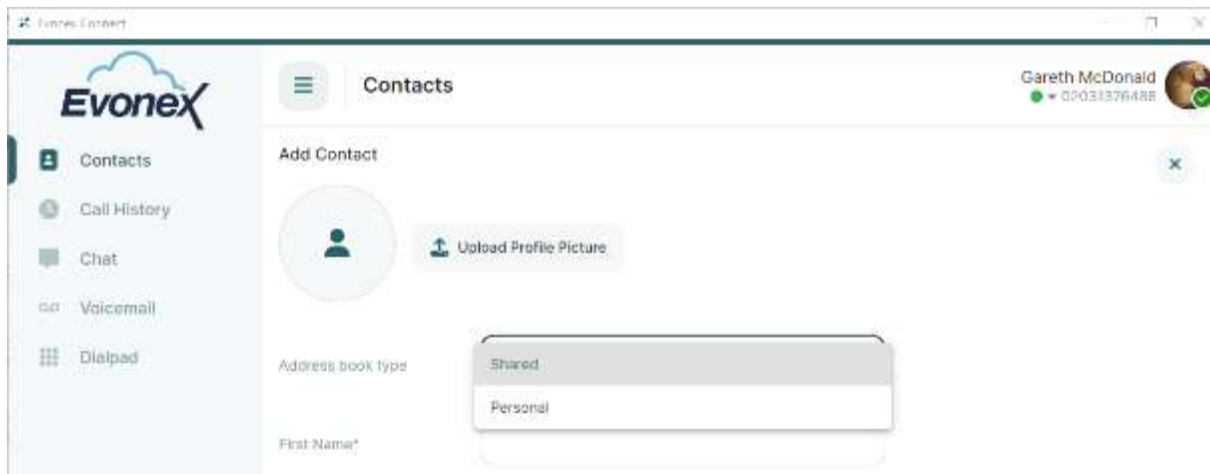
When you have made the required changes, click the 'Save' button at the bottom of the screen.

Add a Shared contact

Only an administrator can add Shared Address Book entries, through Evonex Connect or via the Portal. If you do not have administrator privileges, please contact your support team.

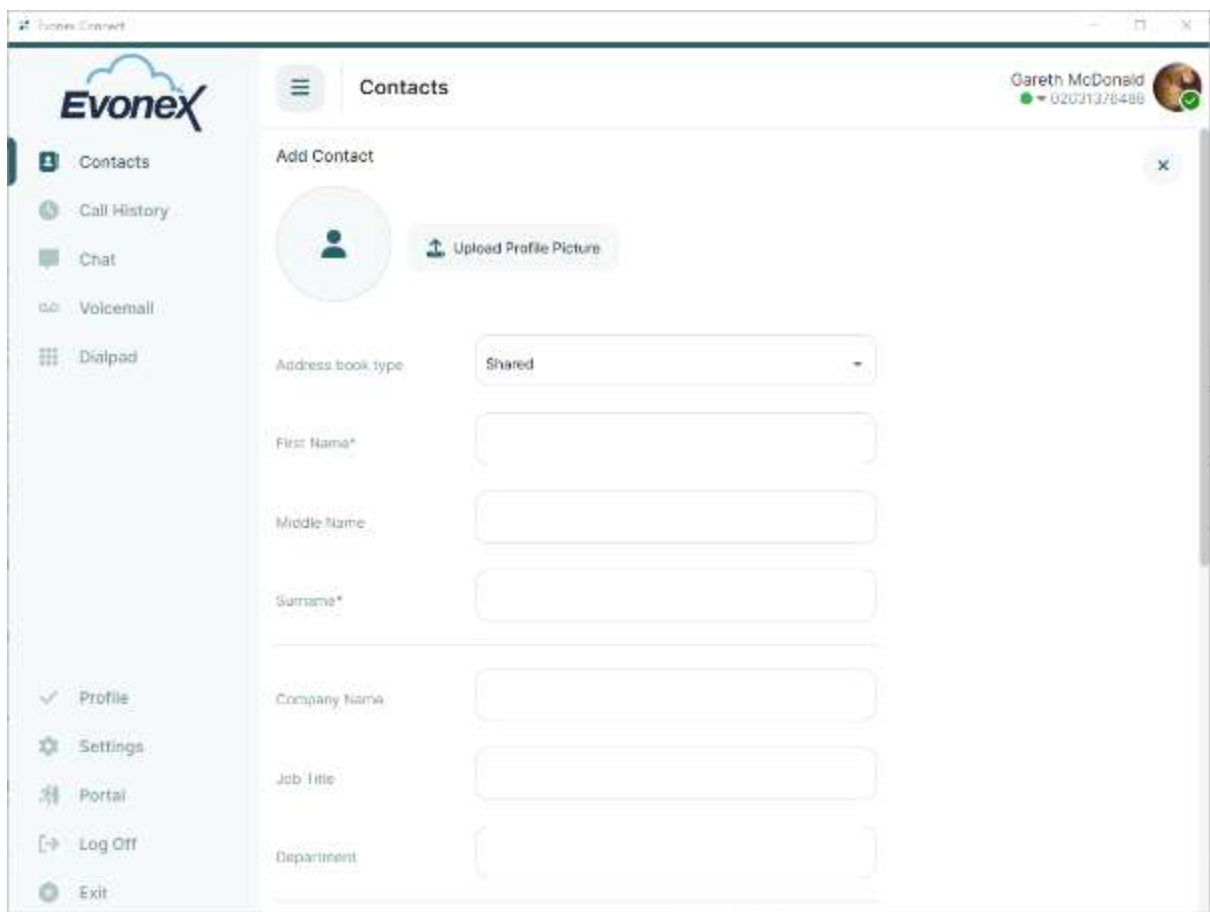
To add a new Shared contact, click the 'Add Contact' button at the top of the Contacts pane.

Select 'Shared' from the 'Address book type' drop down list.



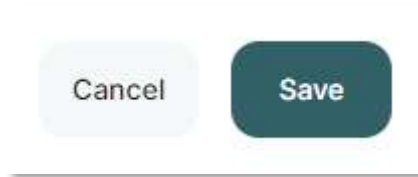
The screenshot shows the 'Evonex Connect' interface. On the left is a sidebar with navigation links: Contacts, Call History, Chat, Voicemail, and Dialpad. The main header shows the 'Contacts' tab and a user profile for Gareth McDonald. The 'Add Contact' form is displayed, featuring a profile picture placeholder with an 'Upload Profile Picture' button. The 'Address book type' dropdown menu is open, showing two options: 'Shared' (highlighted) and 'Personal'. Below the dropdown is a 'First Name*' input field.

You must enter the contact's first and last names and a telephone number as a minimum. You may also add other details such as company name, job title, department and email. You may also upload a profile Avatar picture for each contact.



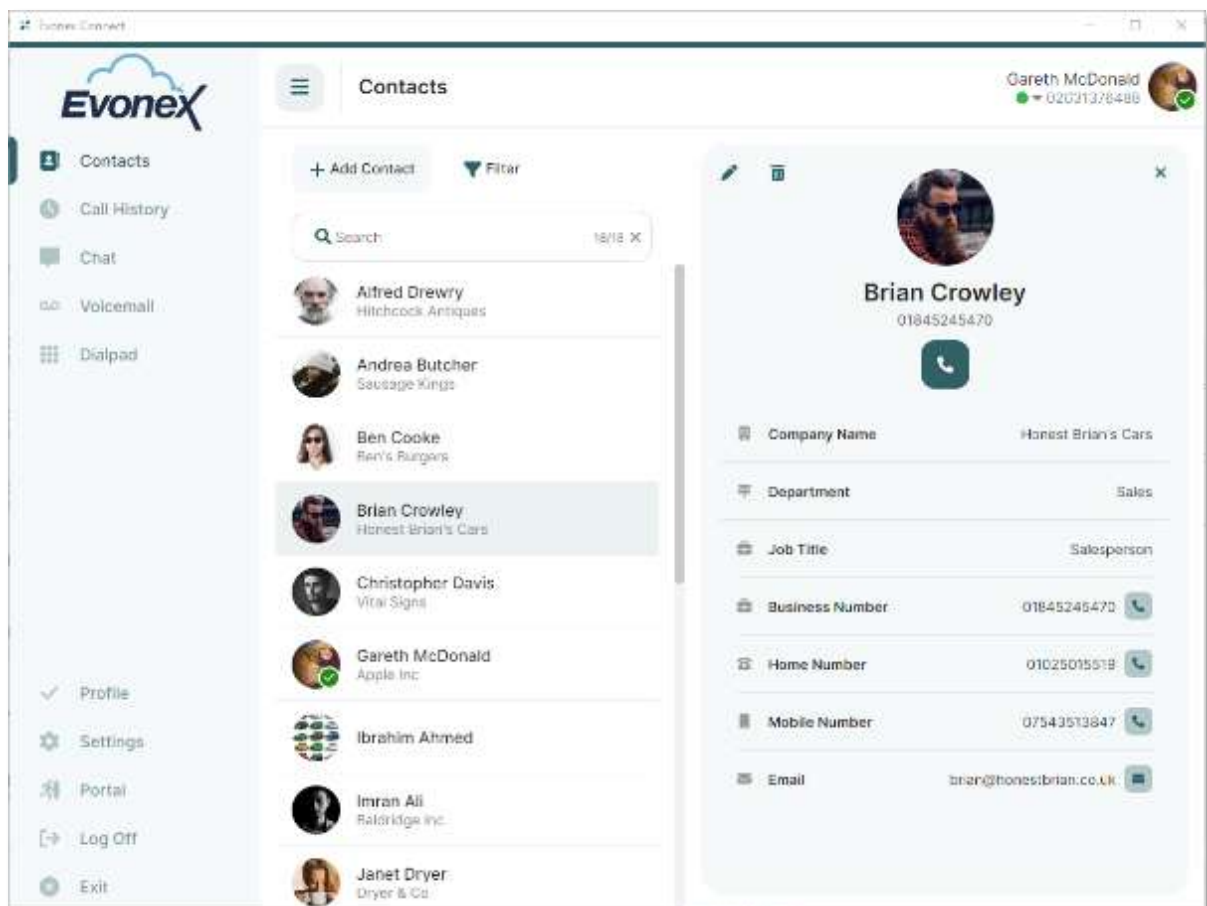
This screenshot shows the 'Add Contact' form with the following fields filled out: 'Address book type' is set to 'Shared'; 'First Name*' is 'Gareth'; 'Middle Name' is 'James'; 'Surname*' is 'McDonald'; 'Company Name' is 'Evonex'; 'Job Title' is 'Sales'; and 'Department' is 'Sales'. The 'First Name*' and 'Surname*' fields are marked with an asterisk, indicating they are required. The sidebar on the left includes additional links: Profile, Settings, Portal, Log Off, and Exit.

When you have populated the form with all the required details, click the 'Save' button at the bottom of the screen.

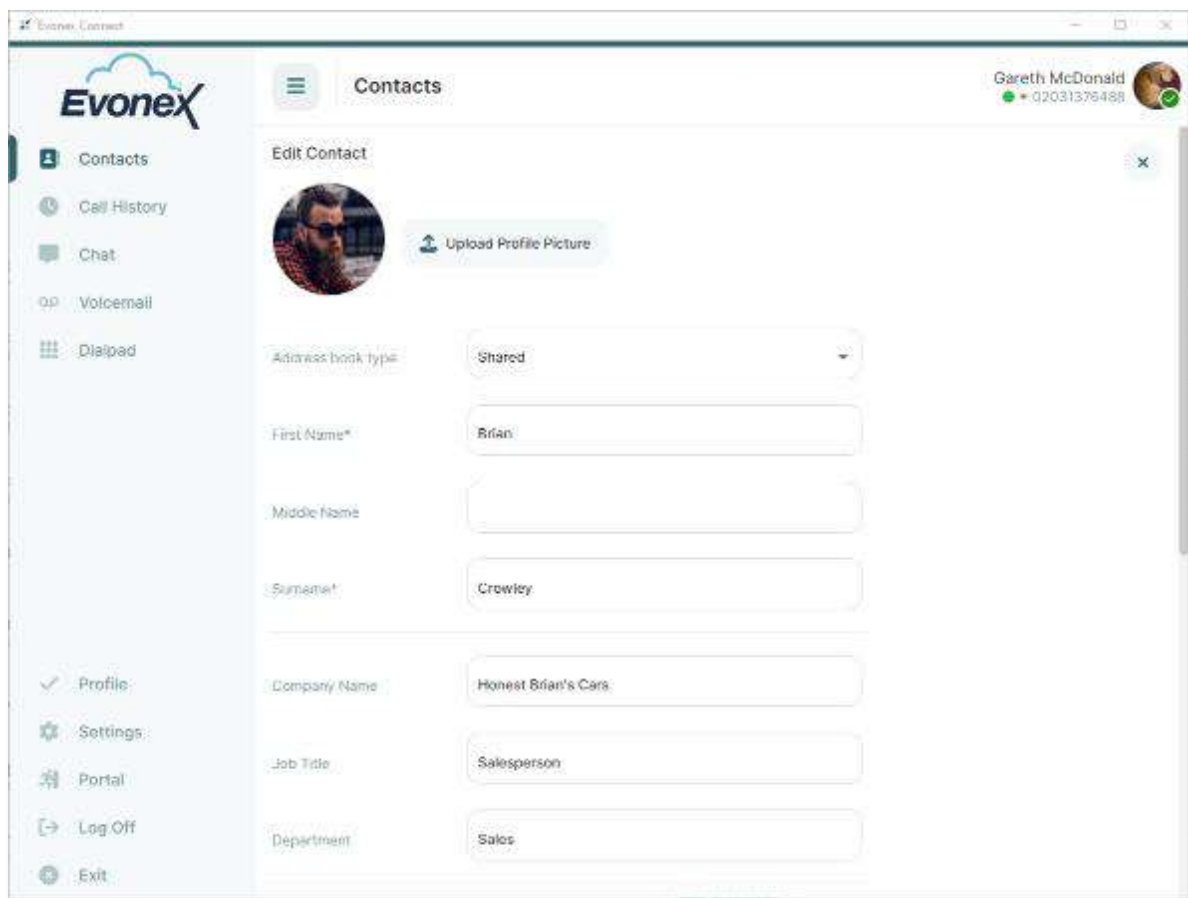


Edit a Shared contact

To Edit or Delete a contact, click the  Edit or  Delete buttons, at the top of the Contact detail pane, accordingly. If these buttons aren't available, you do not have permission to edit or delete a Shared contact - please contact your support team.

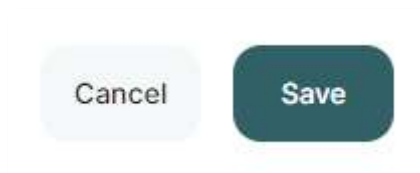


Make the required changes to the form.



The screenshot shows the 'Evonex Connect' application interface. On the left is a sidebar with navigation options: Contacts, Call History, Chat, Voicemail, and Dialed. Below these are links for Profile, Settings, Portal, Log Off, and Exit. The main area is titled 'Contacts' and shows an 'Edit Contact' form. At the top right of the main area, the user's name 'Gareth McDonald' and a status indicator are visible. The form includes a profile picture upload section with a circular image of a man and an 'Upload Profile Picture' button. Below this are several input fields: 'Address book type' (a dropdown menu set to 'Shared'), 'First Name*' (containing 'Brian'), 'Middle Name' (empty), 'Surname*' (containing 'Crowley'), 'Company Name' (containing 'Honest Brian's Cars'), 'Job Title' (containing 'Salesperson'), and 'Department' (containing 'Sales').

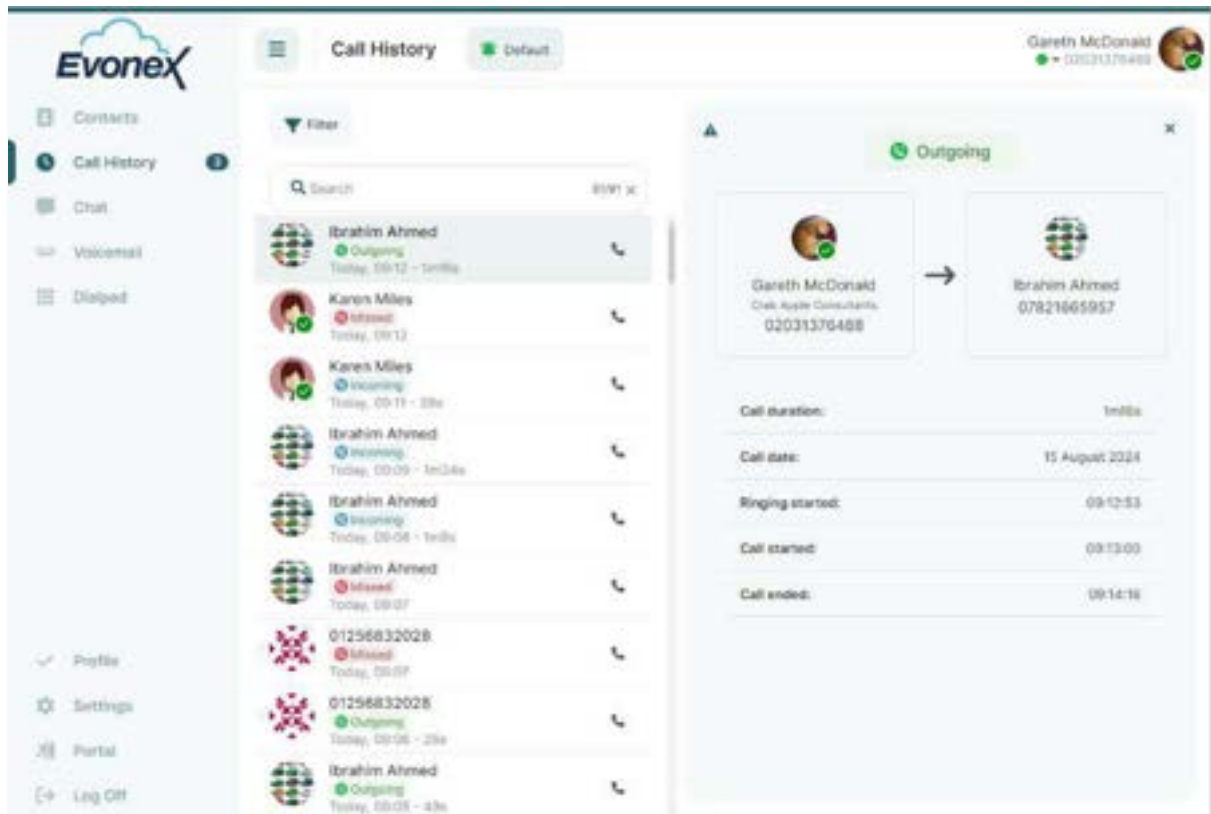
When you have made the required changes, tap the 'Save' button at the bottom of the screen.



This image shows a close-up of the bottom of the screen, featuring two buttons: a light blue 'Cancel' button and a dark green 'Save' button.

Call History

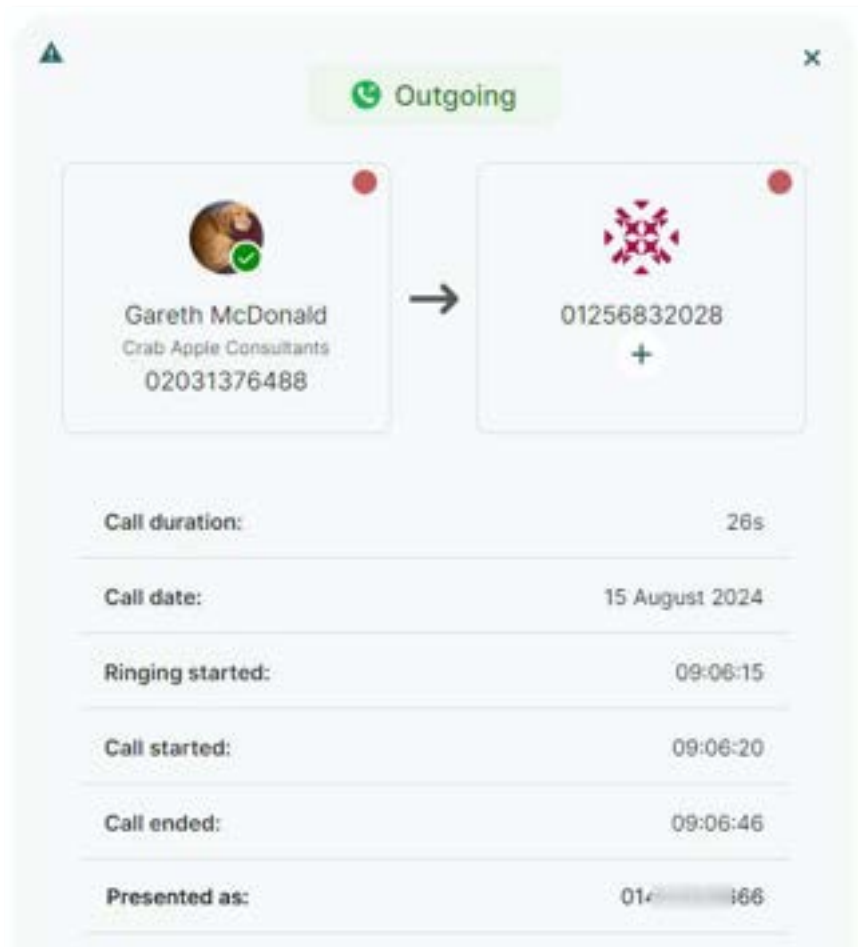
Call History shows a list in the Context pane of your last 300 incoming, outgoing and missed calls. Once 300 entries have been reached, new entries will overwrite the oldest ones.



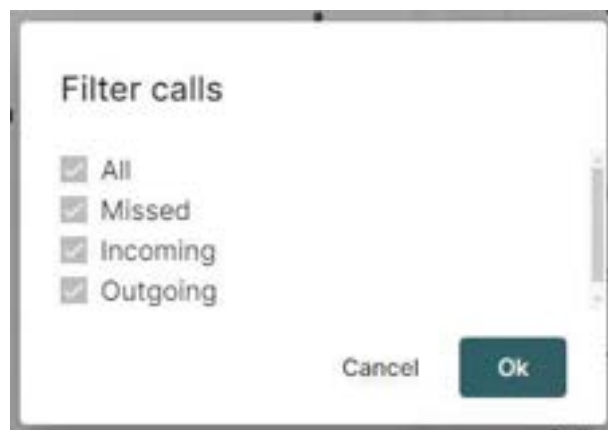
Each entry in the list contains a tag to indicate the direction of that call. To call the number, click the telephone handset button located next to each entry in the Context Pane.



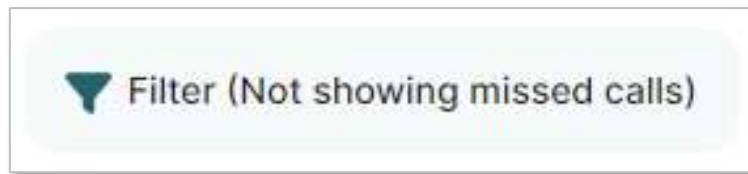
Selecting a History entry in the Context Pane will display further details of the entry in the Details Pane. This view also includes a similar call direction tag. You'll see the duration, time, date, etc. If a Call History entry is not matched to an address book entry, a '+' button will be shown below the number. Click the plus button to [add a new address book entry](#).



At the top of the list, there are also a Filter button and a Search function. Clicking the filter button reveals check boxes to allow you to select or deselect different call types to view in the list and therefore include or exclude them in the displayed results. You may select more than one check box concurrently.



If you do not select the Missed checkbox, the Filter button will warn you accordingly.



Search allows you to enter alphanumeric text to further narrow-down the results, which are displayed in descending chronological order. You may search by contact, company or department name or telephone number.



If you receive a missed call, a notification badge will be located next to the Call history option in the Menu Pane. Click it to be taken to the Context Pane. If necessary, use the Filter button to view only your missed calls. Your latest missed call will be at the top of the list. Once you have viewed the new missed calls the notification badge will disappear.



Call Recording Playback

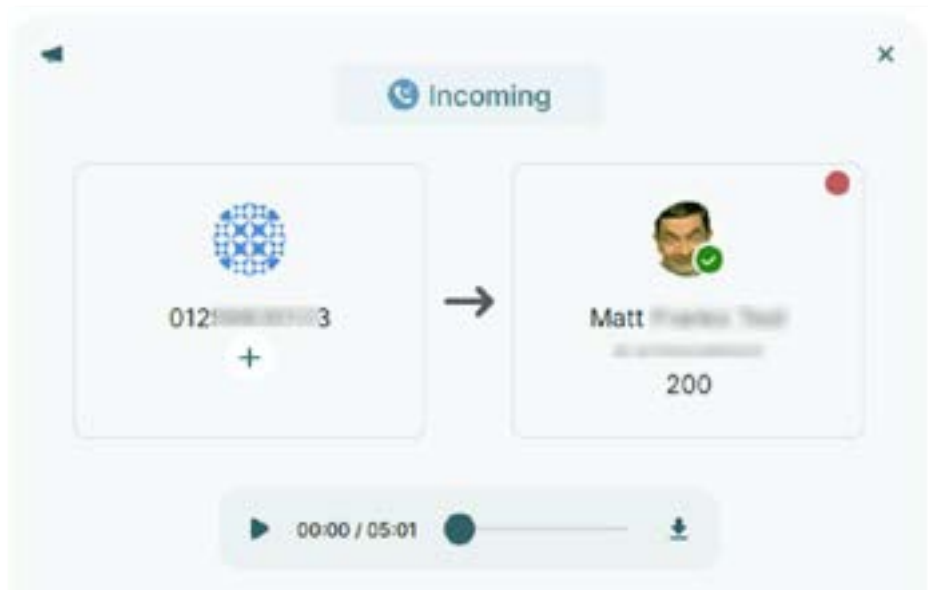
If a call was recorded, and you have permissions to do so, you can playback and download the recordings of calls you have made and received, directly from the call history detail pane. You can access recordings for all outgoing calls you make and the individual legs of incoming calls that you're involved in.

For example, if you answer in incoming call a call to a huntgroup, have a conversation with the caller for 3 minutes, then transfer the call to a colleague, you will only be able to play back or download the 3-minute part of the call that you were involved in. You will not be able to playback or download the part of the call after you transferred it to your colleague.

Please contact your administrator or your support team to have your permissions modified to allow you to access your call recordings in Evonex Connect. Please note that administrators can play back and download all parts of all calls via the Evonex Portal.

Call recording indicators

When you view the call history detail pane, and the call was recorded, you will see one of three types of recording indicator (red circle) in the top-right corner of either the source or destination box.



Recording indicator types:

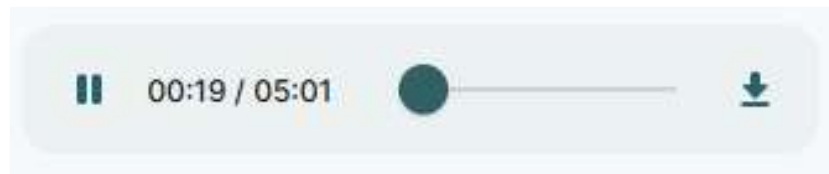
Indicator	Description
	Recording is available and ready to play or download. A playback scrub bar will also be shown.
	Recording is processing. Please try again in 30 seconds. Alternatively, this could also mean that the call length was too short (less than 3 seconds) and the recording could not be processed.
	Recording has been deleted and can no-longer be played or downloaded.
No indicator	The call was not recorded

Playing and downloading

Below this you'll see a playback scrub bar. Click the play button to start the playback. The recording will start to download in readiness for playback, and the button will change to an activity spinner.



When the download has finished, the recording will begin to play automatically, and the spinner will change to a pause button.



Drag the scrub bar to any part of the recording to play from that point.



To permanently download the recording as an MP3 file, click the download button. The file will be saved to your default downloads folder.

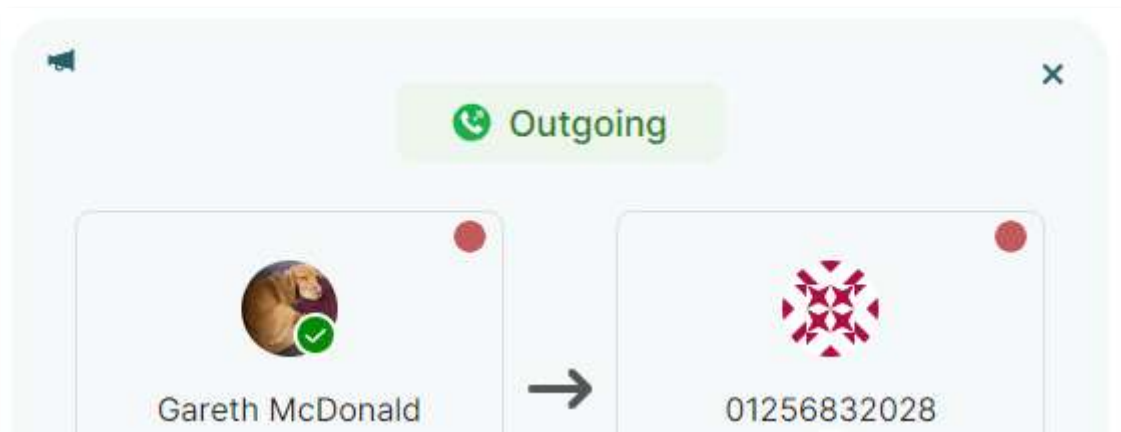


Call Feedback

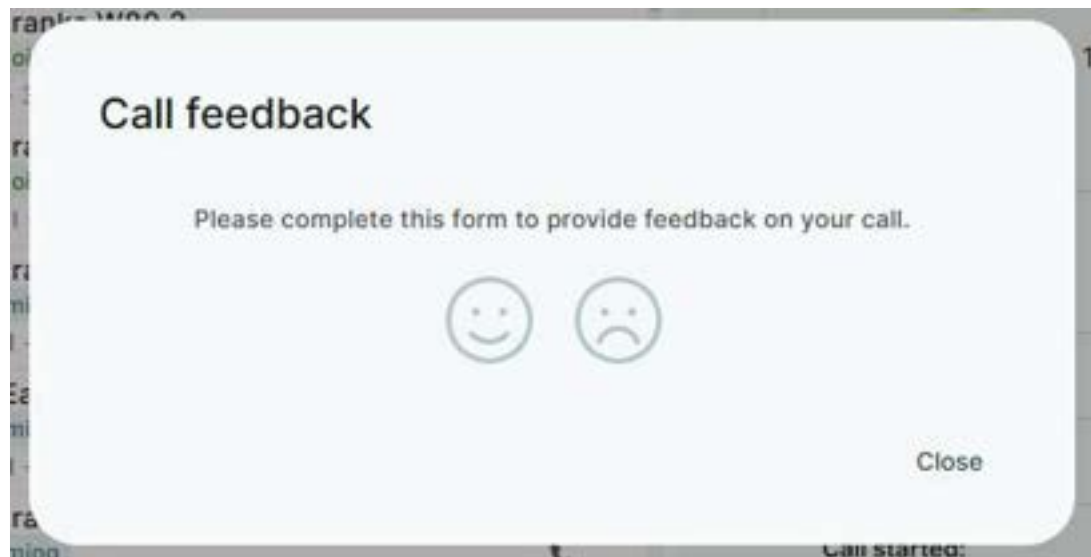
From time to time, it may be necessary to send feedback to the Evonex Team regarding a historic call. This could be because you experienced a problem with the call which requires investigation. The information sent to the Team is enough for us to identify the call in our logging and diagnostic tools, such as date, time, telephone numbers, usernames, etc, but no other personal data is sent.

To provide feedback for a call, firstly locate it call in your call history. Select it and the detail pane will show the details of the call.

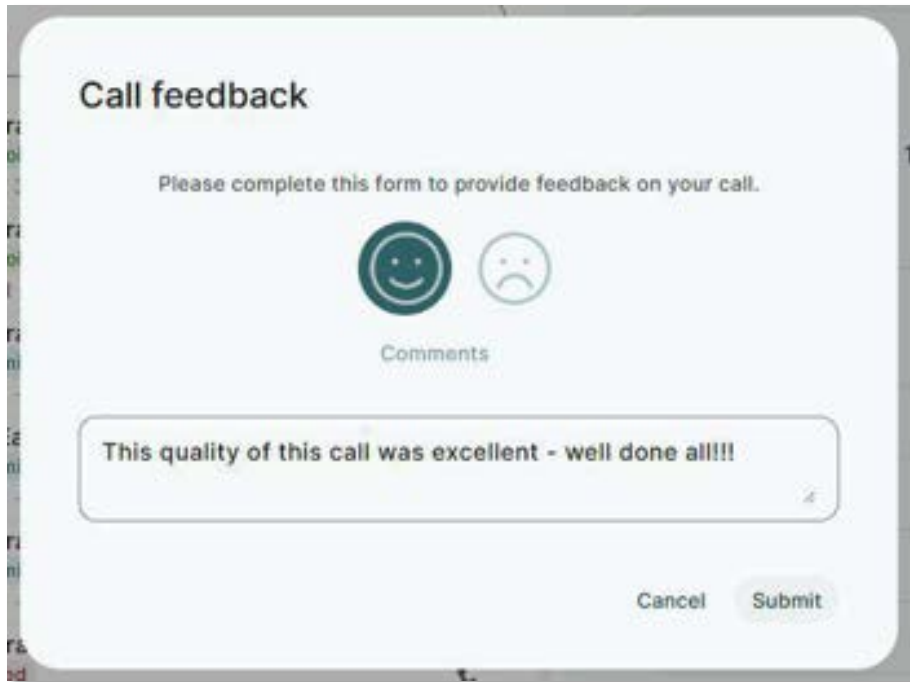
Click the Feedback button in the top-left corner of the call history detail pane.



The Call feedback panel will appear.



Select the happy face to provide positive feedback, enter a comment and click 'Submit'.



The image shows a 'Call feedback' form. At the top, it says 'Please complete this form to provide feedback on your call.' Below this are two circular icons: a green smiley face and a grey frowny face. The smiley face is selected, indicated by a dark green border. Below the icons is a text input field containing the comment 'This quality of this call was excellent - well done all!!!'. At the bottom right are 'Cancel' and 'Submit' buttons.

Call feedback

Please complete this form to provide feedback on your call.

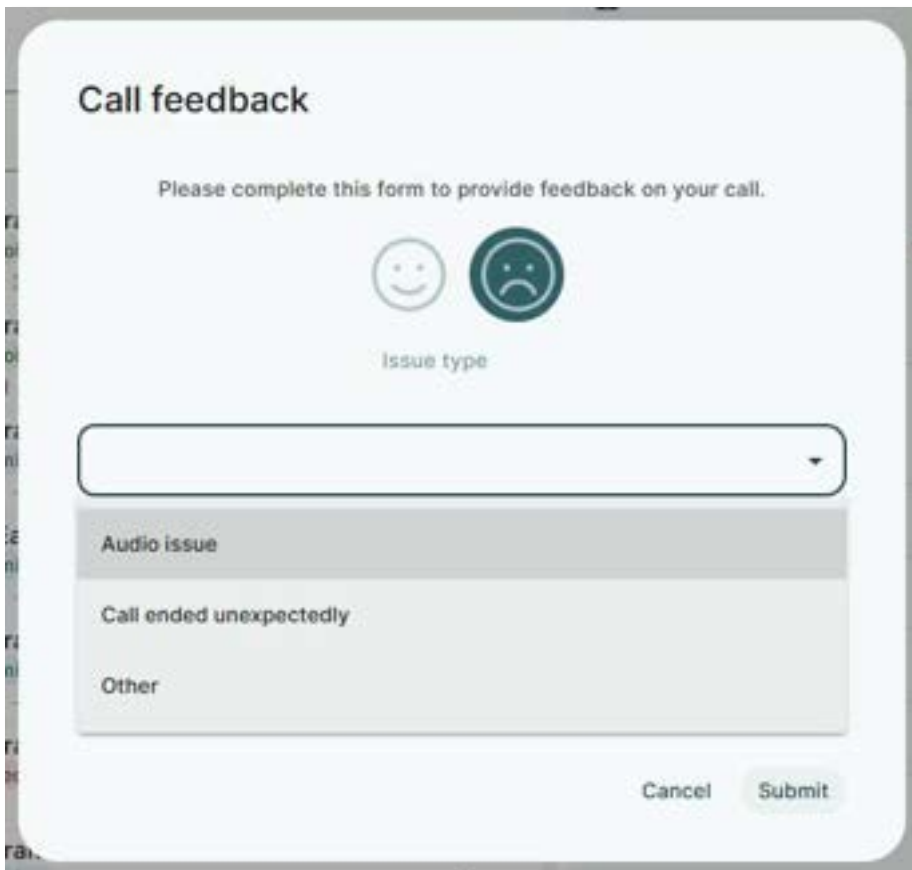
☒ ☐

Comments

This quality of this call was excellent - well done all!!!

Cancel Submit

Alternatively, select the unhappy face to provide feedback requiring investigation. Firstly, select an Issue type: 'Audio issue', 'Call ended unexpectedly' or 'Other'.



The image shows the same 'Call feedback' form, but with the frowny face icon selected. Below the icons is a dropdown menu labeled 'Issue type'. The dropdown is open, showing three options: 'Audio issue', 'Call ended unexpectedly', and 'Other'. At the bottom right are 'Cancel' and 'Submit' buttons.

Call feedback

Please complete this form to provide feedback on your call.

☐ ☒

Issue type

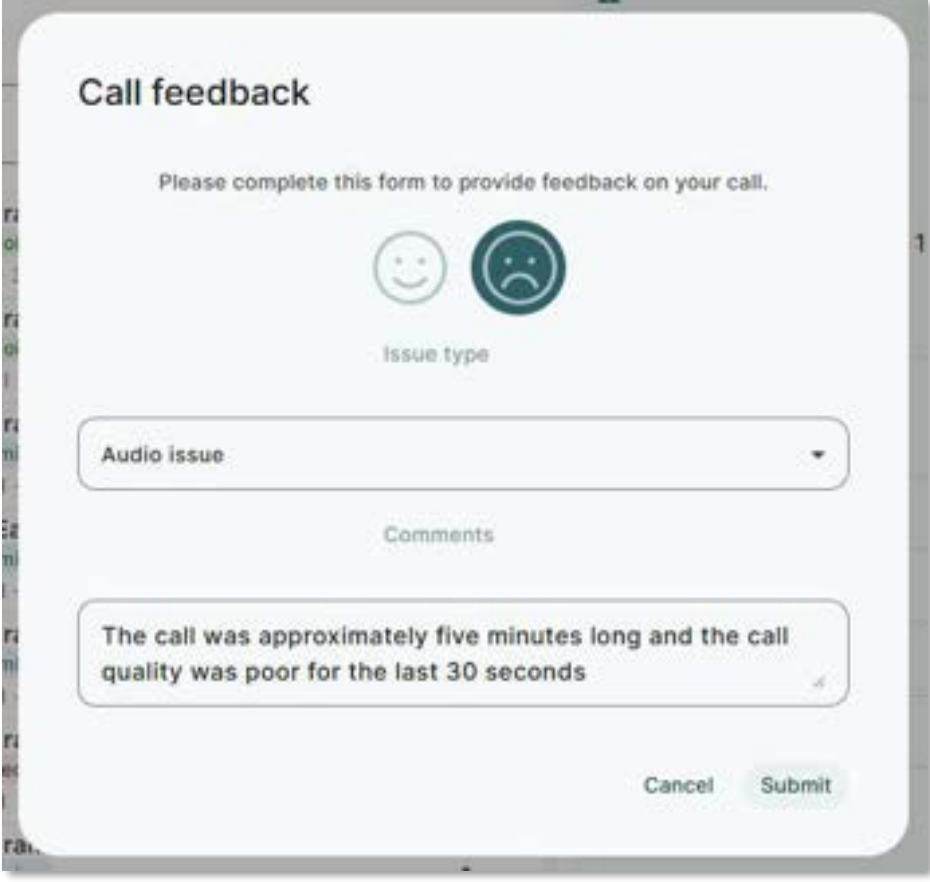
Audio issue

Call ended unexpectedly

Other

Cancel Submit

Enter a comment and click 'Submit'.

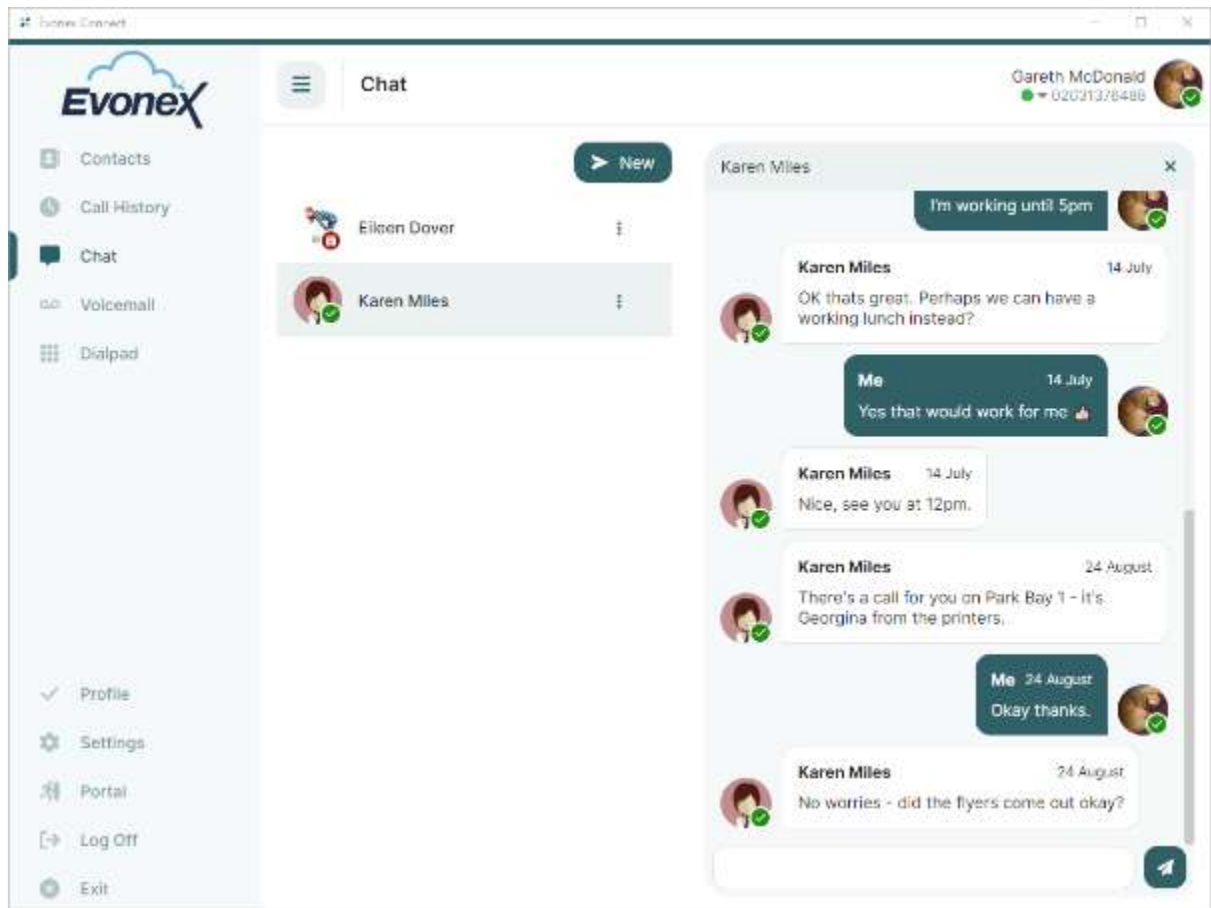
A screenshot of a 'Call feedback' form. The form has a light blue background and rounded corners. At the top, the title 'Call feedback' is in bold. Below it, a subtitle says 'Please complete this form to provide feedback on your call.' There are two circular icons: a light blue smiley face and a dark blue frowny face. The frowny face is selected. Below the icons, the text 'Issue type' is centered. Underneath is a dropdown menu with 'Audio issue' selected. Below the dropdown is the label 'Comments'. A text area contains the comment: 'The call was approximately five minutes long and the call quality was poor for the last 30 seconds'. At the bottom right, there are two buttons: 'Cancel' and 'Submit'.

Please also contact and inform your support team, so they're able to follow-up with progress of the investigation on your behalf.

Chat

Chat allows you to exchange short messages between your colleagues. You can use chat to send text, emoji (Windows key + full stop) and Web Links.

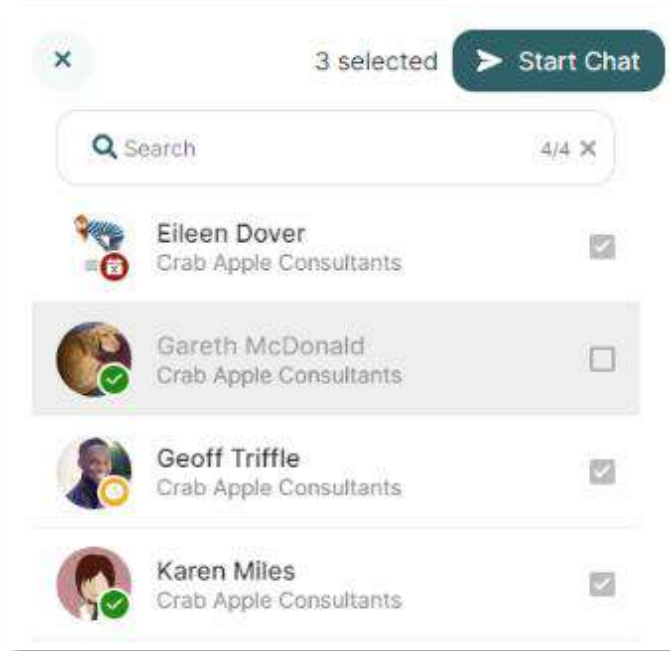
Chat can be useful if you are working in a different location to your colleagues. For example, they could quickly and easily tell you there is a call parked for you. Or you can keep up to date with multiple colleagues all working on a common project via a group chat.



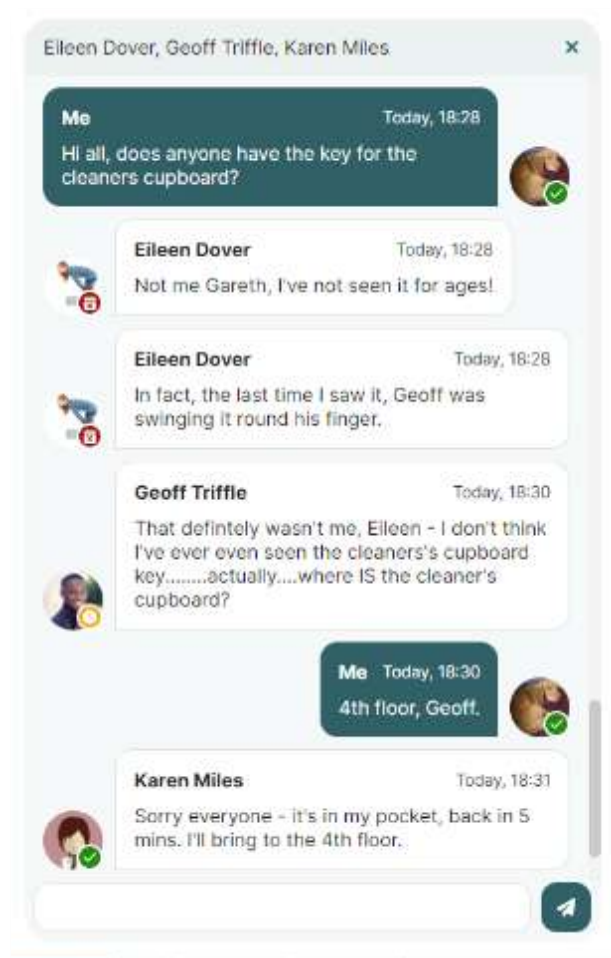
To start a new chat, click the  New button at the top of the Context Pane then search or scroll for the Directory contact(s) you wish to add to the chat. Select one, or as many as required,

and click  Start Chat. Your new Chat window will appear in the Detail Pane. Type

your Chat message and press Enter or click  Send.

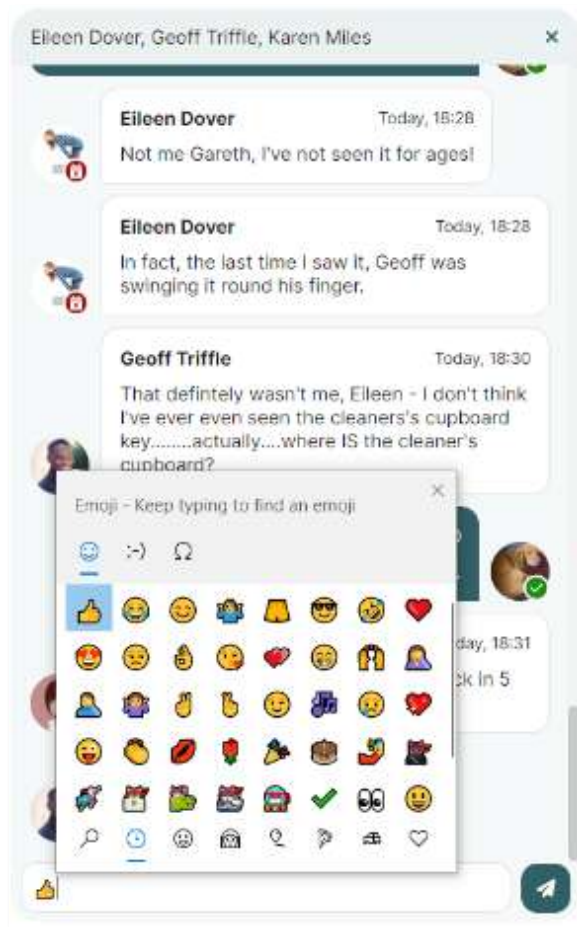


Start a new Chat



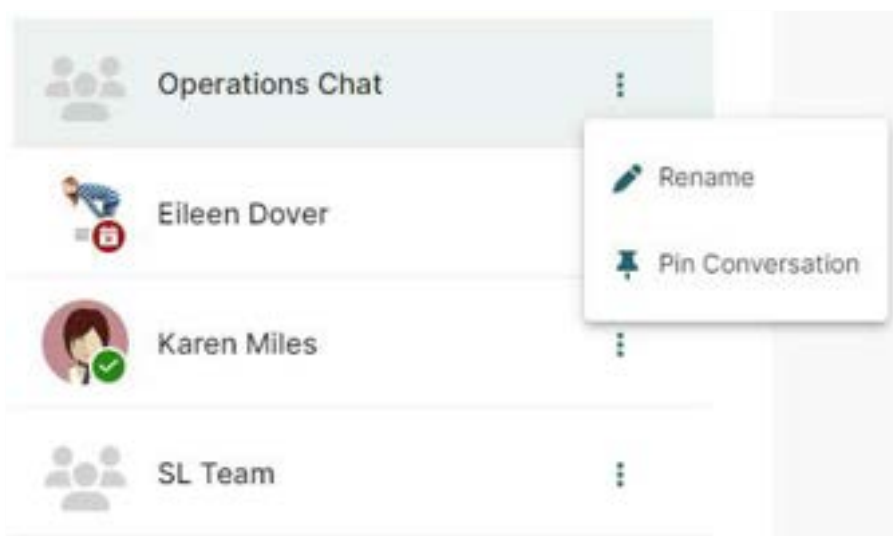
Chat thread in progress

You may press the Windows and full stop keys together to open the Emoji keyboard and select one to send. You may also paste web links.

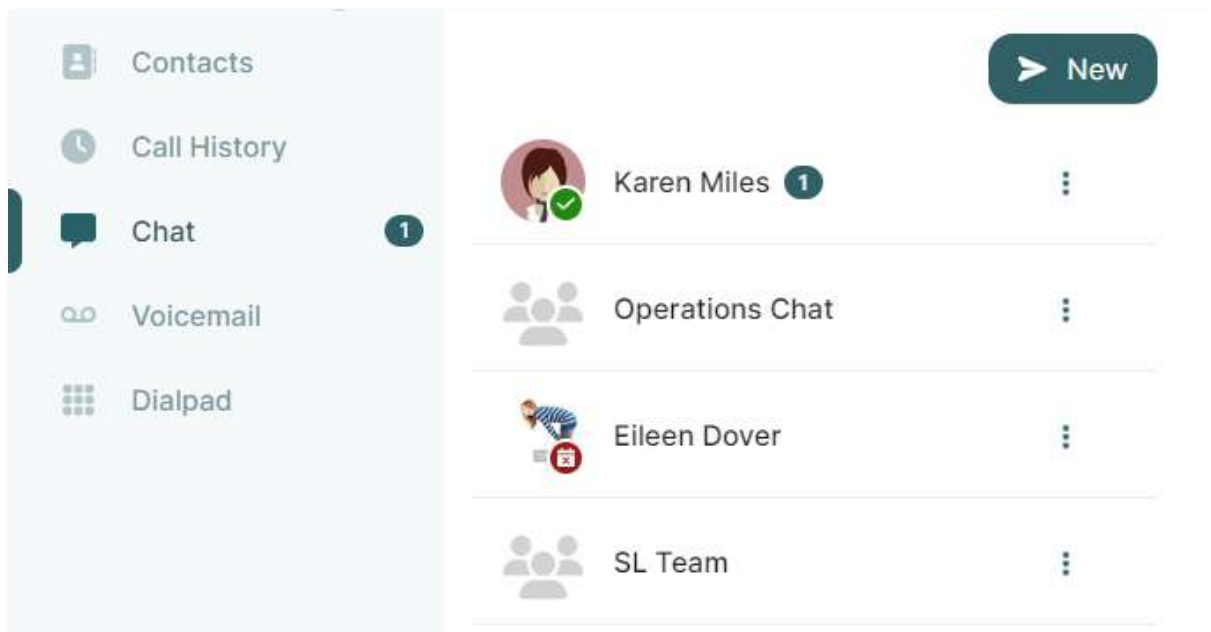
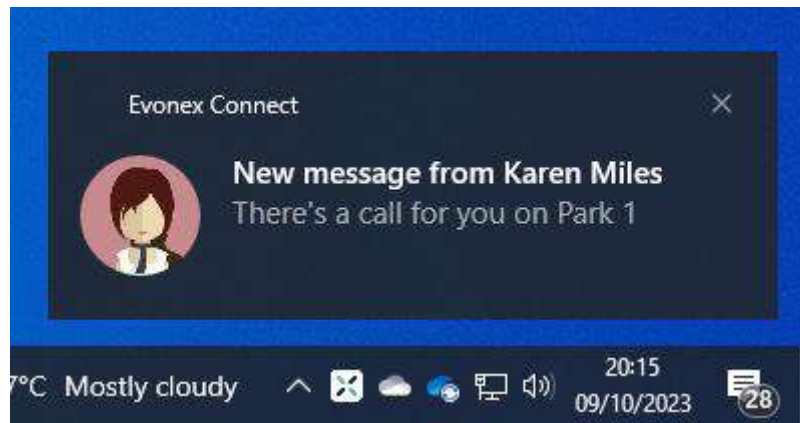


Reply with Emoji

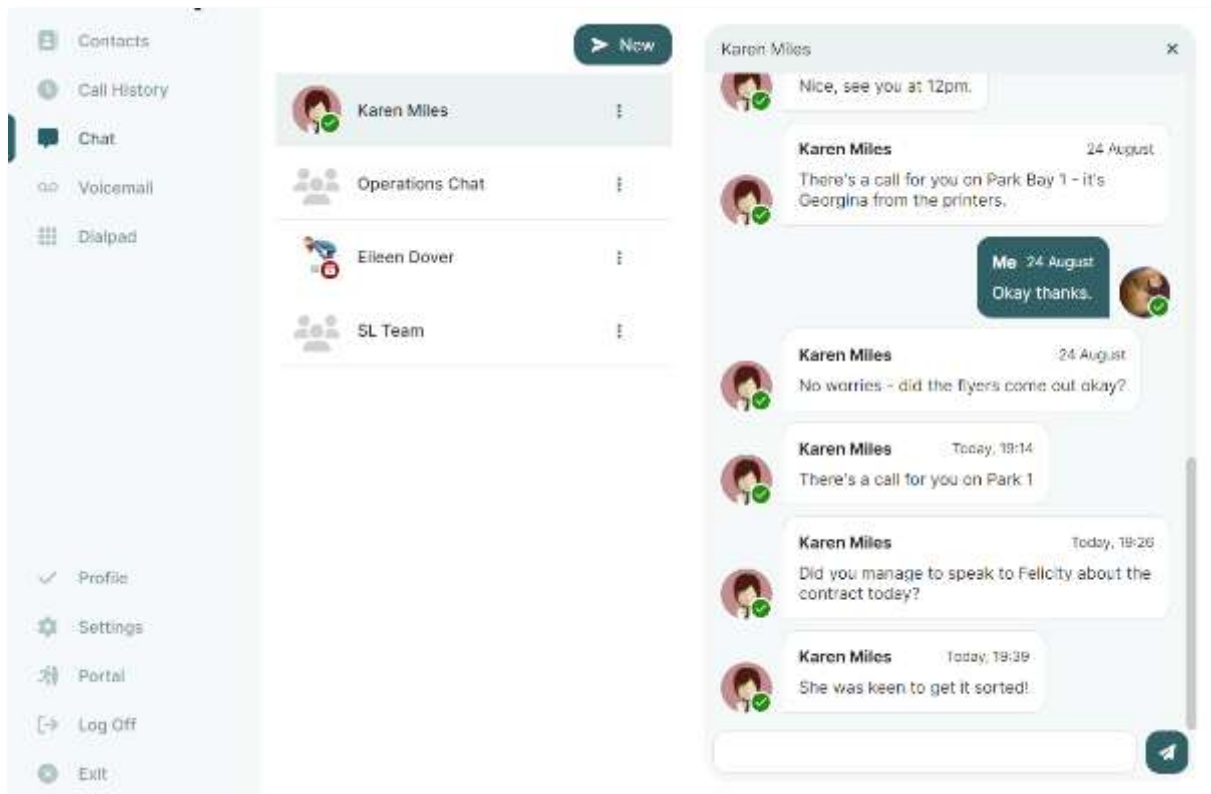
You may Rename a chat you created or Pin at chat by clicking on the three lines next to each chat and selecting the required action.



When you receive a new Chat message, you will hear a notification sound and see a notification popup. You will also notice a notification badge next to 'Chat' in the Menu Pane.



When you select the new Chat message in the Context Pane, the notification badge will disappear, and the body of the message will be shown in the Detail Pane.



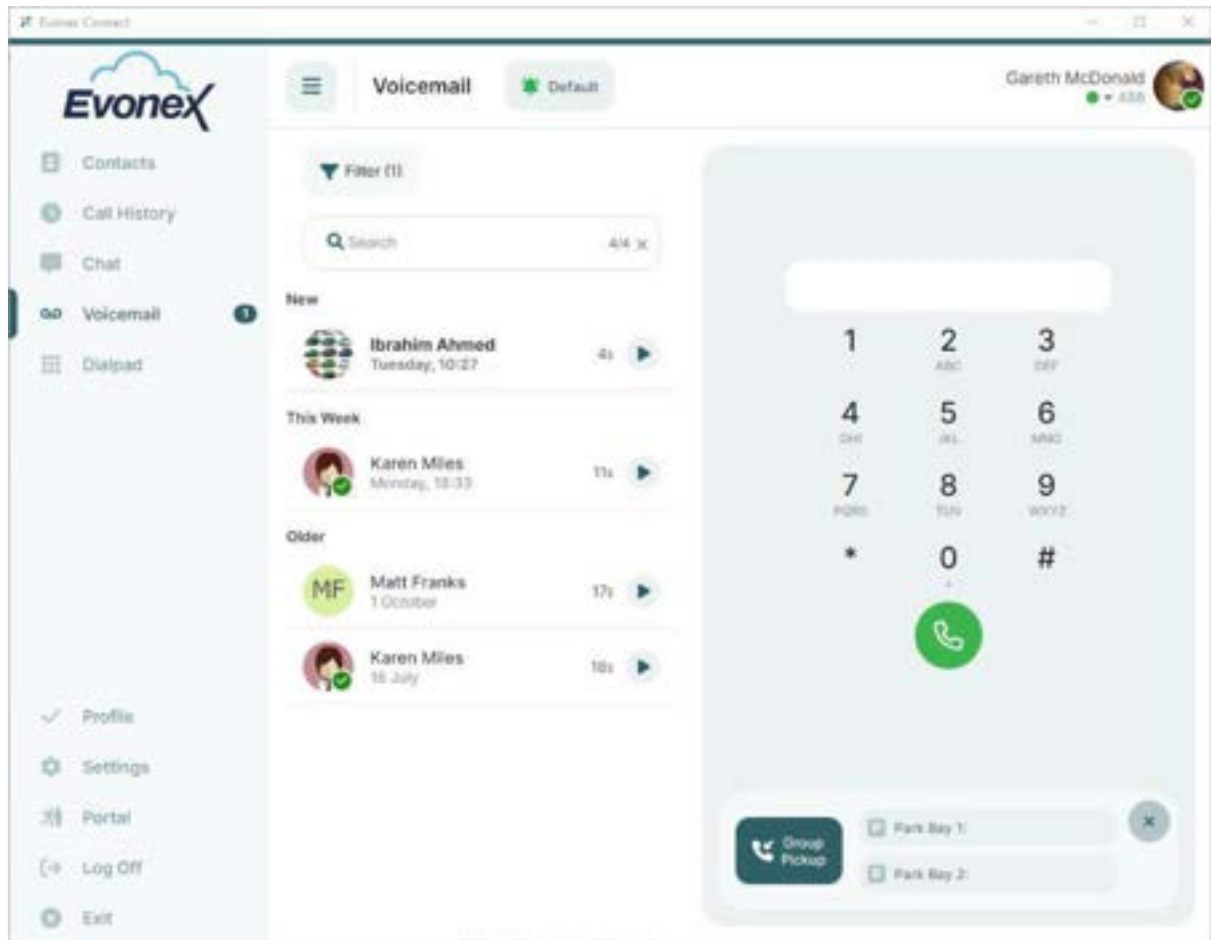
Type your reply and click  Send or press Enter.



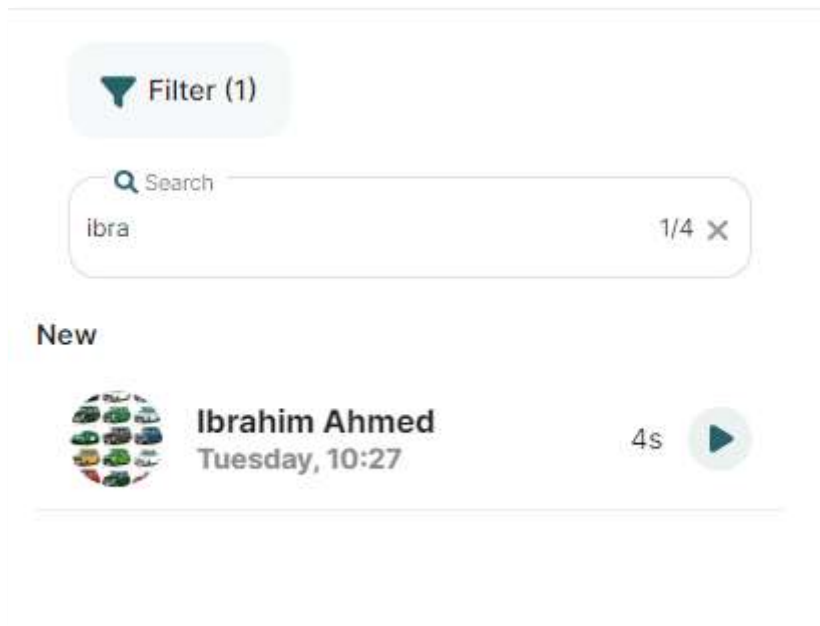
VoiceMail

The VoiceMail message list

The VoiceMail Menu option provides you with a list of your VoiceMail messages in the Context Pane sorted into descending chronological order. There is a  play button available on each message – simply click the button to ‘quick-play’ it.

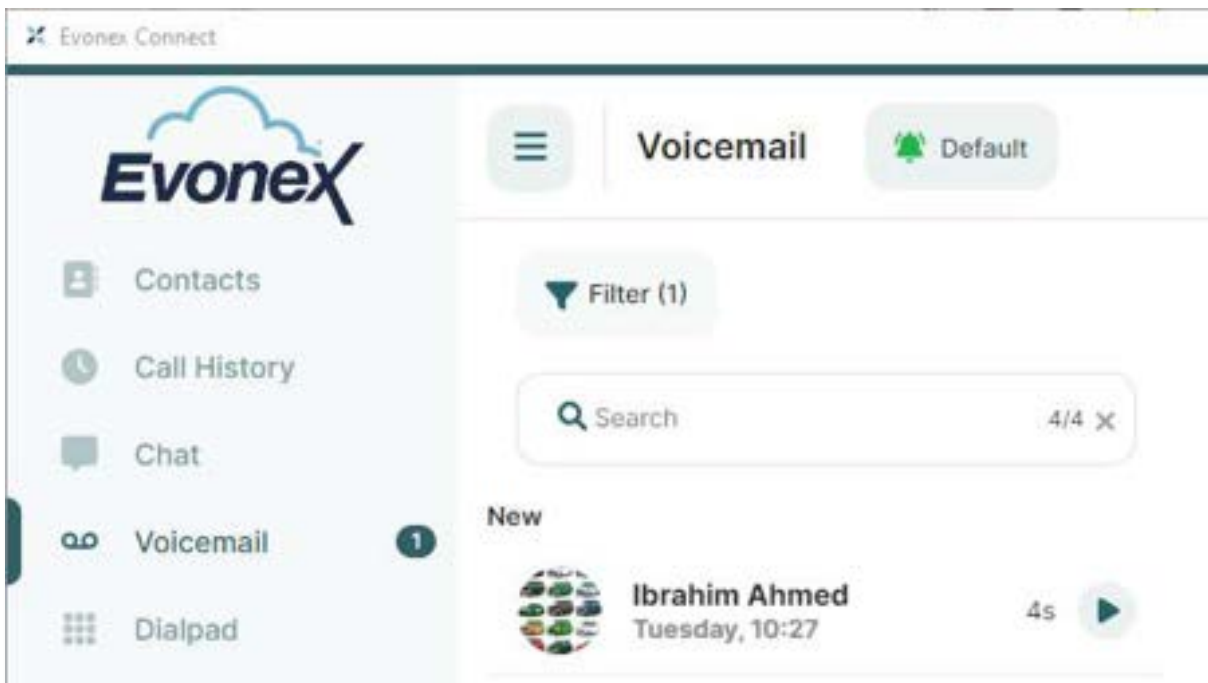


There is a ‘Search’ field at the top of the Context pane which allows you find a specific message(s) if there are many in the list. You may search by name or telephone number. The quantity of messages displayed as a result of your search is shown in the right-hand side of the ‘Search’ field versus the total number of messages in the list.

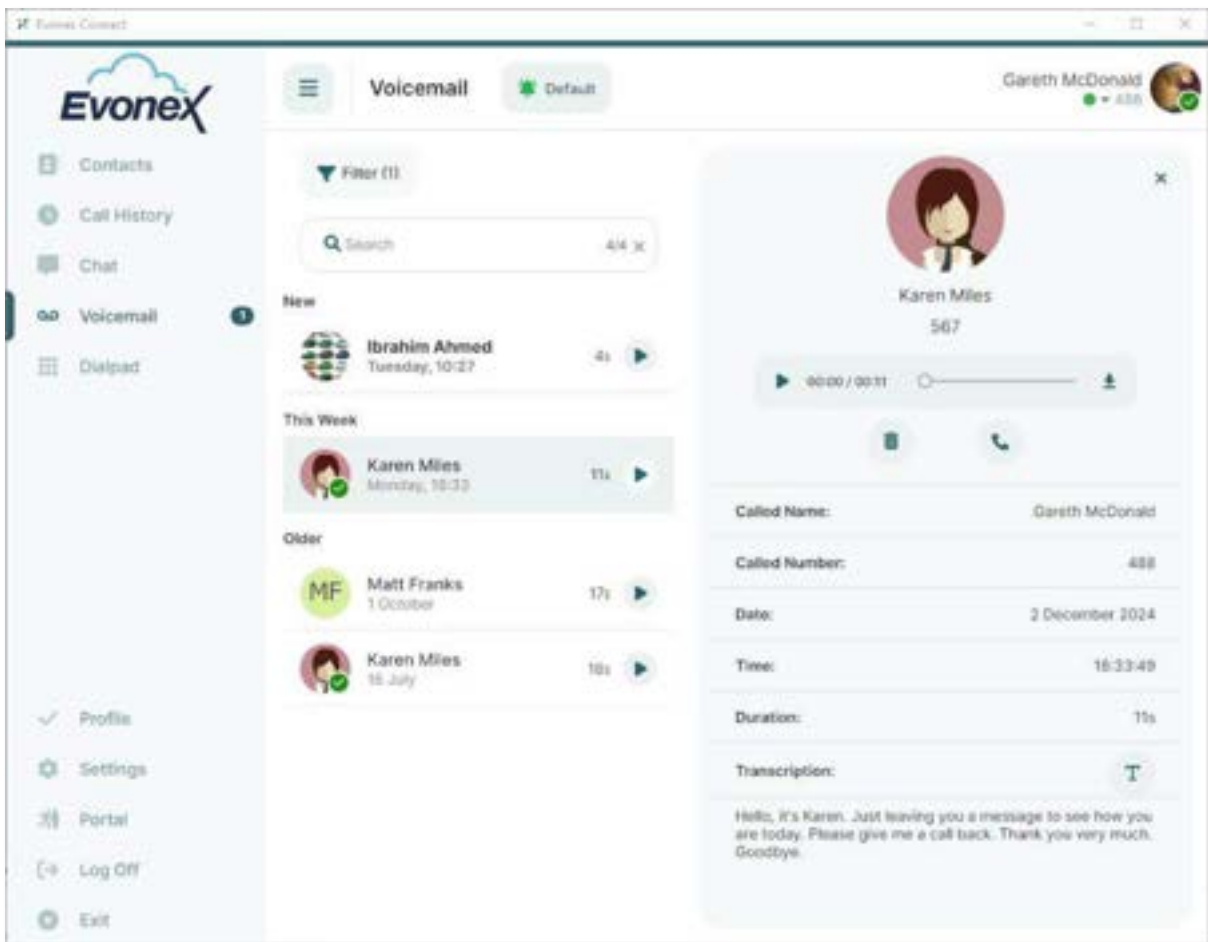


Receiving a new voicemail message

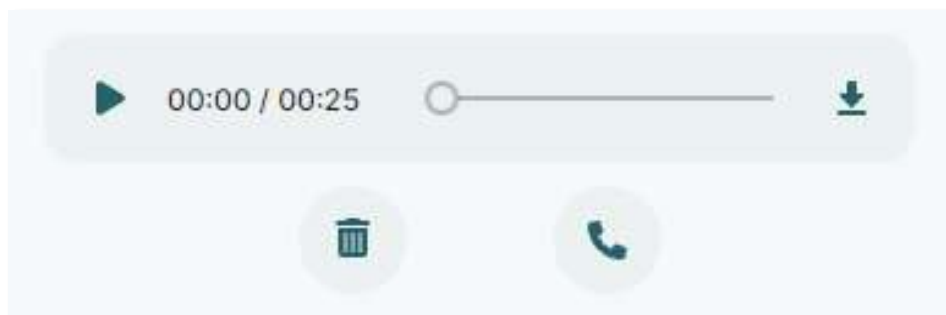
When you receive a new Voicemail message, there will be a notification badge next to 'Voicemail' in the Menu Bar. The telephone number or Contact name or telephone number will be emboldened until you have listened to the message. New messages are always shown at the top of the list.



Selecting a Voicemail message in the Context Pane shows more detail of the message in the Detail Pane. You can view who the caller was – matched to an address book entry if applicable – and you'll also see the number they called, the date, time and duration of the message.



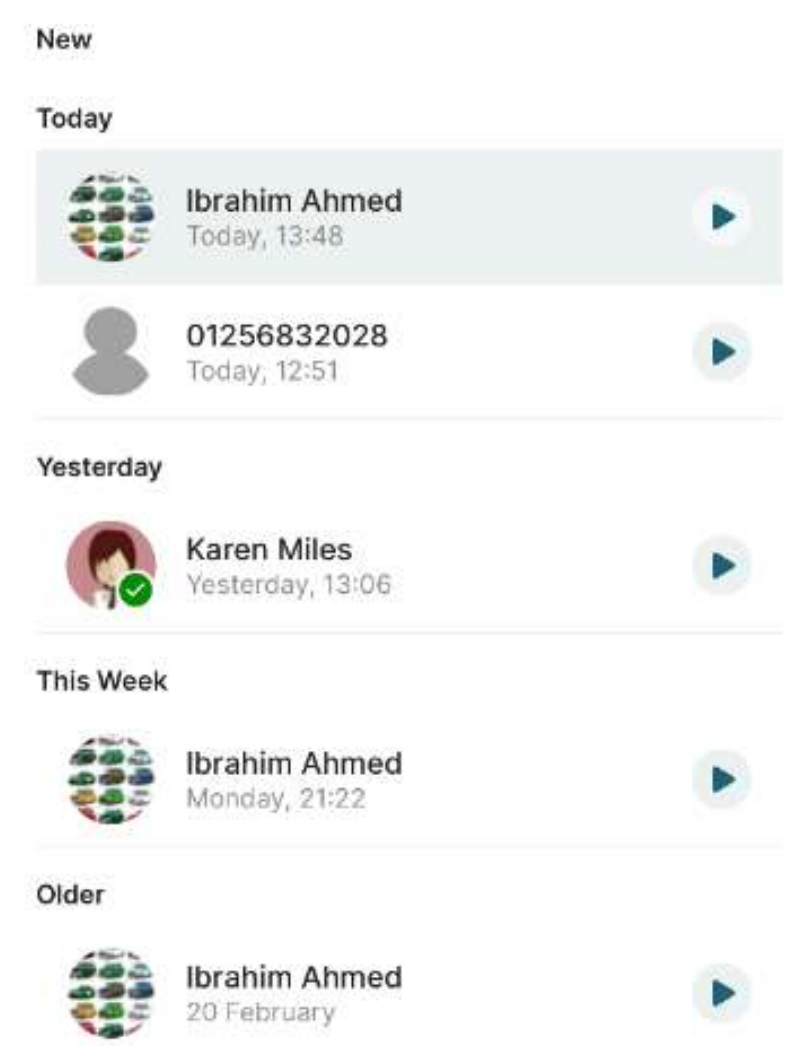
From here, you may also play back the message by clicking the play button. You may download the message to your computer by clicking the download button. You may also delete the message or call back the sender of the message by clicking the respective buttons below the scrub bar.



You're also able to read a transcription of the message by tapping the  button. When you tap this button, the system analyses the speech in the message, converts it to text, and displays it on screen.



When a message has been listened to it becomes marked as old and it moves to one of five headings depending on when the message was recorded: 'Today', 'Yesterday', 'This Week', 'Last Week' and 'Older'. It will be sorted into your other old messages in descending chronological order.



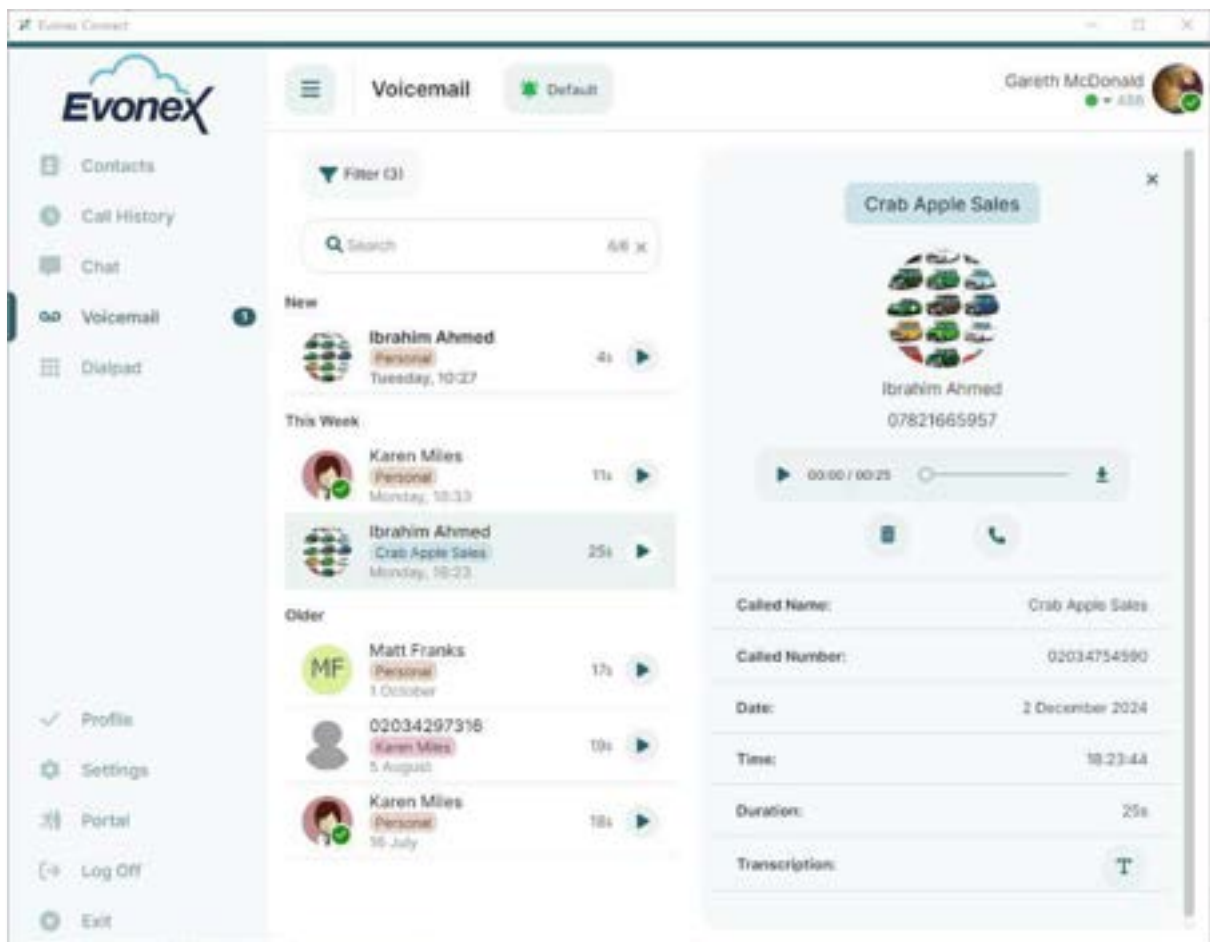
Shared or Group voicemail inboxes

Evonex Connect supports Shared or Group mailboxes. That means, if your administrator allows, you can monitor the voicemail messages in your colleague's mailbox or in a Group mailbox like 'Sales'. You'll be able to get notifications of new messages, play and delete them, read a transcript, or call back the sender, just as you can with your own messages.

When this is enabled, you'll notice a 'tag' has been automatically applied to the messages in the Voicemail message list. The name of the tag is the name of the user associated with that mailbox. Your own messages will be tagged with 'Personal' so you can easily identify them in the list.

The colour of the tag is deterministic and therefore uniform across you and your colleague's Evonex Connect devices. For example, 'Crab Apple Sales', in the example below, is a blue tag – this will also be a blue tag for your colleagues, if they are monitoring this mailbox too.

The message detail pane also shows a corresponding tag at the top. On both panes, the telephone number of the caller, and name if saved as a contact, as well as the date are preserved and shown.



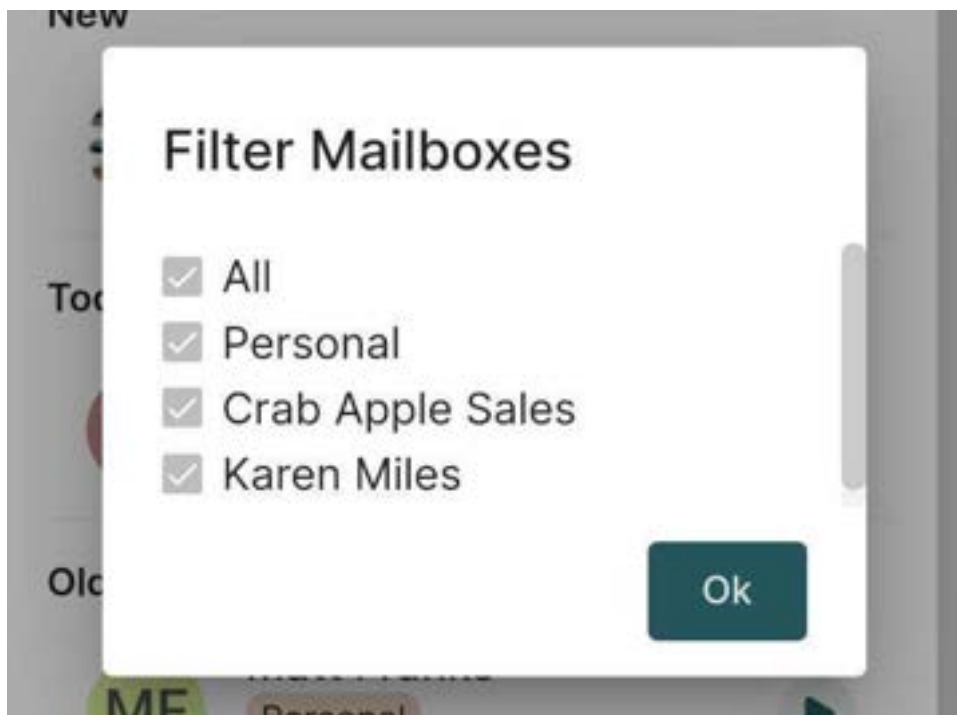
Example of a user monitoring messages in the 'Crab Apple Sales' and 'Karen Miles' mailboxes. The user's own messages are tagged as 'Personal'

Filtering messages

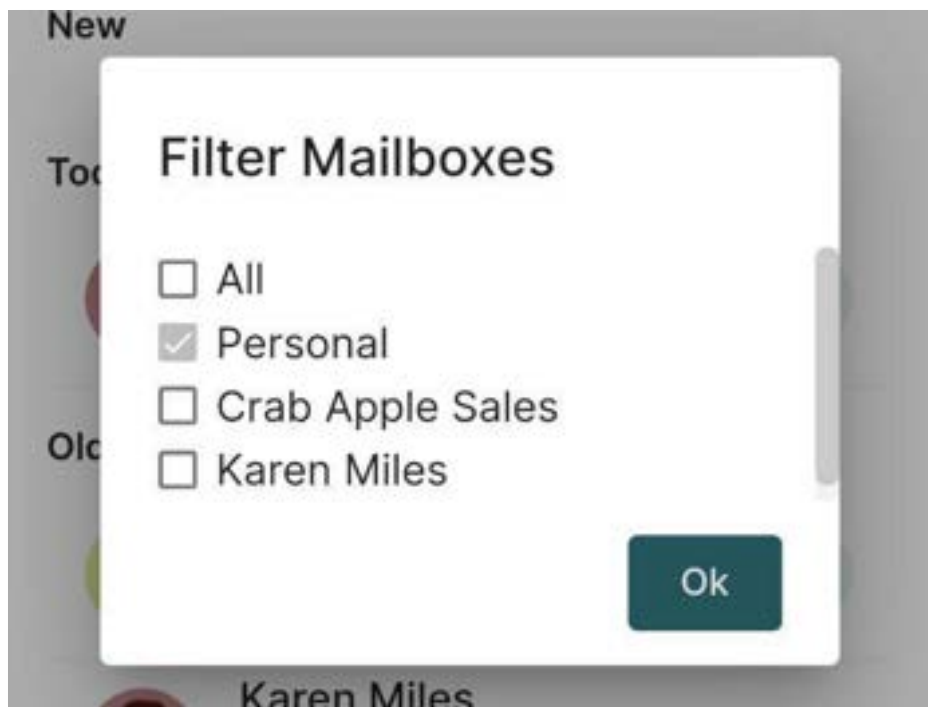
Use the 'Filter' button at the top of the Voicemail list pane to toggle the display of messages within the mailboxes you're monitoring. The number on the button indicates how many mailboxes you're currently displaying messages for.



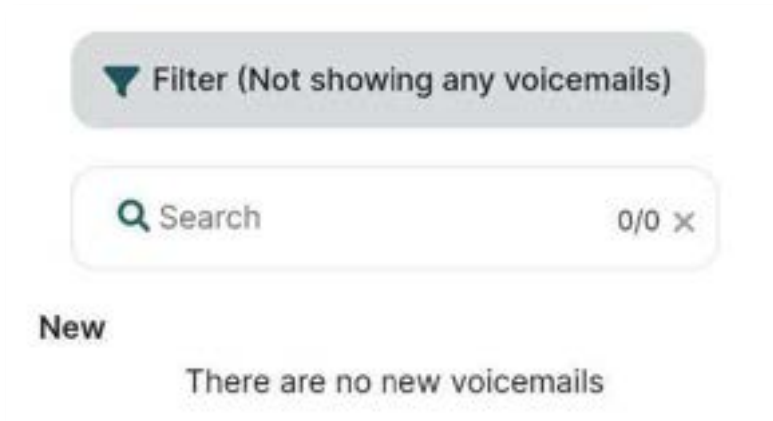
Clicking the 'Filter' button shows the mailboxes you've permission to monitor with a checkbox next to each one. The default is that 'All' mailboxes are selected and therefore you'll see all messages you've permission to.



If you wish to see fewer messages, click the checkbox next to a mailbox to unselect it, then click Ok. You will then only see messages within the mailboxes that remain selected



If 'Not showing any voicemails' is shown on the 'Filter' button, you have inadvertently unselected all mailboxes. Click the button and select one or more checkboxes to rectify this.



You may also combine the Search feature with Filtering. Any searches you perform will apply only to the mailboxes you currently have selected. You may search by the caller's name, caller's telephone number or mailbox name.

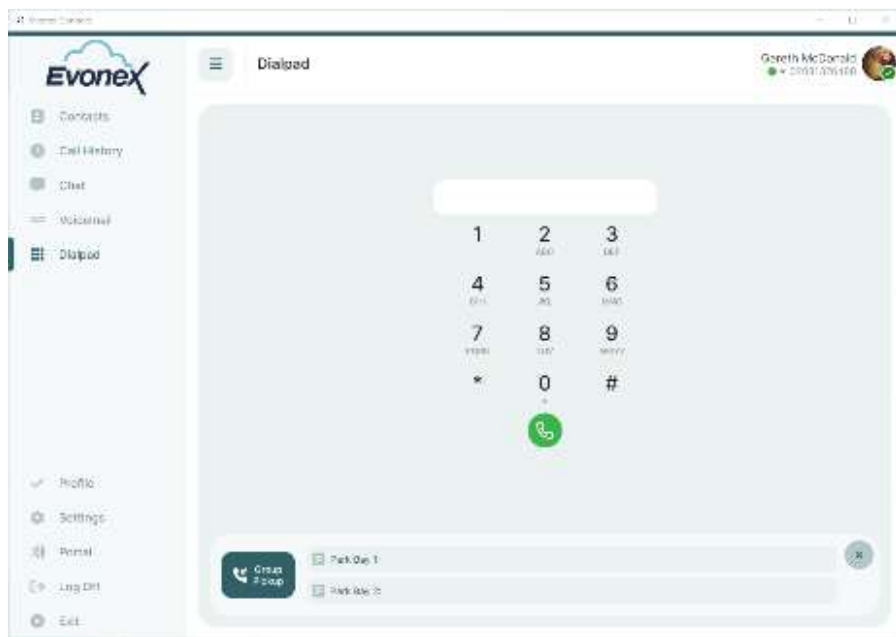
Dialpad

The Dialpad screen allows you to manually enter a telephone number to dial. You may either click the digit buttons on the Dialpad, use the numerical keys on your keyboard, or paste a telephone number copied from another application. When entering digits, you will hear a tone as each digit is clicked. You may disable these tones by going to 'Settings > Audio > Dialpad key tones'.

To dial the digits entered, press the Enter key or click the green  Dial button.

If you enter characters that are not numerical, they will be ignored when dialling.

You may long-click the '0' button or use the keyboard to enter a + sign for international destinations.



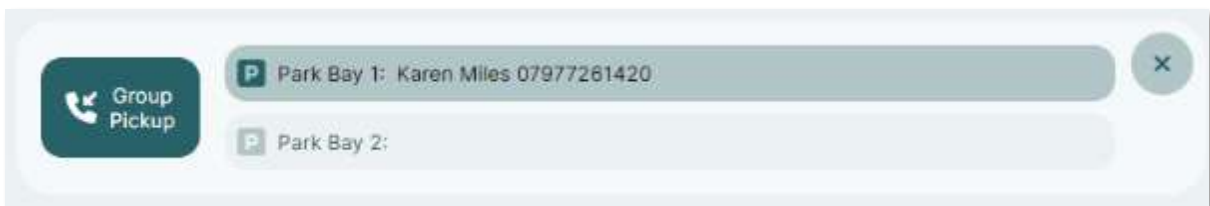
If you make mistake when entering digits and wish to delete some already entered, click the  back button or press the delete or backspace keys on your keyboard. Long-click on the back button to delete all digits entered.



The Dialpad also provides access to the Park Bays and Group Pickup button.



Parking is a way to place a caller on hold so that they may be UnParked by any other user on your account. The Park Bays are used to provide visual indication that a call has been Parked, either by you or one of your colleagues. When a call is Parked in a Bay, simply click the relevant Park Bay to UnPark the call. For further information, see the [Parking](#) section.



Use the Group Pickup button to answer a call you can hear ringing on another telephone or if you notice one or more of your colleagues' Presence statuses shows as 'Ringing'.

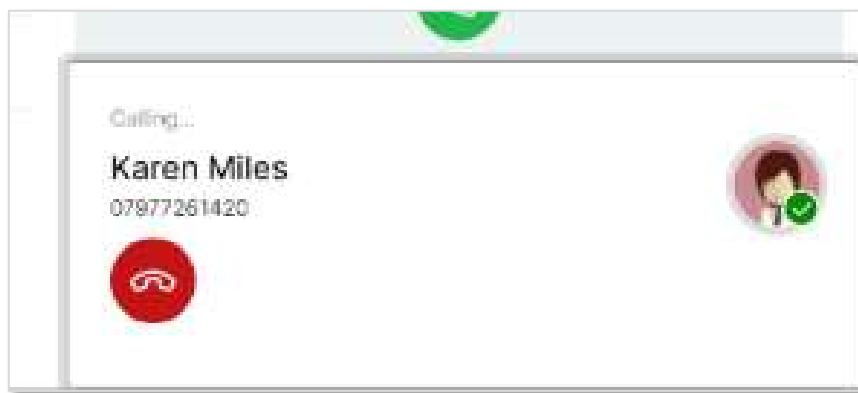
Simply click the Group Pickup button to connect to the ringing caller. Please note, you must be part of the same Pickup Group as the phone you're trying to pick up – please speak to your Support Desk for further details.

Call Handling

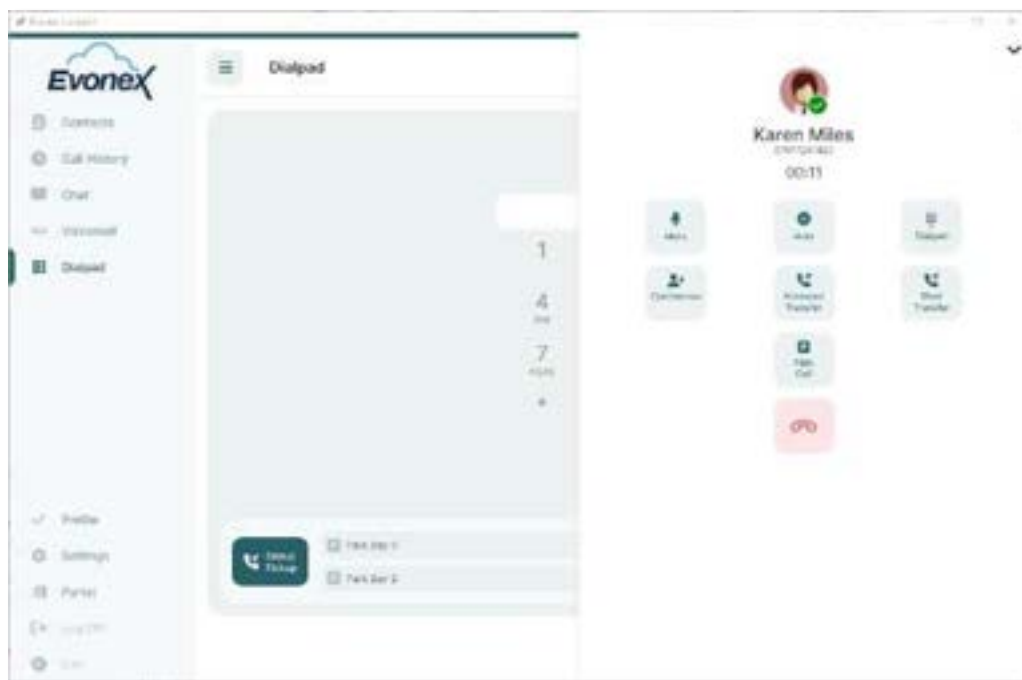
Make a call

As shown elsewhere in this guide, there are several ways to make a call with Evonex Connect. You may dial a Contact by clicking the call button, you may redial or return a call via Call History, you may enter a number to dial via the Dialpad, or you may Click-to-dial telephone numbers on websites and emails. You may also switch between 'Softphone mode' (the default) and '[Companion mode](#)' if you would prefer Evonex Connect to control your desk phone rather than use a headset with your computer.

In all cases, when the call is in progress, you will notice a popup in the bottom right-hand corner of Evonex Connect. To end the call before it is connected, click the Hang Up button.



When the call is connected, the Call Control Pane appears. The Call Control Pane allows you to perform such tasks as hold, transfer and park the call which will be covered later in this guide.



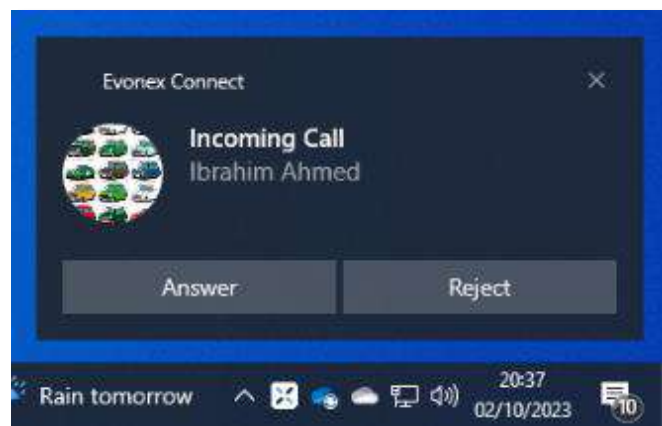
You may minimise this Pane at any time by clicking the down arrow in the top-right-hand corner of the screen.



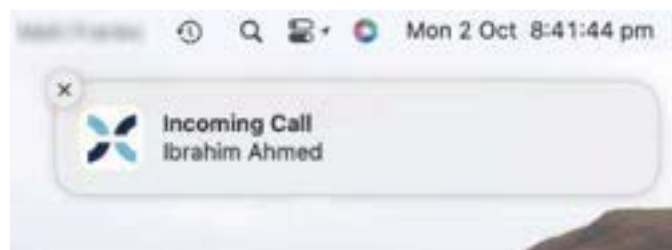
The minimised view contains quick access to the Hold, Mute and End buttons. Click the Up arrow or anywhere on the Call Control Pane to maximise.

Receive a call

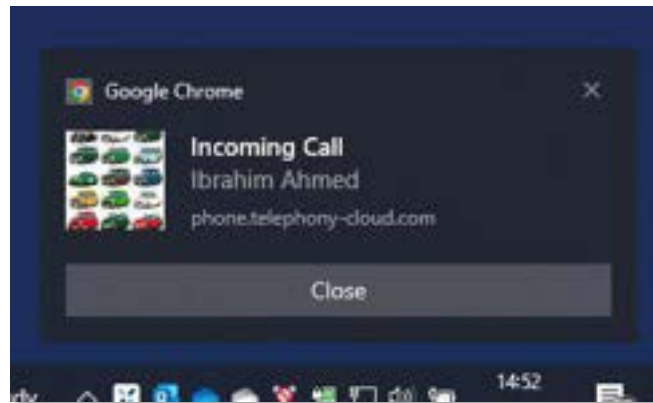
If you receive an inbound call to your telephone number, while Evonex Connect is minimised or in the background, you will see a pop-up notification on-screen. The notifications vary between operating systems, examples are below. In all cases you may click on the notification to bring Evonex Connect to the foreground. For Windows, you may also Answer or Reject the call direct from the notification. Answering the call will maximise or 'pop' the Evonex Connect app with the Call Control Pane in view. Rejecting the call will send the caller to your Voicemail, by default.



Evonex Connect for Windows – notification popup

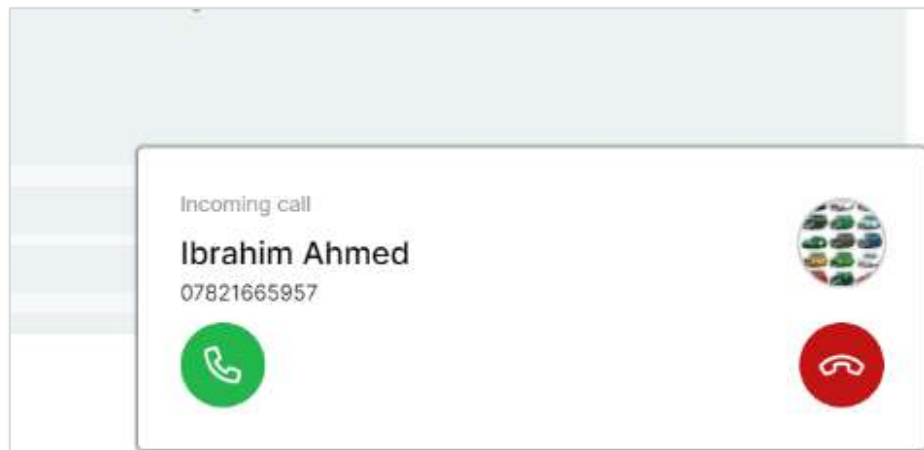


Evonex Connect for MacOS – notification

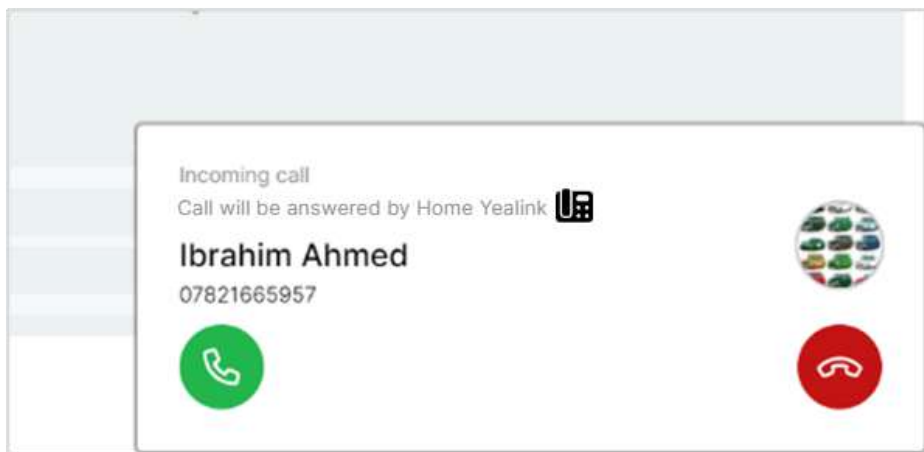


Evonex Connect for Browser – notification popup

If Evonex Connect is maximised and on-screen when you receive a call, the Answer and Reject buttons are displayed as in the image below. Answering the call shows the call as active and brings the Call Control Pane into view. Rejecting the call will send the caller to your Voicemail, by default.



If Evonex Connect is running in Companion Mode with your desk phone, when you receive call you are advised that the call will be answered on said phone when you click the answer button, as shown in the image below.

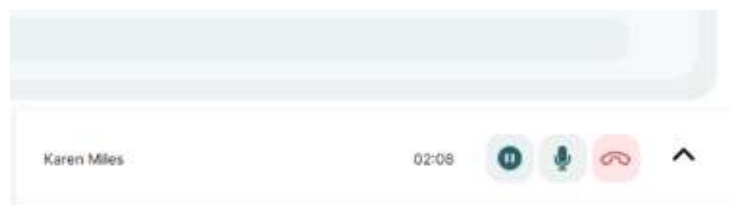


Call Control Pane

When a call is active, the Call Control Pane appears. The Call Control Pane allows you to perform such tasks as hold, transfer and park the call.



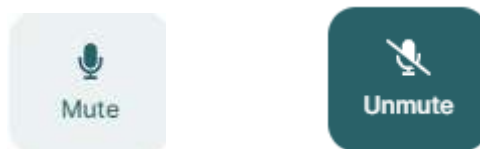
You may minimise this Pane at any time by clicking the down arrow in the top-right-hand corner of the screen.



The minimised view contains quick access to the Hold, Mute and End buttons. Click the Up arrow or anywhere on the Call Control Pane to maximise.

Mute

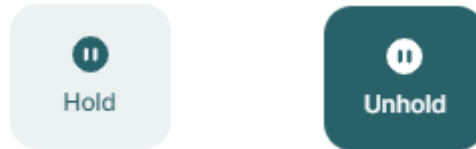
Clicking the 'Mute' button will mute your microphone so the caller cannot hear you. The button will change to 'Unmute'.



Click to unmute your microphone.

Hold

Clicking the Hold button will put the caller on hold. They will hear hold music while on hold. The button will change to 'Unhold'.



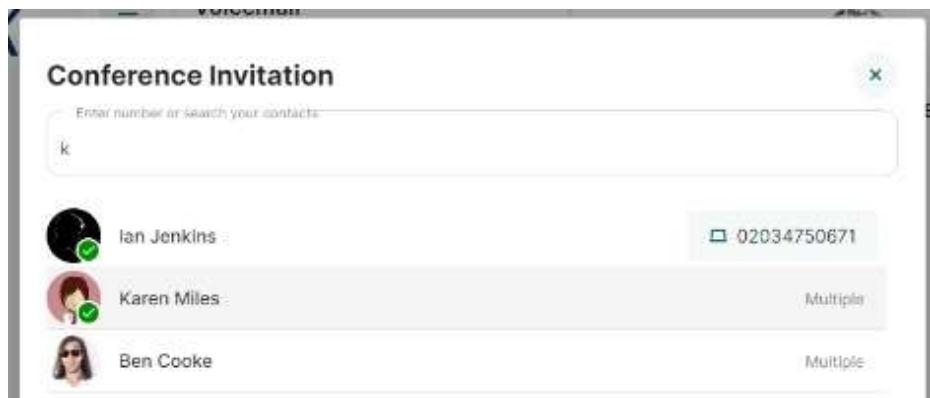
Click to return to the caller.

Three-way Conference

To make a three-way Conference call, firstly you must have an active two-way call. This call could be one you make or receive.

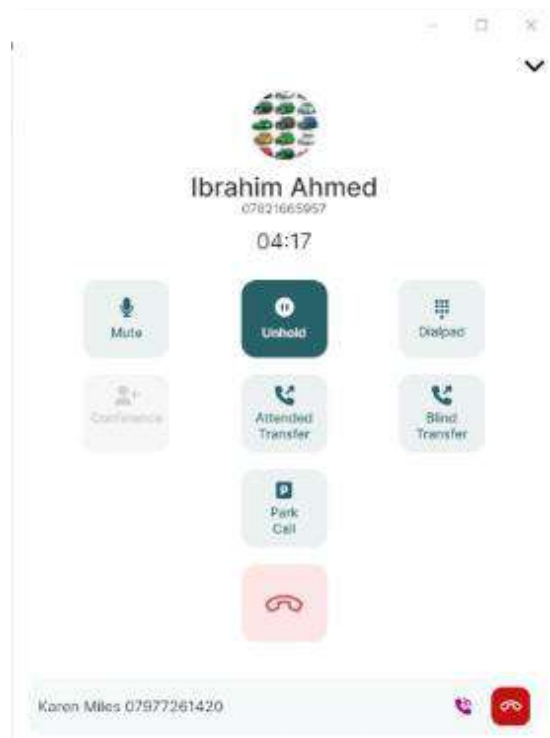


Next, click the Conference button and select or search for the Contact you wish to add to the call from the resulting window. During this process you may still talk to and hear the original caller.



Click the telephone number of the contact and the Evonex Connect will attempt to call the number. The original caller will be placed on hold. You will see the call to the third party appear as a new call

below the original one, with a  purple pulsating handset to indicate the call is ringing. The original call is still on hold.



When connected, the new call becomes active and therefore the calls swap round on the call control pane. You are now able to talk to the new caller without the original caller hearing the conversation.



Press the toggle  button to toggle between this caller and the caller on hold.

When you are ready to join all calls together, click the  green + button. At this point, all three parties can talk to each other.



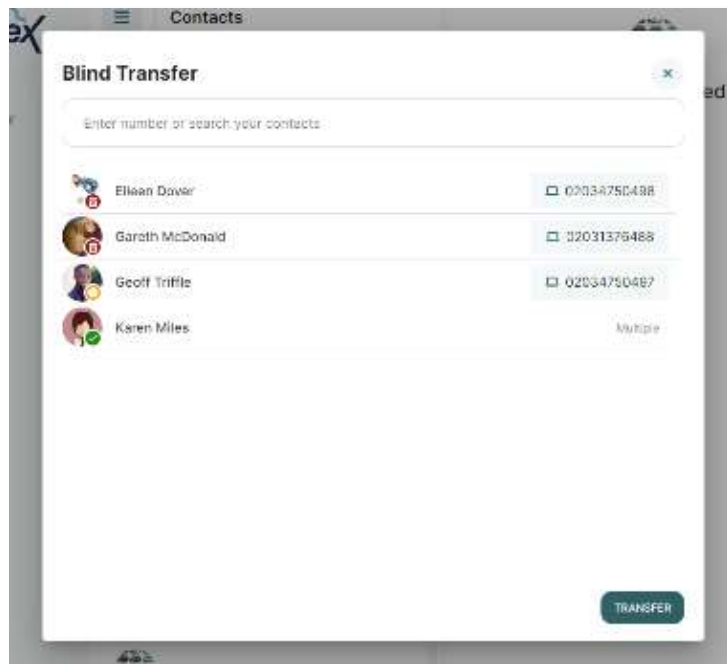
You may end either call by clicking the corresponding  or  red 'End' buttons.

Blind Transfer

To Blind Transfer the call, that is to transfer it to another number straight away, press the 'Blind Transfer' button.



Then, select or search for the Contact you wish to Transfer the call to from the resulting Search Pane. You may enter alphanumeric characters. Click the telephone number next to the desired contact and Evonex Connect will transfer the call to the selected number immediately.

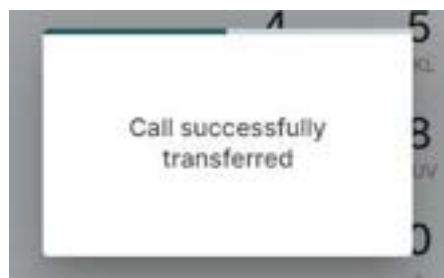


If more than one telephone number exists for the contact, 'Multiple' will be displayed – click the row to display all telephone numbers for the contact and select which one to transfer to. The call is transferred immediately.



When searching by telephone number, if no match is made, you may still transfer a call to the entered number by clicking the  button.

When the transfer is complete, you will receive a confirmation message:



Attended Transfer

To Attended Transfer the call, that is to transfer it to another number so you can notify the destination before completing the transfer, press the 'Attended Transfer' button.



Then, select or search for the Contact you wish to Transfer the call to from the resulting Search Pane. You may enter alphanumeric characters. Click the telephone number next to the desired contact.

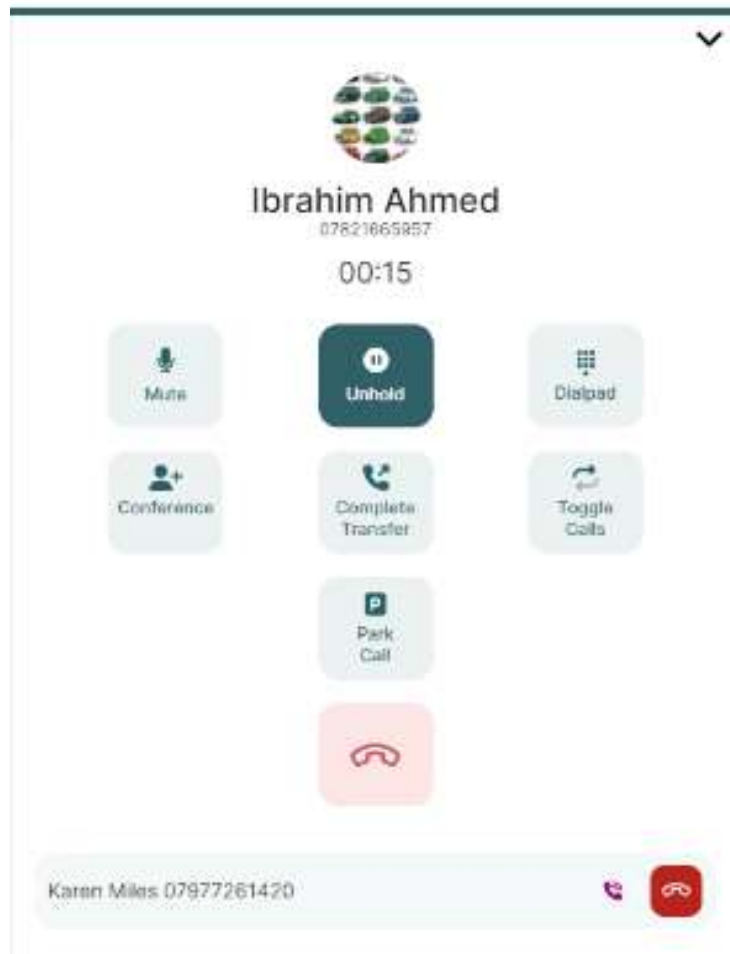
When searching by telephone number, if no match is made, you may still transfer a call to the entered number by clicking the  button.



If more than one telephone number exists for the contact, 'Multiple' will be displayed – click the row to display all telephone numbers for the contact and select which one to transfer to.



Evonex Connect will then place the original caller on hold and start a new call to the destination number you have selected. The original caller will hear hold music until the process is complete.



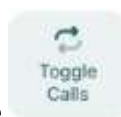
At this point, the call to the transfer destination is shown in a single row below the original caller on

hold. The  purple pulsating handset icon indicates the new call is still ringing. You may click the

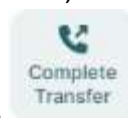
 red handset button to end the call to the transfer destination then click the  'Unhold'

button to go back to the original caller. To end the original call, click the  end button on the main Call Control Pane.

When the transfer destination answers that call becomes active and in focus on the call control pane. As such, the original caller is now shown in a single row below.

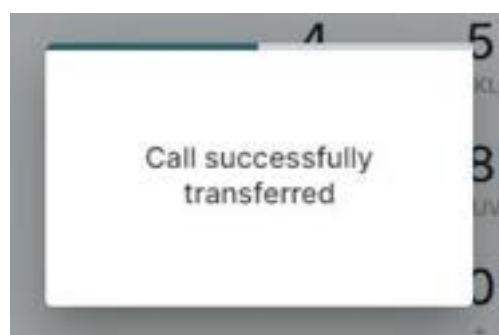


You may use the **Toggle Calls** toggle buttons to swap the active/held calls to allow you to speak to each call independently. The call that active is the only one that you can speak to and hear at that time. The held call cannot hear you, they will hear hold music instead, and you cannot hear them.



When the transfer destination is happy to take the call, click the **Complete Transfer** button. Both calls are now connected together and you no longer have a view or control of the call.

When the transfer is complete, you will receive a confirmation message:



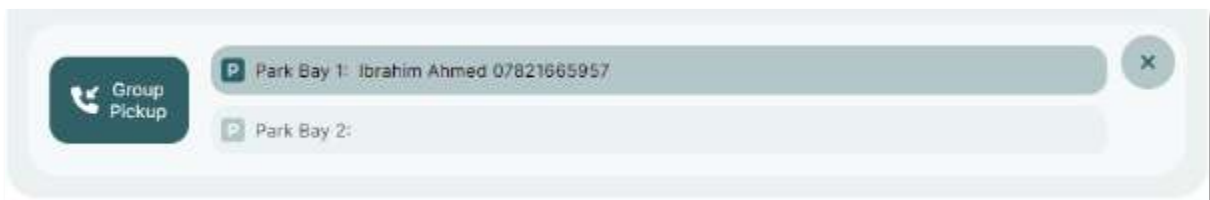
Park

Call Park is a similar feature to Hold except it places the call in a system hold location called a 'Park Bay'. These allow visual indication of Parked calls in Evonex Connect and on managed desk telephones. Your colleagues will be able to see and UnPark calls you have parked, and vice versa.

Park is therefore a useful way to move calls between you and your colleagues without transferring. For example, a colleague could use their Evonex Connect device to Park a call for you, send you a Chat message letting you know, then you could UnPark the call from your Evonex Connect device. You can also use Park to move calls between your own devices.

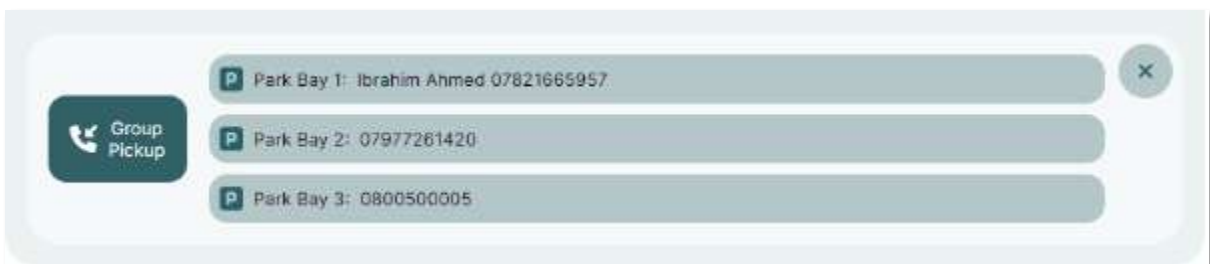


To place an active call into a Park Bay, click the **Park Call** button on the Call Control Pane. The system will place the call into the lowest available Park Bay and confirm with an audible prompt. The caller will hear hold music while Parked. You will also see the call in the Park Bay on the Dialpad or on an UnPark key on a managed desk telephone.



Click the Park Bay to UnPark the call and carry on conversation with the caller.

Two Park Bays are provided in Evonex Connect by default. If all Park Bays are in use when you Park a new call, another Park Bay will appear.



On desktop, if a call has been Parked for too long, it will automatically be presented back to the device that originally parked it. PLEASE NOTE, this is not the case on mobile devices, and the call will drop when the timer expires. Therefore, if a call is parked on a mobile device, please ensure you manually UnPark the call, or keep the mobile app awake until the timer expires.

The park expire timer that controls this is an account-wide administrator setting. An expired Parked call will either ring your Evonex Connect device until you answer, or it will automatically connect you without ringing. This is also an account-wide administrator setting.

If you would like either of these settings adjusted, please contact your support team.

Call Reconnection

Call reconnection was primarily designed for the Evonex Connect mobile apps – [see this section for more details](#). However, due to the common codebase used across all Evonex Connect apps, reconnection will benefit desktop users too.

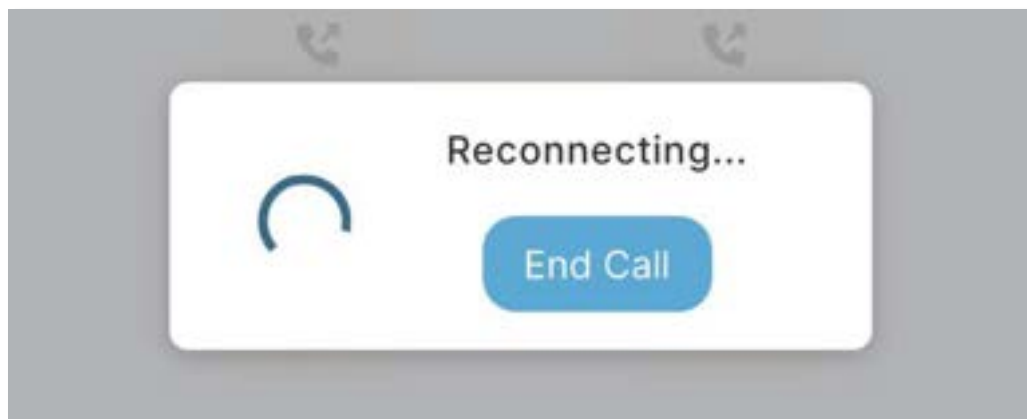
During an active call, whether it is inbound or outbound, if your device's connectivity changes mid-call, Evonex Connect will attempt to reconnect the call.

For example, while on a call if your laptop's ethernet cable is disconnected, Evonex Connect will attempt to reconnect the call and will successfully do so when network conditions allow, e.g. the cable is reconnected, or your laptop connects to a WiFi network.

While Evonex Connect is attempting to reconnect the call, a 'Reconnecting' message will be shown on-screen. The person at the other end of the call will hear silence until the call is reconnected.

If it has not been possible to reconnect the call after a given period, the call will be ended. You may also end the call manually by clicking the 'End Call' button.

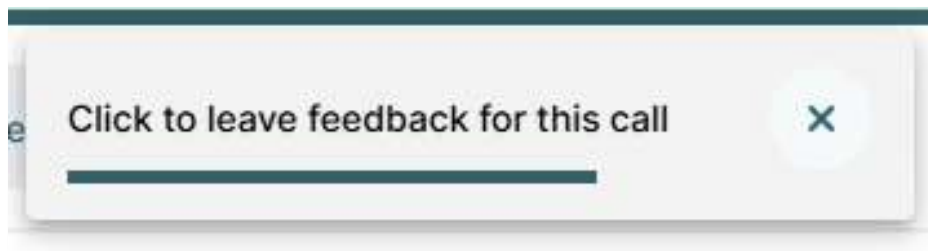
The call reconnection process should take less than 5 seconds if network conditions are optimum.



Call Feedback

From time to time, it may be necessary to send feedback to the Evonex Team regarding a call that has just happened. This could be because you experienced a problem with the call which requires investigation. The information sent to the Team is enough for us to identify the call in our logging and diagnostic tools, such as date, time, telephone numbers, usernames, etc, but no other personal data is sent.

When a call is ended, you will see a banner at the top of Evonex Connect prompting you to 'Click to leave feedback for this call'. The banner is shown for 5 seconds before it is automatically dismissed. You may manually dismiss the banner during this time by clicking the 'X' button.

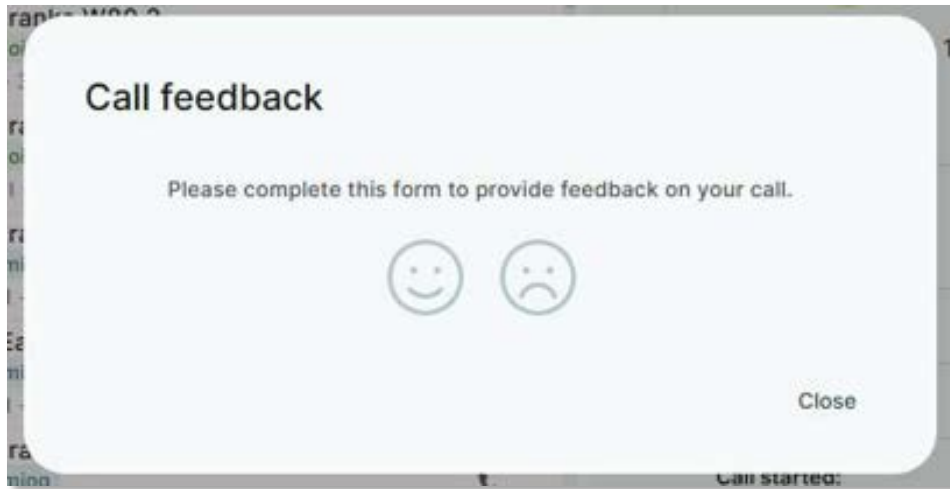


You may prevent the banner from appearing at the end of each call by going to 'Settings' > 'Notifications' and change 'Call feedback popup' to 'Disabled'.



To leave feedback for a call with the banner disabled, you must click the triangle button in the top-left corner of the Call History detail pane for the relevant call. Please see the [Call History > Call Feedback](#) section for further details.

With the banner enabled, to provide feedback for the call, click the banner and the Call feedback panel will appear.



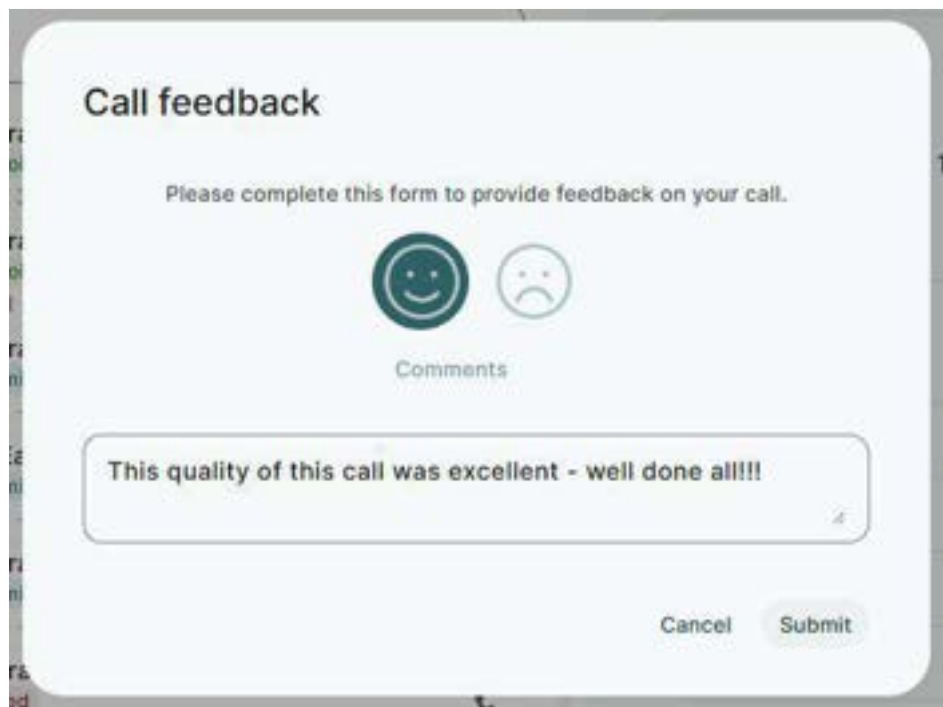
Call feedback

Please complete this form to provide feedback on your call.

Close

Select the happy face to provide positive feedback, enter a comment and click 'Submit'.



Call feedback

Please complete this form to provide feedback on your call.

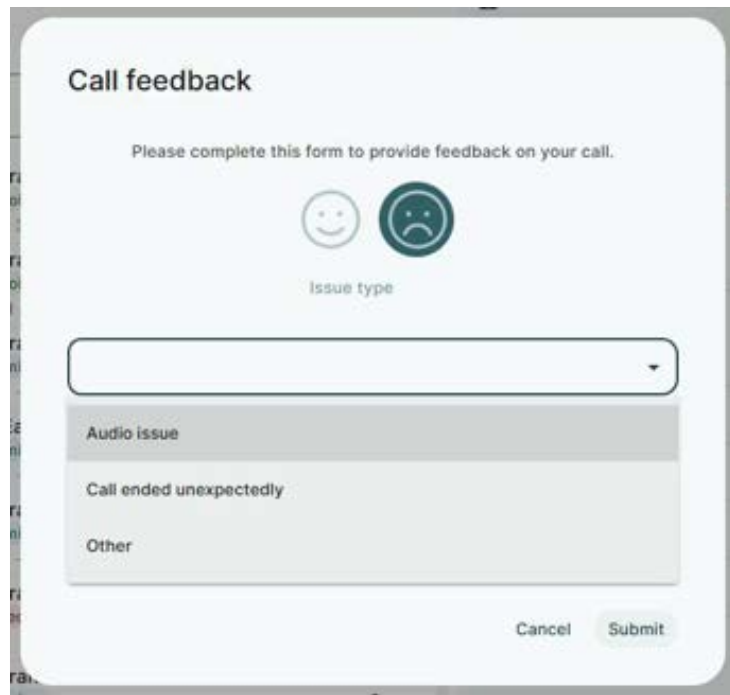
 

Comments

This quality of this call was excellent - well done all!!!

Cancel Submit

Alternatively, select the unhappy face to provide feedback requiring investigation. Firstly, select an Issue type: 'Audio issue', 'Call ended unexpectedly' or 'Other'.



Call feedback

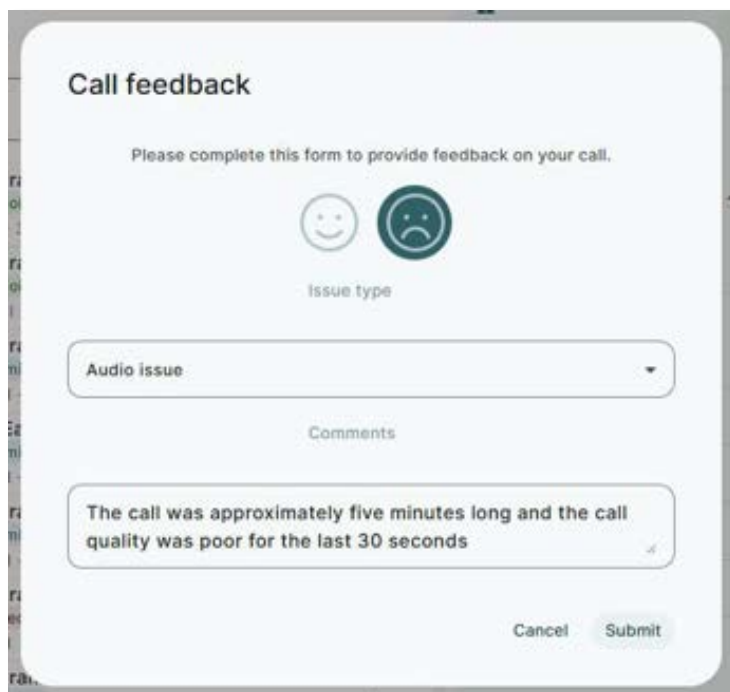
Please complete this form to provide feedback on your call.

Issue type

Audio issue
Call ended unexpectedly
Other

Cancel Submit

Enter a comment and click 'Submit'.



Call feedback

Please complete this form to provide feedback on your call.

Issue type

Audio issue

Comments

The call was approximately five minutes long and the call quality was poor for the last 30 seconds

Cancel Submit

Please also contact and inform your support team, so they're able to follow-up with progress of the investigation on your behalf.

CRM Integration

Customer Relationship Management systems, also known as CRMs, are business IT systems that aim to help organisations improve their performance, productivity and customer relationships. They do this by enabling users and managers to easily track customer interactions and automate different business processes.

They also provide tools to facilitate reporting on various business criteria and easily track factors like employee efficiency, sales pipelines and financial performance.

Any given CRM system will contain a database of contacts relevant to the industry or sector the organisation works within. Typically, the database will include customers, suppliers or students and their personal information like address, job title, email address and telephone number.

ERP (Enterprise Resource Planning) and MIS (Management Information System) are other examples of business IT systems that typically contain a database of contacts. In this section we will refer to any of the above as CRM providers. If you are a School or Education establishment, please refer to the [Schools & Education Addendum](#).

CRM and Evonex Connect

In essence, integration between Evonex Connect and a given CRM allows access to the CRM's database of contacts within Evonex Connect.

The integration itself makes use of the CRM provider's API (Application Programming Interface) to allow bi-directional communication between Evonex Connect and the provider. Integration is primarily designed to facilitate telephony interactions with the contacts in the CRM database. These interactions can include:

- Making telephone calls directly from the CRM (Click-to-dial)
- Automatically displaying the CRM contact page when they call you, or you call them (Screen-pop)
- Searching for CRM contacts directly within Evonex Connect (Contact search)
- Displaying the CRM contact page after searching for the CRM contact in Evonex Connect (Screen-pop from contacts)
- Displaying the CRM contact page for a call (missed, incoming or outgoing) that has already happened (Screen-pop from call history)
- Displaying the CRM contact page for a voicemail message left by a caller (Screen-pop from voicemail)
- (Education specific) Court Order notifications for incoming and outgoing calls, and from contacts, call history and voicemail
- (Education specific) Safeguarding incident reporting for incoming and outgoing calls, and from call history (not missed) and voicemail.

As of October 2025, Evonex Connect integrates with the following CRM providers. There are varying interactions available, depending on the provider - the tables below detail the interactions available with each.

CRM Provider	General interactions - October 2025						
	Click-to-dial	Screen-pop for incoming calls	Screen-pop for outgoing calls	Screen-pop from contacts	Screen-pop from call history	Screen-pop from voicemail	Contact search
Arbor MIS	Yes	Yes	Yes	No	Yes	Yes	No
Bromcom MIS	Yes	Yes	Yes	Yes	Yes	Yes	Yes
CPOMS Safeguarding	Yes	N/A	N/A	N/A	N/A	N/A	N/A
Dynamics 365	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Freshdesk	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Generic URL	Yes	Yes	Yes	Yes	Yes	Yes	No
HubSpot	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Salesforce	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Workbooks	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Zendesk Support	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Zoho CRM	Yes	Yes	Yes	Yes	Yes	Yes	Yes

CRM Provider	Education-specific interactions - October 2025 (as per general interactions plus...)								
	Court order notifications...					Safeguarding incident reporting...			
	For incoming calls	For outgoing calls	From contacts	From call history	From voicemail	For incoming calls	For outgoing calls	From call history	From voicemail
Arbor MIS	Yes	Yes	No	Yes	Yes	N/A	N/A	N/A	N/A
Bromcom MIS	Yes	Yes	Yes	Yes	Yes	N/A	N/A	N/A	N/A
CPOMS Safeguarding	N/A	N/A	N/A	N/A	N/A	Yes	Yes	Yes	Yes

*For further information regarding education-specific features, please see the [Schools & Education Addendum](#).

Please note, providers and interactions will be expanded in due course.

CRM integrations are configured, enabled and disabled by your administrator. Multiple CRM providers may be configured concurrently; therefore, it is possible to see multiple contact matches from multiple CRMs when you receive an incoming call, make an outgoing call, search for a CRM contact, view a call history entry, or access a voicemail message.

The first 100 contacts from each of your configured CRM systems are cached and shown in alphabetical order in the Evonex Connect Contacts list pane by default. When you search for a contact by name or number, this triggers a query of the entire CRM database, and the relevant matches will be displayed.

The Windows or macOS desktop versions of Evonex Connect are required for Click-to-dial. Screen popping and Contact search are available in the Web browser, Windows and macOS versions of Evonex Connect.

Click-to-dial from your CRM (or any Website)

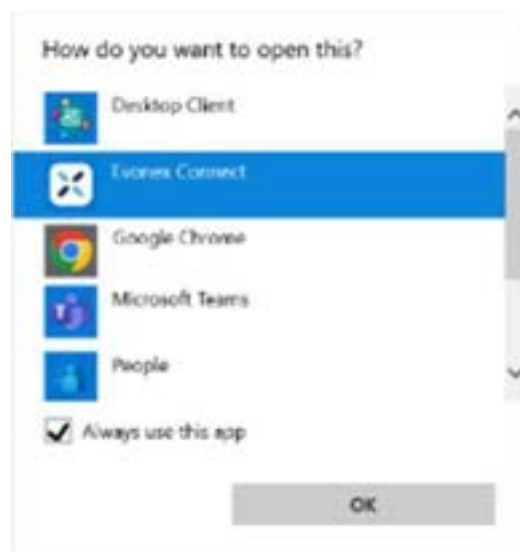
Using the Windows or macOS apps, you can make calls simply by clicking on a telephone number. To do this, it is necessary to register Evonex Connect in your computer's operating system as the default application for the TEL: protocol. This means that any number your computer recognises as formatted as a TEL: link becomes dialable through Evonex Connect. Typically, telephone numbers on websites and email footers, among others, are formatted as TEL: links.

Setup on a Windows computer

To set Evonex Connect as the default app for making telephone calls when you click on hyperlinked numbers, go to 'Settings > Miscellaneous > Call with Evonex when clicking hyperlinked numbers' and click the 'Set As Default' button.



You'll be presented with a dialogue window similar to the one below. Select 'Evonex Connect' from the list, tick the 'Always use this app' check box, then click 'OK'.



The Call with Evonex when clicking hyperlinks button will change to 'Registered' and become greyed out.

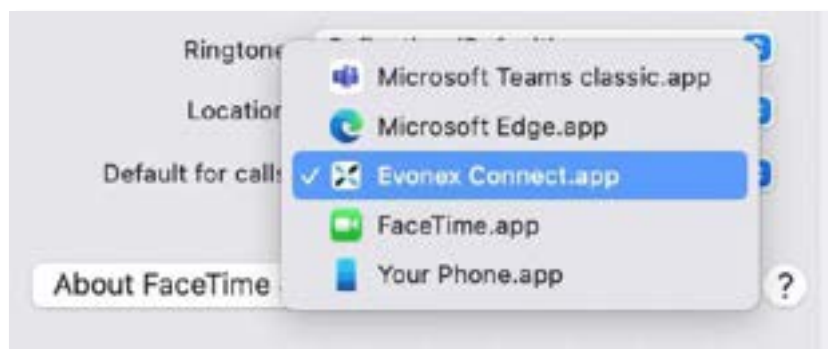
Call with Evonex when clicking hyperlinks

Registered

Setup on a macOS computer

When clicking on telephone number links on a Mac, FaceTime is the default application that is configured to call the clicked number. To make Evonex Connect the default calling app, follow these steps:

1. Open the "FaceTime" app.
2. From the application menu, click "FaceTime" and then choose "Preferences."
3. In the "Preferences" window, select the "Settings" tab.
4. Change the "Default for calls" option by using the dropdown list to select 'Evonex Connect'.
5. You can now close preferences and FaceTime.



Setting up the Browser Click-to-dial extension

Some websites or web-based CRMs will contain telephone numbers that are not formatted as TEL: links. To allow these numbers to be dialable via the Evonex Connect Windows or macOS apps, we have developed an 'extension' for the Chrome web browser. This extension aims to detect or identify any UK telephone number that is present on a webpage or web-based CRM and place an

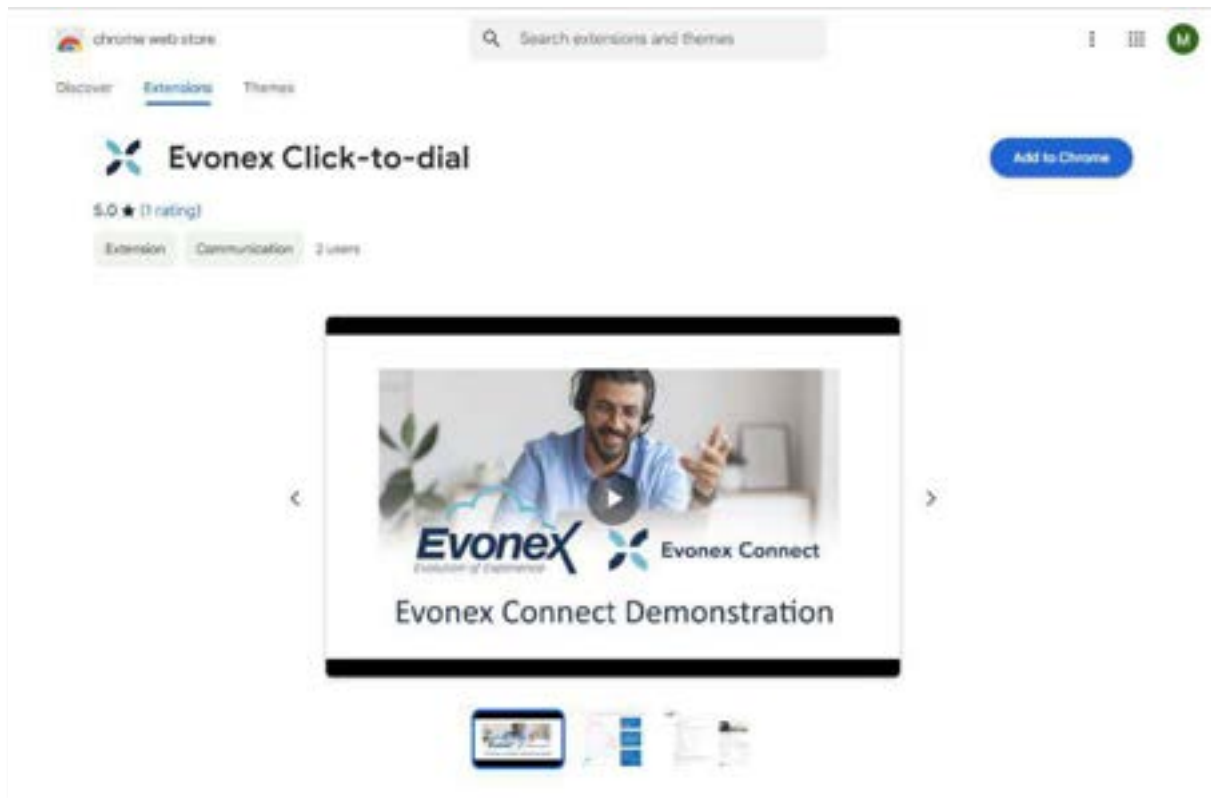
Evonex Connect logo  next to it. When you see the logo, you can click it to dial the identified telephone number.

The extension can be easily installed in your browser by opening Evonex Connect and navigating to 'Settings > Help > Evonex Connect Browser Extension' and clicking the 'Chrome' button.



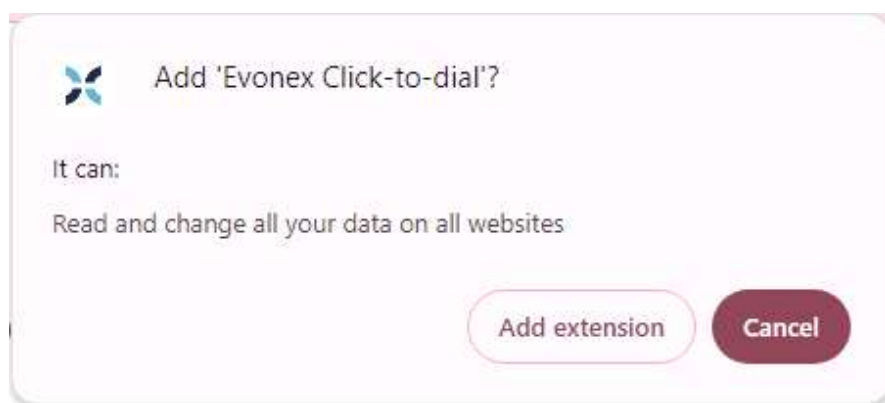
You may also click this direct link: [Evonex Click-to-dial](#).

After clicking the button/link, the extension's web store page will be shown. Click the 'Add to Chrome' button.

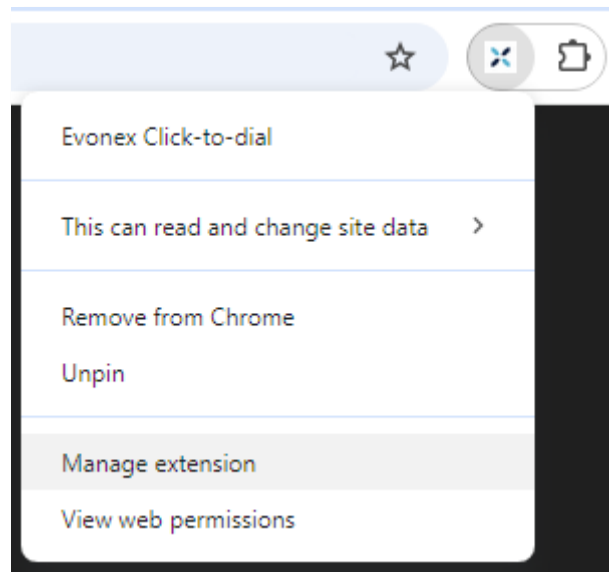


Confirm you're happy that the extension can read and change all your data on all websites by clicking 'Add extension'.

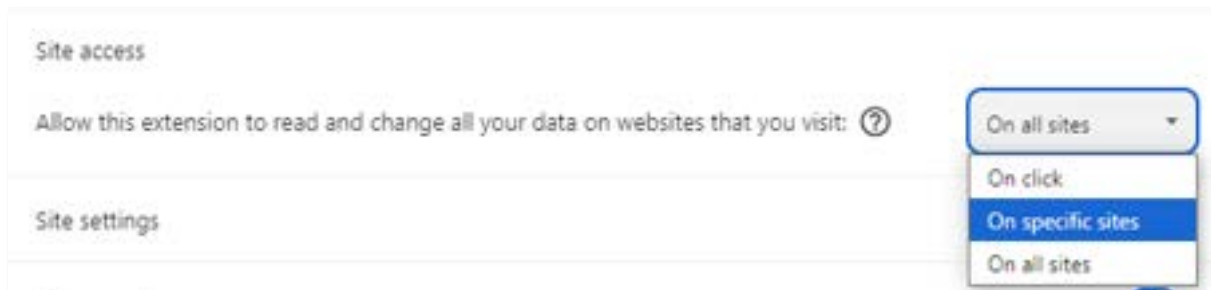
Please note, this is only for the purpose of identifying telephone numbers on websites you visit. We do not collect your browsing data.



If you wish to modify which websites the extension has access to, go to the 'Manage extension' menu option



Change the 'Allow this extension to read and change all your data on websites that you visit' setting to 'On specific sites'



Then add the website addresses that you wish the extension to have access to

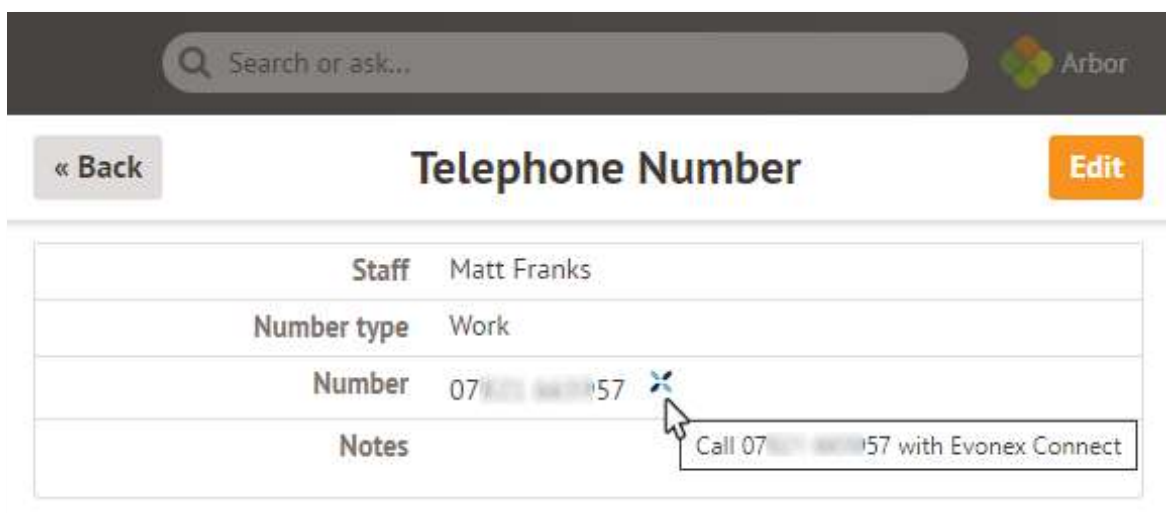


Using Click-to-dial

As previously mentioned, the click-to-dial feature requires either the Windows or macOS Evonex Connect app and allows you to make calls from within your CRM, or any website, with a simple click.

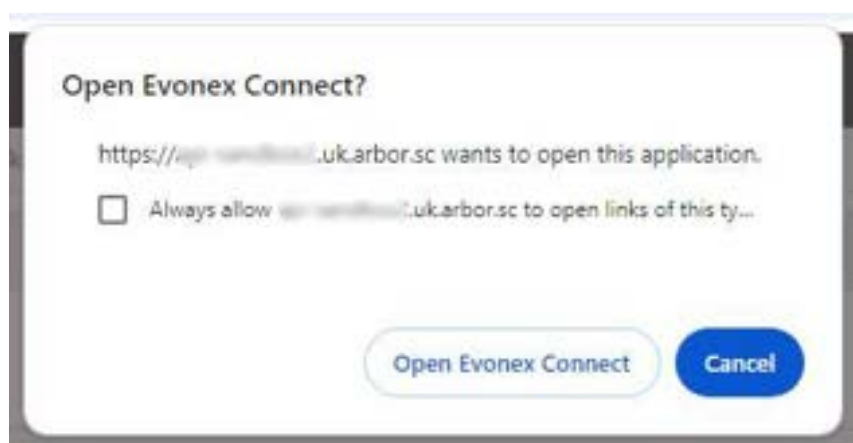
Different websites or CRMs will indicate that a number is dialable in different ways. For example, some may have specific 'call' buttons, while others may underline the telephone number and make it appear like a hyperlink.

For any UK telephone numbers that the Evonex Connect browser extension can identify, it places the Evonex Connect logo next to any telephone number which indicates that you can click it to make a call to the number. This includes those already formatted as TEL: links and those that may already have 'dial' buttons or are underlined.

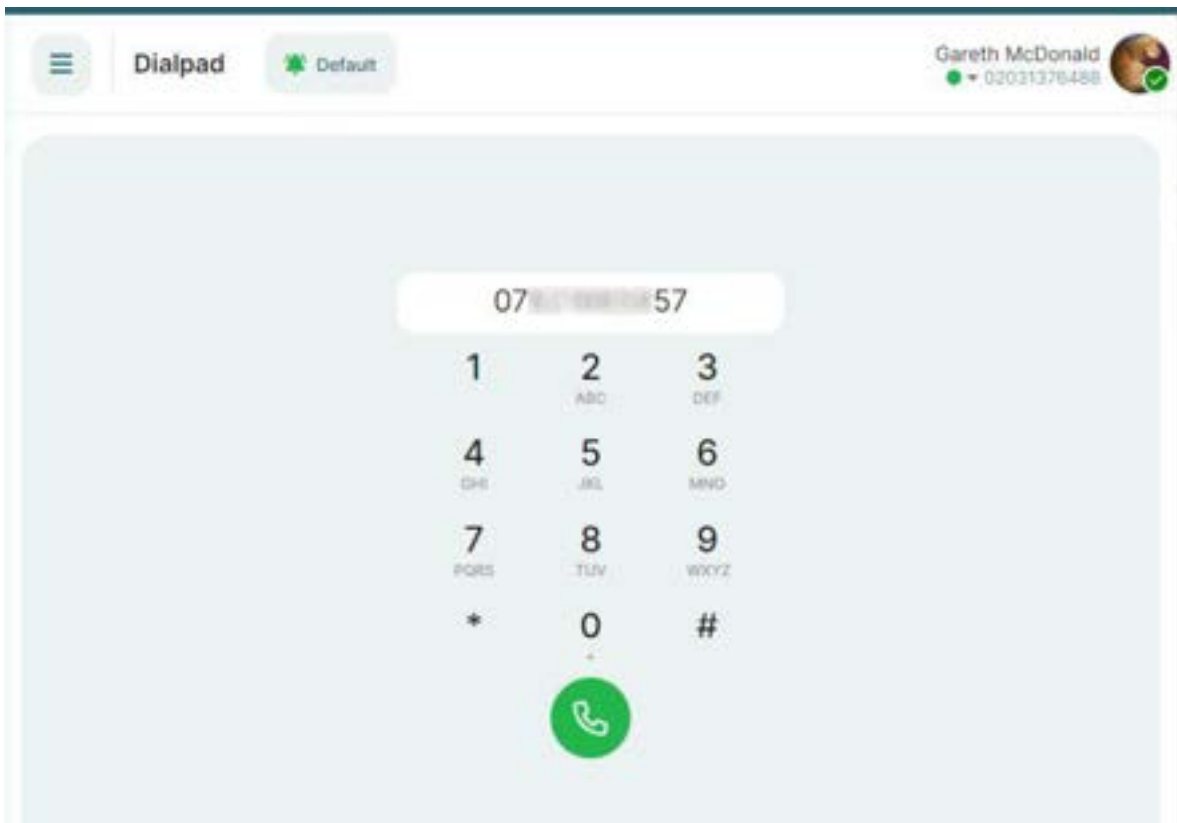


Example: Arbor, School MIS

When you click a telephone number in your CRM or a website, or click a 'dial' button, or click the Evonex Connect logo, a popup will ask you to allow Evonex Connect to be opened. Tick the 'Always allow...' checkbox to avoid repeatedly being asked for this CRM or website. Click 'Open Evonex Connect'.



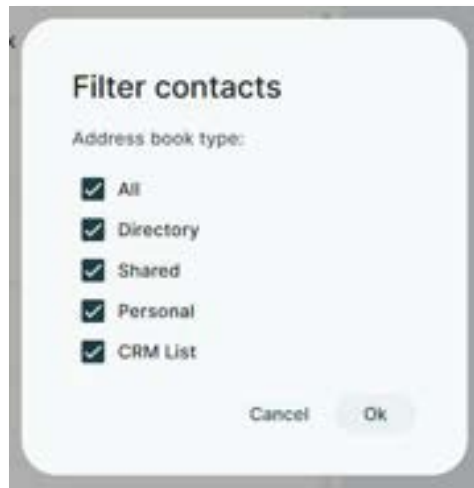
Evonex Connect will open or jump to the foreground and the telephone number you clicked will be added to the Dialpad. Click the green 'dial' button to make the call.



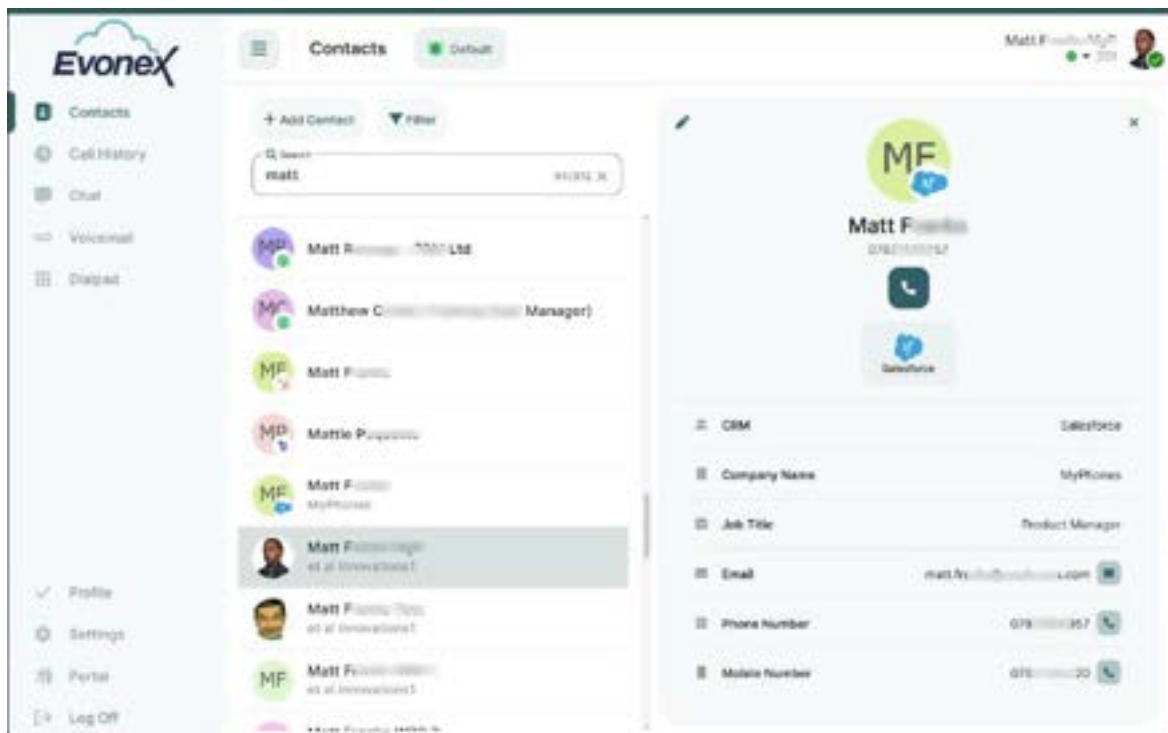
Search for contacts within your CRM

For more information on filtering within different Contact directories, please review [the Contacts section](#) of this manual.

Most CRM systems allow their databases to be searched from within Evonex Connect. For more details, see the [CRM and Evonex Connect](#) section. You may search by contact name, telephone number, company, email, etc, and return all matched results to the application. In the Contact menu, click the 'Filter' button and select either 'All' or 'CRM List' and click 'OK'



Enter your search criteria in the 'Search' field and the contacts contained within your CRM that match your search will be displayed.



Example of a contact search result returned from multiple CRMs and other directories

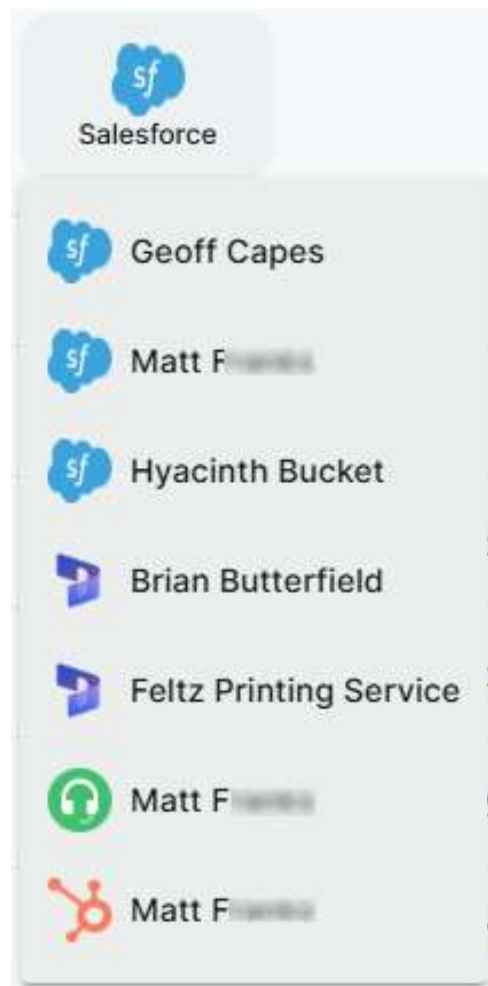
Select a contact from the context pane to view its details.

You may call the contact's main telephone number by clicking the  'call' button.

You may call one of the contact's other telephone numbers by clicking the  'call' button.

You may screen-pop the contact in the CRM by clicking the  'edit' button.

You may view other CRM contacts that match the same telephone number or are associated with the contact, by clicking the button labelled with your CRM. Each of the resulting contact names shown can be clicked to screen-pop that contact in the respective CRM:



Please note, there may be a short delay before the CRM button is displayed. This is due to the CRM provider's API, of which we have no control.

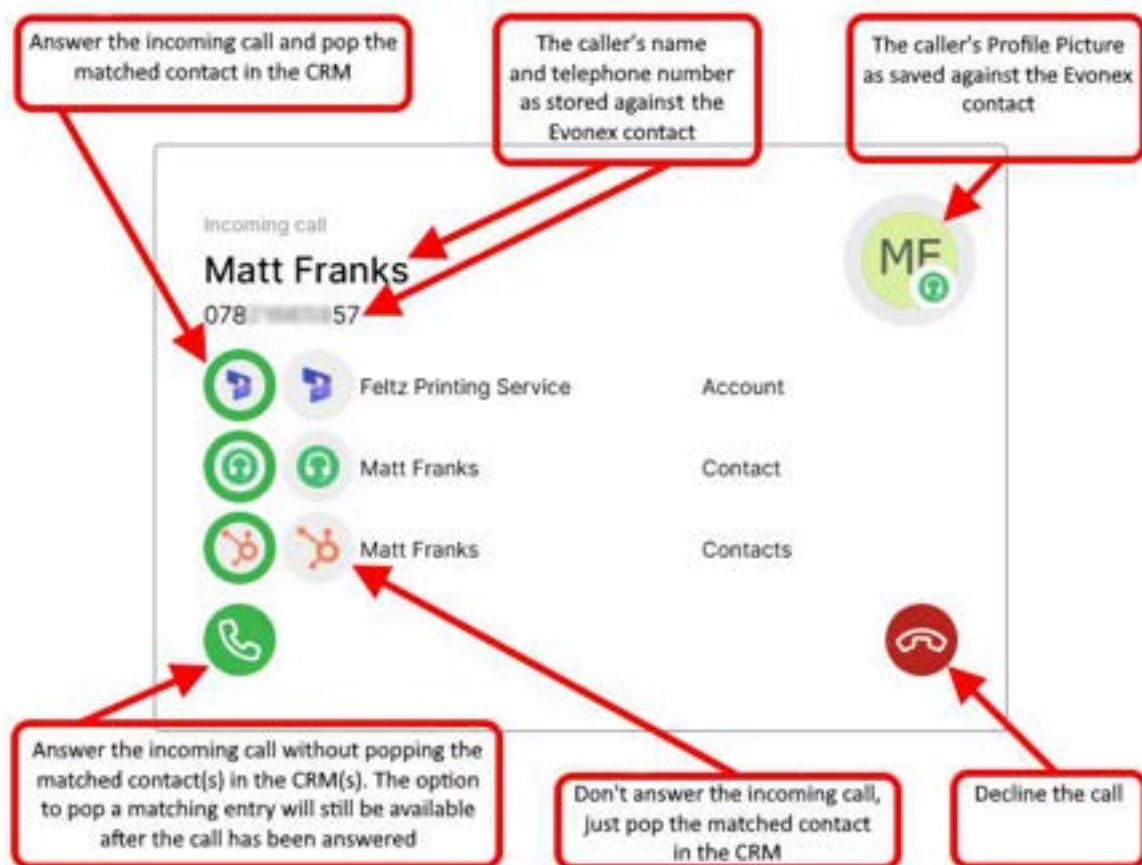
Screen-pop of your CRM

When you receive a call

When you receive an inbound call to your telephone number, and Evonex Connect is minimised or in the background, you will see a pop-up notification on-screen. Please review the [Receive a call section](#) for more details.

When you click on the notification and Evonex Connect is maximised on-screen, you will see the caller's number, as well as their name and profile picture if they have been saved as an Evonex contact. The green 'Answer' and red 'Reject' buttons are displayed as in the image below. Answering the call shows it as active (or connected) and brings the Call Control Pane into view – see the [When the call is connected section](#). Rejecting the call will send the caller to your Voicemail, by default.

You will also see the name and contact type of each matched entry in each of your configured CRMs. Next to them are a pair of buttons which contain the logo of the CRM that contact has been matched within. The left-hand button, with a green halo, will answer the call and pop the CRM contact. The right-hand button, without a halo, will just pop the CRM without answering the call.



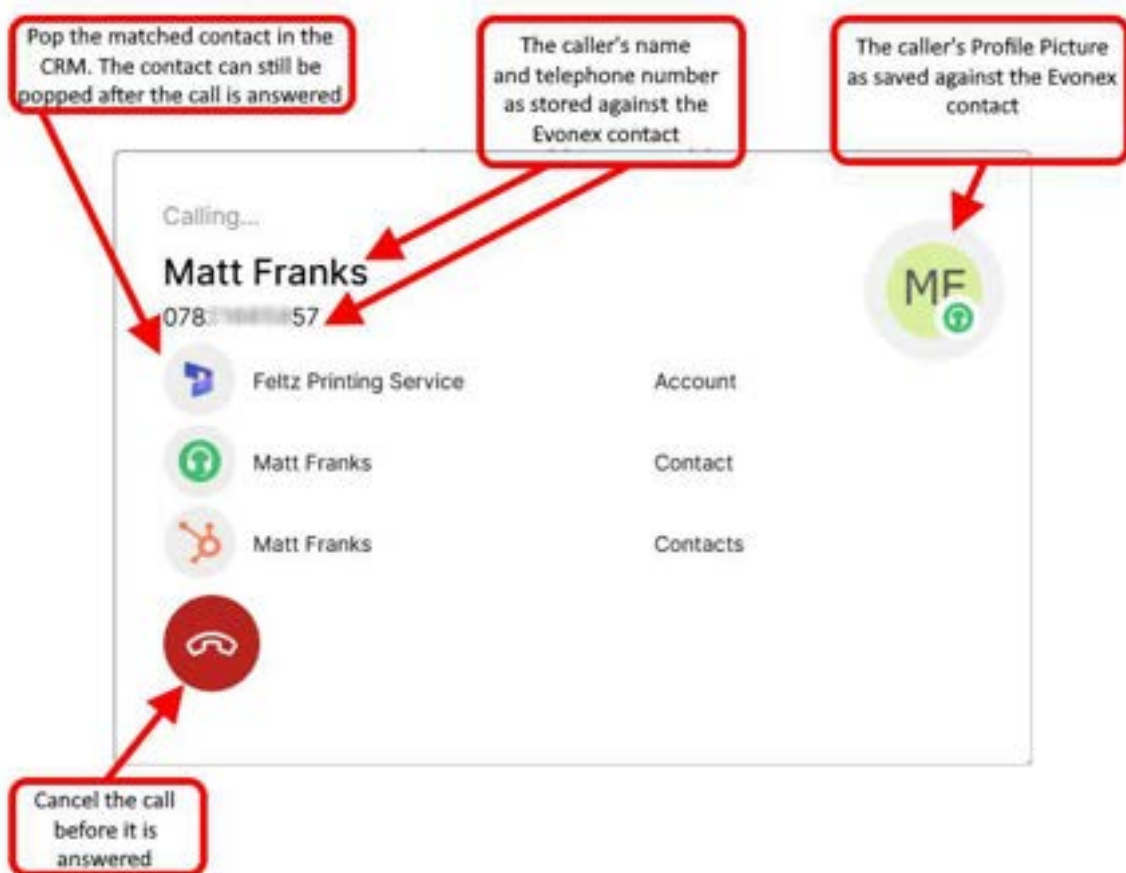
Please note, there may be a short delay before all matched results are displayed. This is due to the CRM provider's API, of which we have no control.

When you make a call

When you make an outbound call you will see the dialled number, as well as their name and profile picture if they have been saved as an Evonex contact. The red 'Cancel' button is displayed as in the image below – click it to stop making this outbound call.

You will also see the name and contact type of each matched entry in each of your configured CRMs. Next to them is a button which contains the logo of the CRM that contact has been matched within. Click this button to pop the contact in the CRM before it has been answered (while it is still ringing).

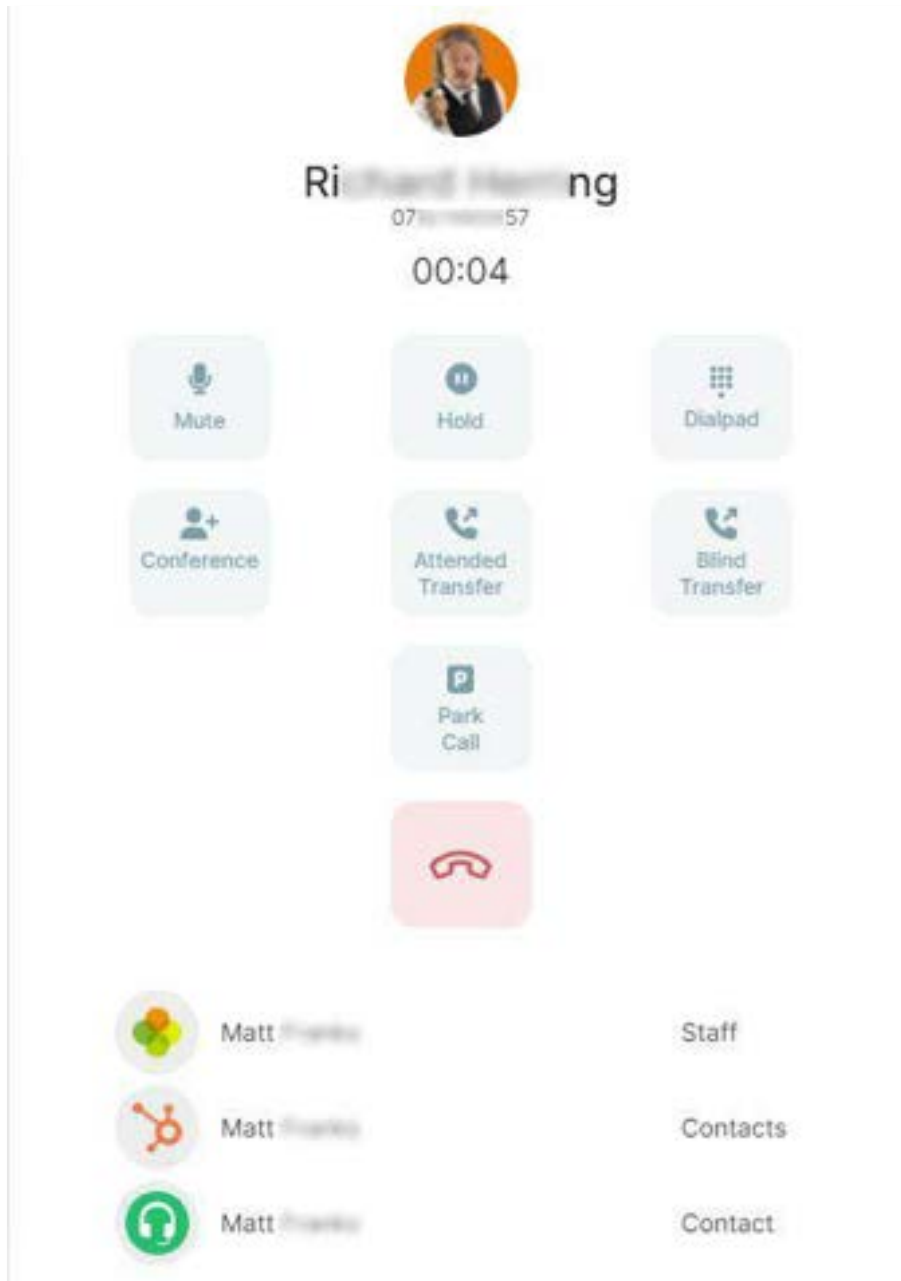
When the call has been answered, the call shows as active (or connected) and brings the Call Control Pane into view – see the [When the call is connected section](#).



Please note, there may be a short delay before all matched results are displayed. This is due to the CRM provider's API, of which we have no control.

When the call is connected

When your call is connected, the Call Control Pane appears. The Call Control Pane allows you to perform such tasks as hold, transfer and park the call. For more details, please refer to the [Call Control Pane](#) section.

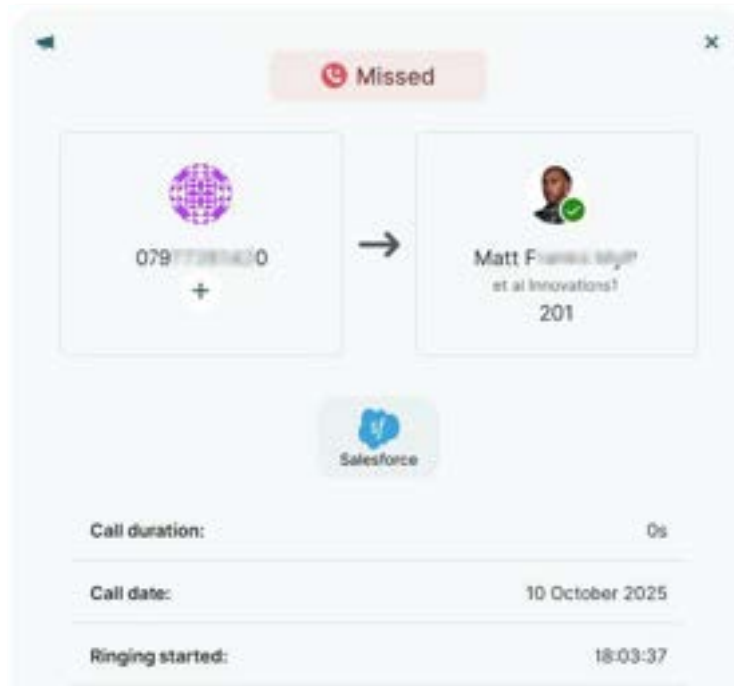


Below the call control buttons, you will also see a button for each contact match in each CRM you have configured. Each button contains the logo of the CRM that contact has been matched within. Click the button to pop the contact in the CRM.

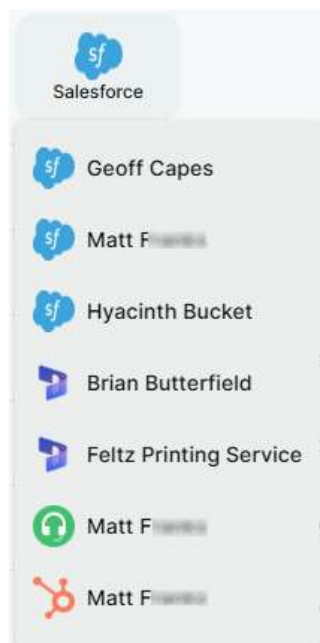
Please note, there may be a short delay before all matched results are displayed. This is due to the CRM provider's API, of which we have no control.

From Call History

You may screen-pop a CRM contact based on your incoming, outgoing and missed call history entries. Select an entry in the Call History list to view the detail of the call. For more information, please see the [Call History](#) section.



Click the button labelled with your CRM. Multiple contacts may be shown depending on the CRMs which your admin has configured for you. Each of the resulting contact names shown can be clicked to screen-pop that contact in the respective CRM



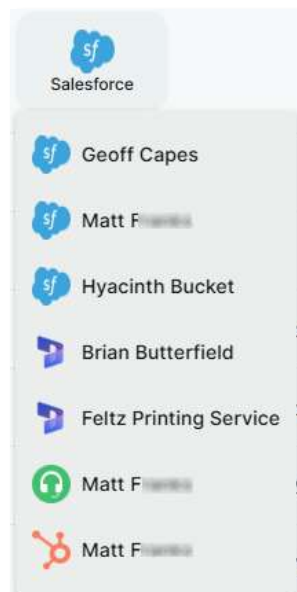
Please note, there may be a short delay before the CRM button is displayed. This is due to the CRM provider's API, of which we have no control.

From Voicemail

You may screen-pop a CRM contact based on your voicemail messages. Select an entry in the Voicemail list to view the detail of the message. For more details, please see the [Voicemail](#) section.



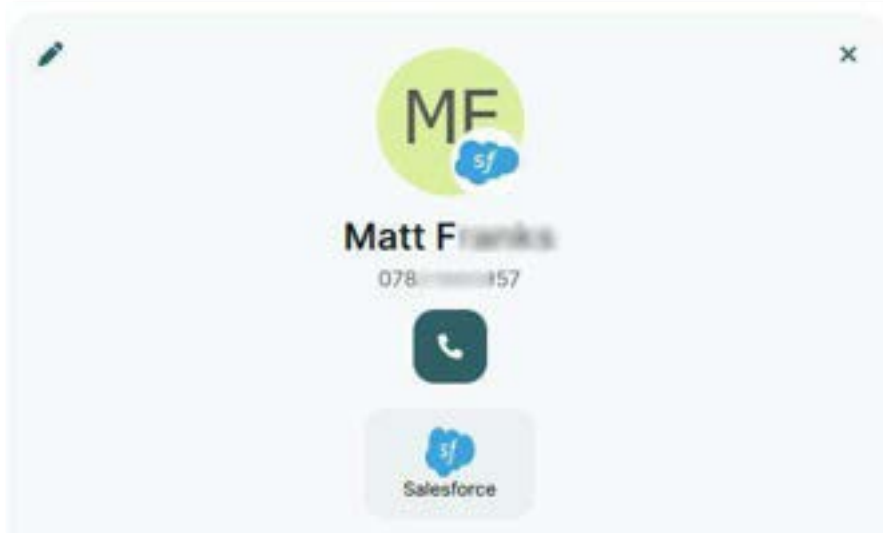
Click the button labelled with your CRM. Multiple contacts may be shown depending on the CRMs which your admin has configured for you. Each of the resulting contact names shown can be clicked to screen-pop that contact in the respective CRM



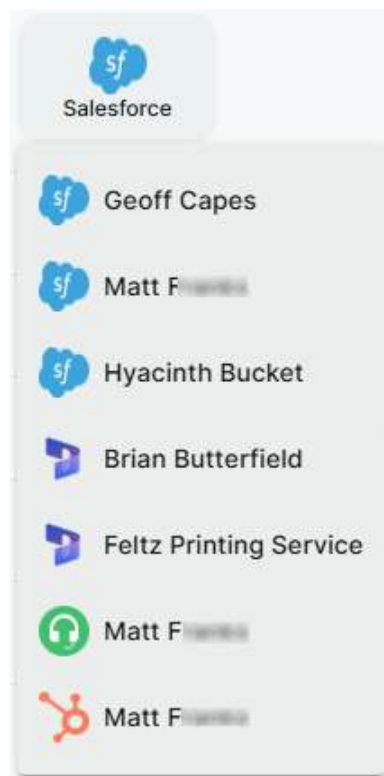
Please note, there may be a short delay before the CRM button is displayed. This is due to the CRM provider's API, of which we have no control.

From Contacts

You may screen-pop a CRM contact directly from the Contacts detail pane. Search for a contact then Select an entry in the Contact list to view its details. For more details, please see the [Contacts](#) section.



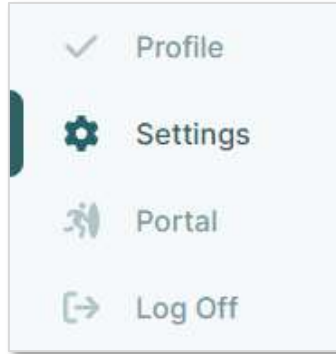
Click the button labelled with your CRM. Multiple contacts may be shown depending on the CRMs which your admin has configured for you. Each of the resulting contact names shown can be clicked to screen-pop that contact in the respective CRM.



Please note, there may be a short delay before the CRM button is displayed. This is due to the CRM provider's API, of which we have no control.

Settings

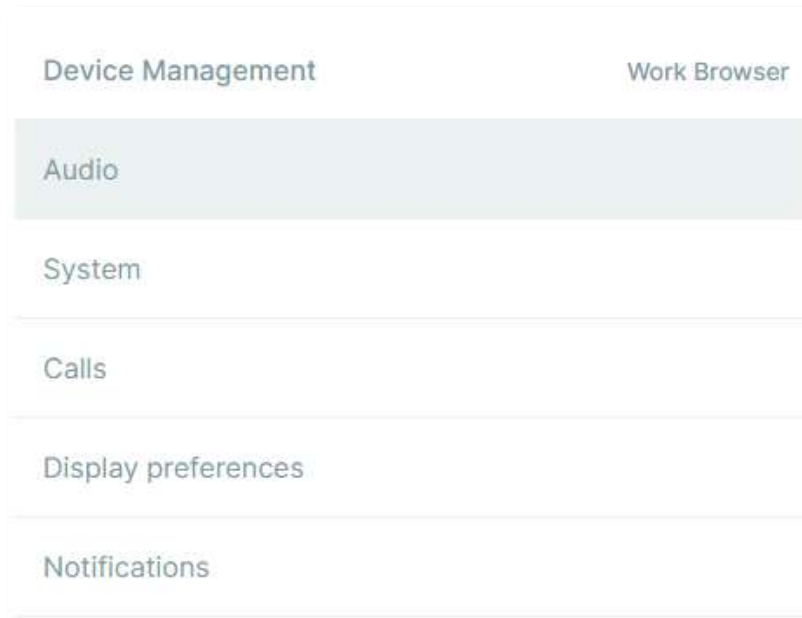
The Settings option from the bottom left of the Menu Pane allows you to change how Evonex Connect behaves.



Some settings are synchronised to your other Evonex Connect devices, while others are unique to each Evonex Connect device. There also some settings and diagnostic information that could be useful to your technical support team if you report a problem to them.

When a setting is changed, it is updated straight away, and a green tick  will appear to confirm the setting is saved.

Settings are sorted into the following sections: Device Management, Audio, System, Calls, Display Preferences and Notifications. Click on each section to view the relevant settings.



On the next page is a list of all Settings in the order laid out in the Settings menu. Images included for clarity. For a further explanation of each setting, please use the links below:

- [Device Management](#)
- [Audio](#)
 - [Microphone selection](#)
 - [Headphone/Speaker selection](#)
 - [Secondary ringer selection](#)
 - [Ring tone](#)
 - [Dialpad key tones](#)
 - [Ring/Chat Notification volume](#)
 - [Second ringer volume](#)
 - [In-Call volume](#)
- [System](#)
 - [Auto-start application](#)
 - [Send logs to server](#)
 - [Clear cache](#)
 - [App Version](#)
 - [Release Notes](#)
- [Calls](#)
 - [Call with Evonex When clicking hyperlinks](#)
 - [Call waiting](#)
 - [Recent Call IDs](#)
- [Display Preferences](#)
 - [Dialpad additional features initial state](#)
 - [Default directory filter](#)
 - [Contact list order](#)
 - [Show blocked contacts](#)
 - [Clock display preference](#)
 - [Theme](#)
 - [Dark/Light Mode](#)
- [Notifications](#)
 - [Chat notification popup](#)
 - [Chat notification sound](#)
 - [Call feedback popup](#)
- [Help](#)
 - [Support](#)
 - [Evonex Connect Browser Extension](#)
 - [Download Links](#)
 - [Sign in on mobile with QR Code](#)

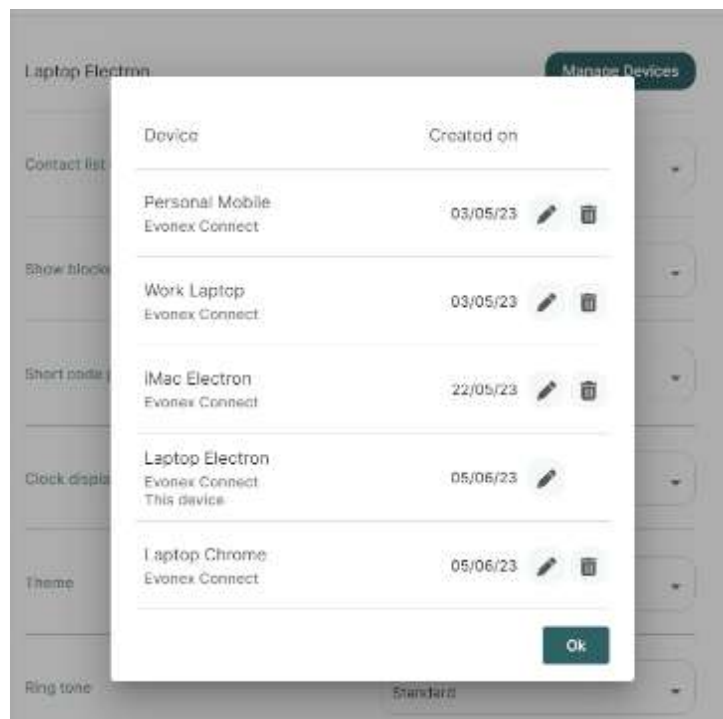
Device Management

Device Management

Work Browser

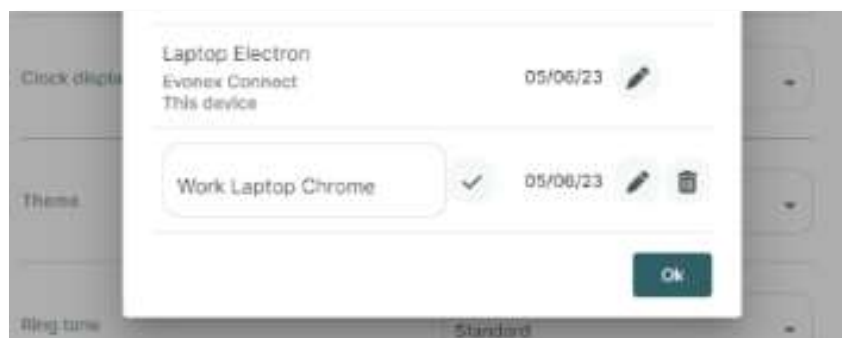
Click 'Device Management' to quickly and easily view the devices that you have previously given access to Evonex Connect. Each one can be identified by the friendly name you gave to it the first time you logged in on that device. The name of this device is shown to the left of the button – 'Windows app' in this example. If you don't recognise a device, you may delete it from here by

clicking the  trash button next to the device. You may also wish to delete a device to allow a log in from another device if you already have five concurrent logins.



Note that you cannot delete the device you are currently logged in on. You may also not delete any desk phones that have been assigned to you. If you wish to perform this function, please contact your Support Team.

You may also rename any device to update its friendly name. Press the  Edit button, type a new friendly name and press the Tick button. Click Ok to save.



Audio

Microphone selection

Microphone selection	Default - Microphone (Realtek(R) Aud... ▼
----------------------	---

Select the microphone you wish Evonex Connect to use for phone calls. This will typically be the same device as used for the Headphone/Speaker. This is a per-device setting.

Headphone/Speaker selection

Headphone/Speaker selection	Default - Speakers/Headphones (Real... ▼
-----------------------------	--

Select the Headphone or Speaker you wish Evonex Connect to use for phone calls. Typically, this will be the same device as the Microphone. This is a per-device setting.

Secondary ringer selection

Secondary ringer selection	Speakers/Headphones (Realtek(R) Au... ▼
----------------------------	---

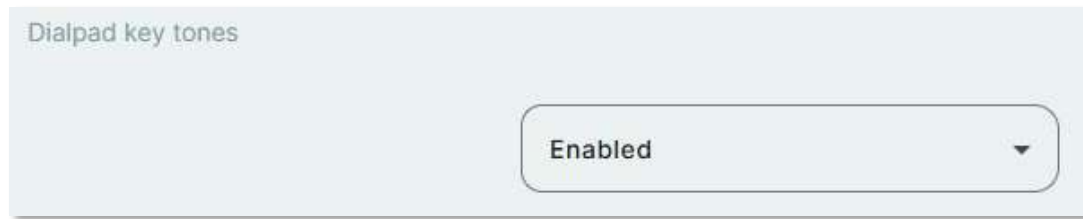
Select an additional audio device to play the ring tone. By default, the ringtone will only be played through the selected Headphone/Speaker device. If you select a device here, the ringtone will be played through this device as well as the selected Headphone/Speaker device. This is a per-device setting.

Ring tone

Ring tone	Trim phone 1 ▼
-----------	----------------

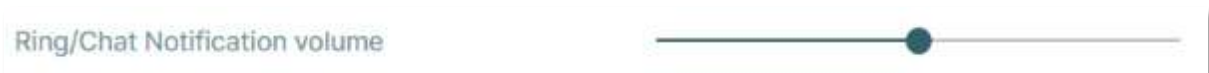
Choose from 12 Ring tones. The ring tone is played through your default audio device when your phone is ringing. This setting is synchronised to your other Evonex Connect devices.

Dialpad key tones



Enable (default) or disable the tones heard when you press numbers on the dialpad.

Ring/Chat Notification volume



Adjust the slider to increase or decrease the volume of the ringtone or chat notifications. This is a per-device setting.

Second ringer volume



Adjust the slider to increase or decrease the volume of the ringtone through the secondary ringer audio device. This is a per-device setting.

In-Call volume



Adjust the slider to increase or decrease the volume of the call through your Headset/Speaker device. This is a per-device setting.

System

Auto-start application (Windows and macOS apps only)



Choose whether you would like Evonex Connect to start automatically when you log in to your computer or if you would rather start it manually. This is a per-device setting.

Send logs to server

Send logs to server

Start Logging

Occasionally, if you're having difficulty with Evonex Connect, your Support Team may ask you to send them some log files. This is simply done by clicking the 'Start Logging' button, perform the task you're having difficulty with and then clicking the 'Send Logs' button.

Send logs to server

Compiling logs..

Send Logs

Clear cache

Clear cache

Clear

Occasionally, your Support Team may ask you to Clear the cache within Evonex Connect. Click this button to do so.

App Version

App Version

1.0.7

The current version of Evonex Connect running on your machine.

Release Notes

Release Notes

Show

Click the 'Show' button to read the release notes for the latest version of Evonex Connect. You can also navigate to the release notes for previous versions. Also included are links to our FAQs, Privacy Policy, Terms & Conditions and System requirements.



Calls

Call with Evonex when clicking hyperlinks (Windows and macOS apps only)

Call with Evonex when clicking hyperlinks

Set As Default

To set Evonex Connect as the default app for making telephone calls when you click on hyperlinked numbers, click the 'Set As Default' button.

You'll be presented with a dialogue window similar to the one below. Select 'Evonex Connect' from the list, tick the 'Always use this app' checkbox, then click 'OK'.



The Call with Evonex when clicking hyperlinks button will change to 'Registered' and become greyed out.

Call with Evonex when clicking hyperlinks

Registered

Call waiting

Call waiting

Disabled

Enable or disable the tone and visual indication of a call waiting to be answered while you are already on a call. When enabled, you have 20 seconds (default) to answer the waiting call. When disabled, the call will follow your call divert setting or route to your voicemail. This is a per-device setting.

Recent Call IDs

Recent Call IDs	32F6CB8-3C811EE-97CAB5D0-32BD61CA@46.231.71.231	@6:40:17 PM
	FA63CC92-3C711EE-97C8B5D0-32BD61CA@46.231.71.231	@6:40:14 PM
	32F6CB8-3C811EE-97CAB5D0-32BD61CA@46.231.71.231	@6:40:14 PM

The last three call IDs are listed here. Your support team may occasionally ask you to copy and send them one or more call IDs to help them diagnose any issues with Evonex Connect.

Display Preferences

Dialpad additional features initial state

Dialpad additional features initial state

Open ▼

Choose whether the Park Bays and Group Pick button are displayed on the Dialpad by default or if they are hidden. This is a per-device setting.

Default directory filters

Default directory filters

Directory, Shared, Personal, CRM ... ▼

☒ Directory

☒ Shared

☒ Personal

☒ CRM Contacts

Choose which contact directories you want to search within by default – Directory (internal), Shared (global, set by the admin), Personal (added by you), or CRM (any CRM contacts within providers your admin has configured for you). Select all checkboxes to search within a combination of all four. This setting is synchronised to your other Evonex Connect devices.

Contact list order

Contact list order

Alphabetical - First Name ▼

Change between sorting Contacts alphabetically by first or last name. This setting is synchronised to your other Evonex Connect devices.

Show blocked contacts

Show blocked contacts

Hide ▼

Choose whether to show or hide contacts that have been blocked. This setting is synchronised to your other Evonex Connect devices.

Clock display preference

Clock display preference

24 Hour ▼

Choose whether you'd like to see time stamps in 12-hour or 24-hour time format. This setting is synchronised to your other Evonex Connect devices.

Theme

Theme

Light Blue ▼

Choose from 13 colour schemes. This setting is synchronised to your other Evonex Connect devices.

Dark/Light Mode

Dark/Light Mode

Light ▼

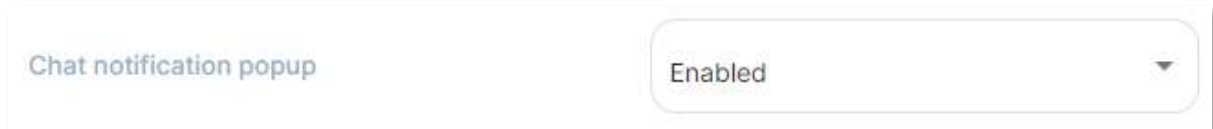
Dark/Light Mode

Dark ▼

Choose whether the app runs in Light mode (default) or Dark mode. This setting is synchronised to your other Evonex Connect devices.

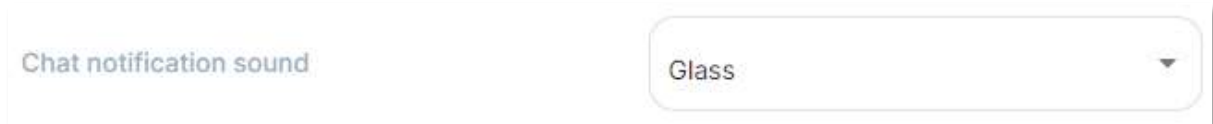
Notifications

Chat notification popup



Select whether to Enable or Disable the notification popup when you receive a new Chat message. This is a per-device setting.

Chat notification sound



Select from five notification sounds to play when you receive a new Chat message or turn off chat notification sounds (default). This setting is synchronised to your other Evonex Connect devices.

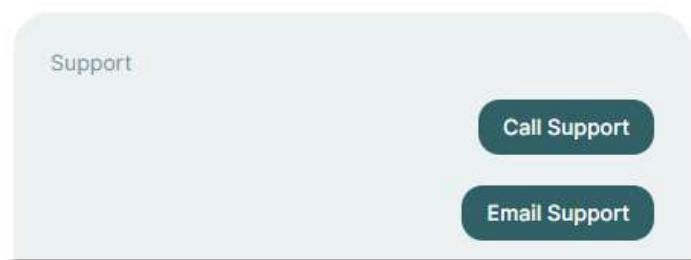
Call feedback popup



You may prevent the Call feedback banner from appearing at the end of each call by going to 'Settings' > 'Notifications' and change 'Call feedback popup' to 'Disabled'.

Help

Support



Handy buttons to facilitate contacting your provider's support team for technical assistance.

Evonex Connect Browser Extension



Install the Evonex Connect Browser Extension for Chrome to enable Click-to-dial.

Download Links



Quick access to QR codes to install the iOS or Android mobile apps or download links to install the Windows or macOS desktop apps.

Sign in on mobile with QR Code



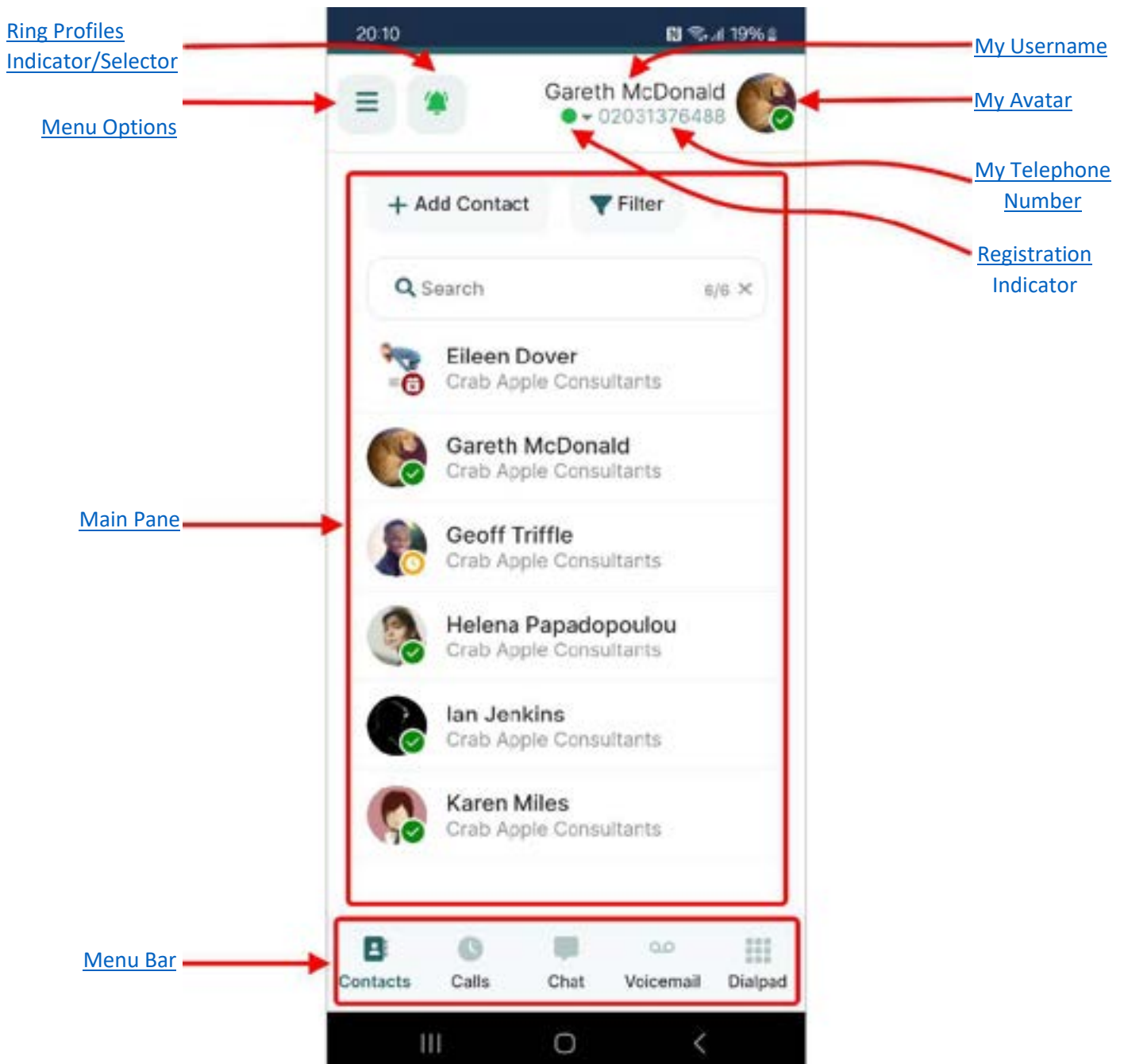
Click the 'Generate QR Code' button to display a QR on screen which can be scanned with the Evonex Connect mobile app to log you in.

Using Evonex Connect for iOS & Android.

Layout

To assist you in familiarising yourself with the layout of Evonex Connect for iOS and Android, we've provided an annotated diagram of the key points as viewed on your mobile device. Please use the links in the annotations to jump to a detailed description of each point.

The images in this section are generally applicable to both iOS and Android. Therefore, the images shown in this section are taken from both. Any differences between versions are highlighted where required.

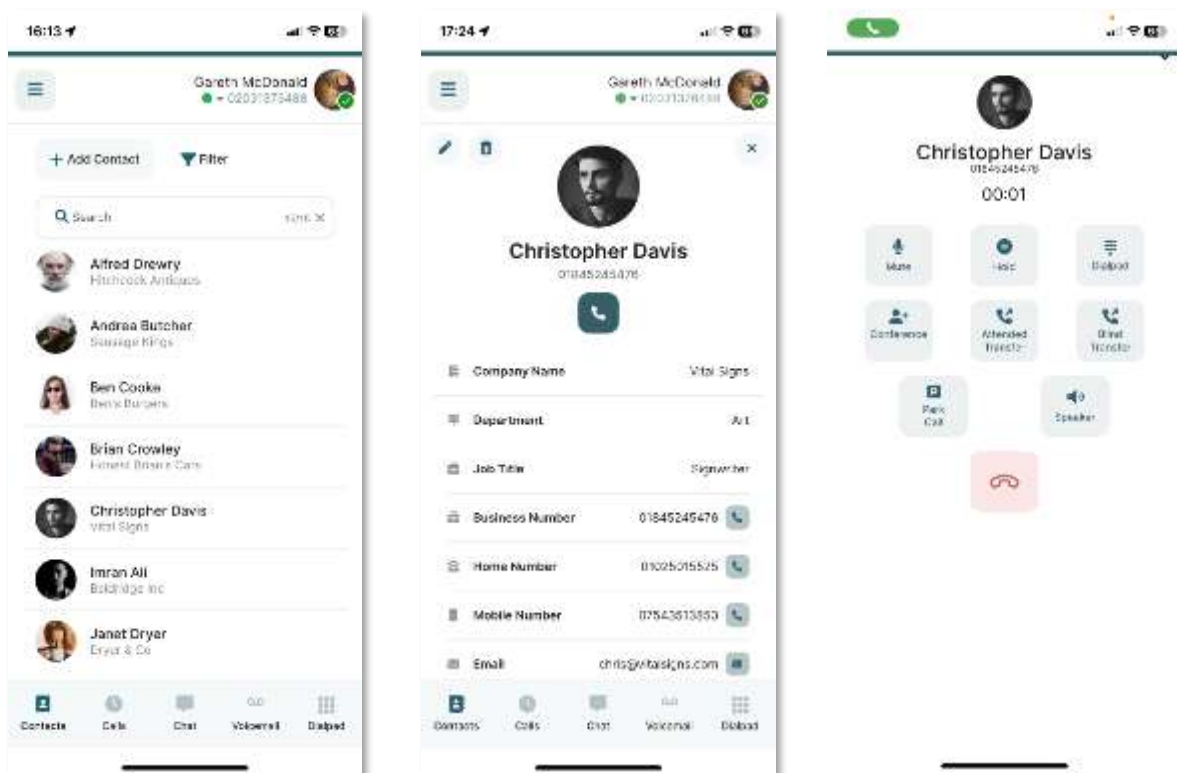


Design Responsiveness

As mentioned at the beginning of this document, Evonex Connect functions across many different environments and platforms. We've achieved this by writing a single, common codebase and using different frameworks to house that code in each environment. Therefore, we needed to ensure Evonex Connect could 'fit' in any potential screen size and ensure the 'Panels' resize appropriately as the application is resized on screen.

However, with a mobile device, due to the smaller screen size, it's impractical to show all information on one screen. Therefore, it is often better to have panes that consume as much screen space as possible, then transition between them as required.

Below are examples of how the layout of Evonex Connect changes as panes transition during the dialing of a contact.



The Contact menu item is selected as shown by the highlighted menu item. Scroll or use the Search field to find the contact you wish to call.

When a contact is selected, Christopher Davis in this case, the detail of the contact is shown in a transitioned pane.

When one of Christopher's telephone numbers is tapped, a call to the contact is made. Again, the app has transitioned panes, this time to the call control pane.

The only other real differences in layout between a desktop version and a mobile version is the 'Menu Bar' which is now across the bottom of the app, and the 'Menu Options' button which provides access to 'Profile', 'Settings' and 'Log Off'.

Menu Bar

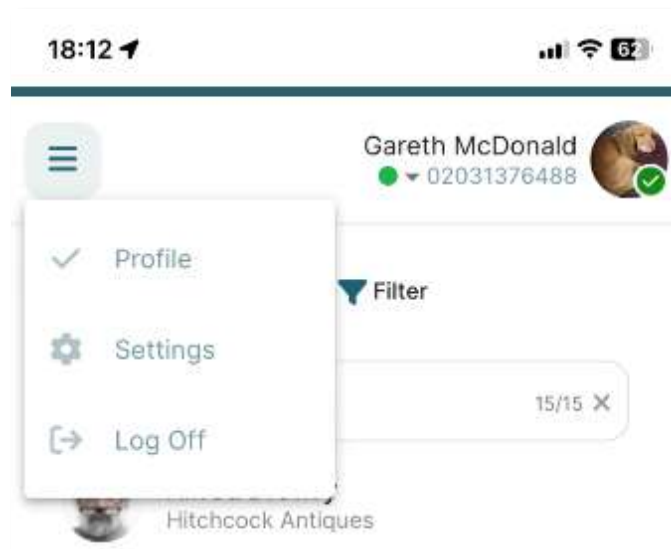
The Menu Bar is the area at the bottom of the screen that presents menu options which, when tapped, are displayed within the Main Pane in the middle of the screen.



Menu options consist of [Contacts](#), [Calls](#), [Chat](#), [Voicemail](#) and [Dialpad](#).

Menu Options

The [Profile](#), and [Settings](#) menu items are shown after tapping the 'Menu Options' button at the top left of the screen.



Details of these are covered in their own respective parts of this guide – please use the links to jump to each section.

The 'Log Off' button, also found in the 'Menu Options' section, can be used to ensure this device is not used when you are away from it or to stop a device from ringing.

Main Pane

The Main Pane is sensitive to the option selected in the Menu Bar. In other words, it displays information relevant to the item that has been selected. Consequently, due to the way the panes transition, it is also sensitive to the item selected within each Menu item and therefore displays the detail of each item selected in the previous pane.

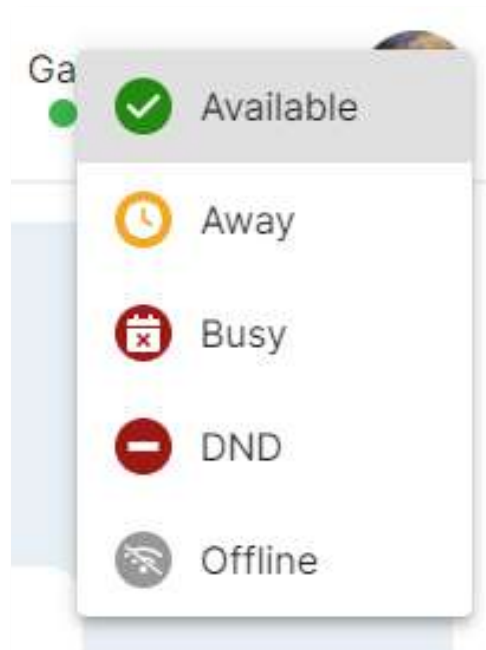
For example, selecting the Contacts option from the Menu Bar displays a list of Contacts in the Main Pane. Or, selecting the Call History option from the Menu Bar displays a list of Call History items in the Main Pane, etc.

The Main Pane also includes additional control options like the ability to perform an alphanumeric search in Contacts and Call History, filter different directories in Contacts and create new messages in Chat. You can also perform functions specific to each item in the list, for example call back a Call History entry or delete or play a Voicemail message.

In each instance, when selecting an item, the Main Pane transitions to the next or previous pane accordingly.

My Avatar

You may upload an image to your [Profile](#) to allow your colleagues to identify you more easily. The image can be in any commonly used image format such as .jpg, .png, .bmp, etc. The image is synchronised to all your Evonex Connect logins on any platform or operating system. Your presence is also displayed in the bottom right-hand corner of your Avatar. Tap the Avatar image to change your presence.



My User Name

The name of the user that is logged in to Evonex Connect.

My Telephone Number

This is the telephone number of the Universal License associated with your user. Depending on settings made by your administrator, you may see either your DDI or your extension number here. Callers can dial this number to reach you on any of your five registered and logged in devices (Ring Profile permitting).

By default, this is the number that is presented as the outbound caller ID when you make an external call, but your administrator can change this.



To change your outbound caller ID dynamically, tap on the drop-down arrow and select another number from the list of presentation numbers. The numbers that are available to select here are chosen by your administrator. When you change your presentation number on one of your Evonex Connect clients, this will synchronise to your other clients automatically. 'Caller ID:' will be displayed instead of your telephone number, until you select another number or select 'Default' which disables dynamic number presentation.

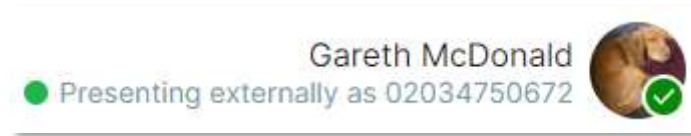


You may also select 'Withheld' to ensure calls are made not presenting any caller ID.



Your administrator can control the numbers you're able to present in this list and they may even choose a number other than your own as your default presentation number. In this case, when you select 'Default' from the drop-down list, 'Caller ID' will be shown rather than your DDI or extension number.

Lastly, your administrator may remove your ability to present any numbers other than one they specify; this is your default. In this case, there will not be a drop-down arrow and 'Caller ID:' will be permanently shown. You can still discover your own number by going to ['Profile > My Number'](#)



More details can be found in the [Number Presentation](#) section of this guide.

Registration Indicator

Usually this is a green circle which indicates your device is registered with the system and ready to take calls.



While your device is trying to register, the indicator will be orange.



Sometimes, this changes to a red circle which indicates registration has failed. This is normally because your cellular or WiFi connection is poor.



When the network connection returns, Evonex Connect will attempt to reconnect to the system and the indicator will turn green again.

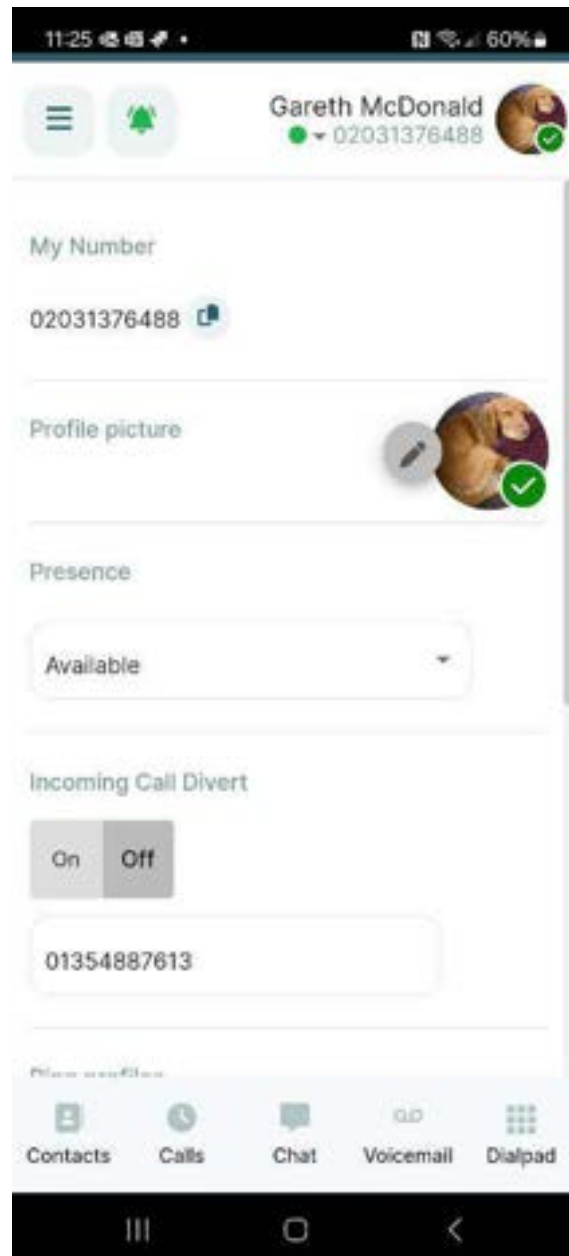
If Evonex Connect is unable to automatically restore its registration, a message will popup asking you if you wish to manually attempt to restore the connection. Click 'Reconnect' to retry or 'Dismiss' to ignore.



If you wish to force re-registration at any time, click the circle.

Profile

Selecting the Profile option from the 'Menu Options' button will take you to the Profile screen. From here you can perform such tasks as change your Profile Avatar picture, modify your Presence and toggle a call divert on/off, etc.



My Number

This simply allows you to view your telephone number and copy it to your clipboard. Click the copy button to do so.

Profile Picture

To change your Profile Avatar picture, tap the 'Edit' button to the left of the Avatar. You'll be presented with options allowing you to select an image from your Photo Library, Take a new photo or Choose an image from file. Select an option then select an image or take a new photo.



Image selection on iOS

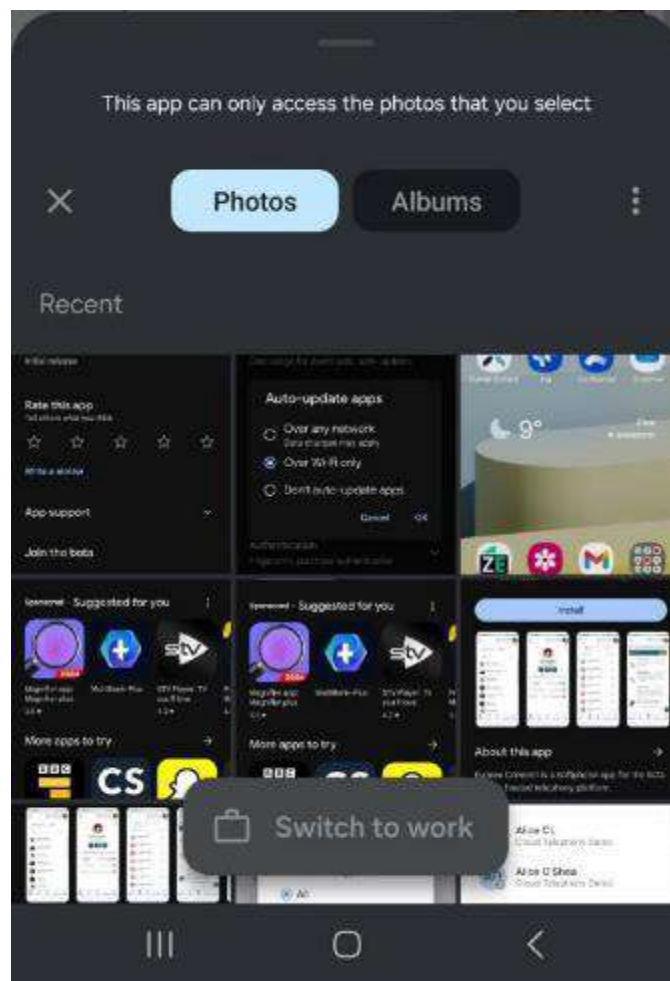
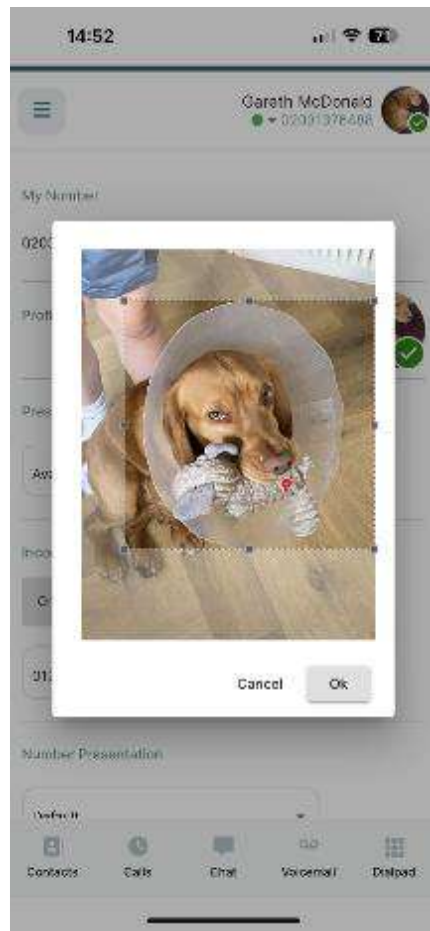
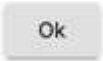
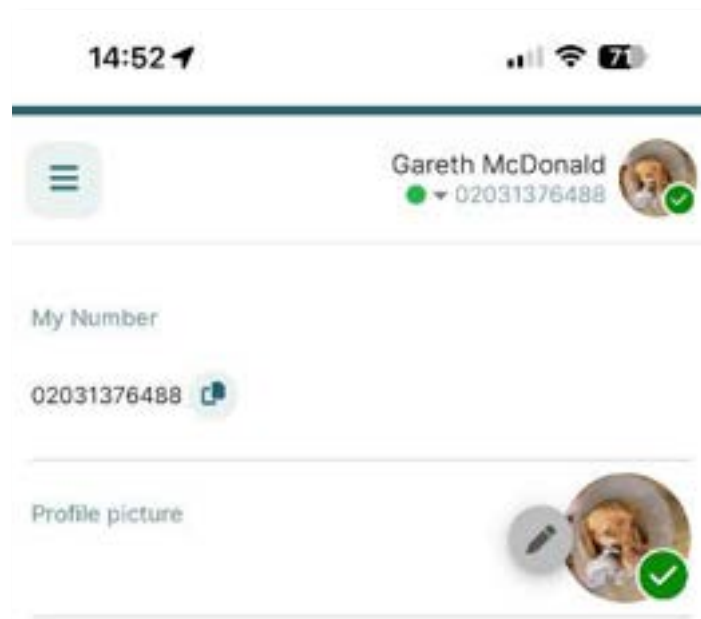


Image selection on Android

Next, you can select a portion of the image by moving the selection square and resizing it appropriately.

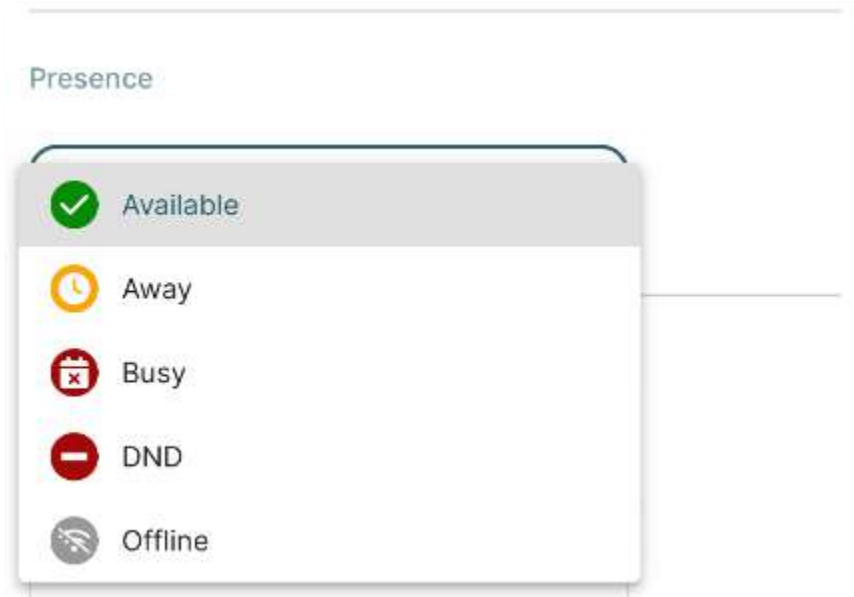


Tap  Ok and the portion of the image you have selected will be uploaded as the new Profile Avatar picture. This will also be reflected in the top right-hand corner of Evonex Connect.



Presence

There are six Presence states available, five of which can be manually selected by tapping the drop-down menu: 'Offline', 'Available', 'Away', 'Busy' and 'DND'. The 'Ringing' Presence state is updated dynamically. The 'Busy' Presence state can be updated dynamically or manually.



When a Presence state is selected, the Avatar is updated with the following badges in the bottom-right-hand corner.



The Presence states are designed to aid your colleagues when, for example, they have a call they wish to transfer to you – knowing you are 'Away' or 'Busy' saves time as it's unlikely you'll be able to take the call.

Your Presence is reflected on all Evonex Connect instances you are currently logged into so, no matter which device you're using, your colleagues will always see your Presence accurately.

The 'Ringing' Presence status also assists your colleagues in answering a call when it may be ringing at a phone that is unlikely to be answered. They can use the 'Group Pickup' button on the Dialpad screen to do this, which will be covered later in this manual.

Do Not Disturb

Setting your Presence to 'DND' (also known as Do Not Disturb) forwards your calls directly to voicemail. DND is synchronised to and reflected on any desk phones and other Evonex Connect devices you have on your Universal License.

Therefore, DND can be enabled or disabled on any of your devices, and it will update all your other devices automatically. Enabling or disabling DND also updates the 'Forward all Calls to Voicemail' setting within the portal, and vice versa.

When DND is enabled, your Avatar picture gains a 'No entry' badge and the words 'Diverting calls to Voicemail' are shown on all your Evonex Connect devices.



Incoming Call Divert

Use the 'Incoming Call Divert' feature to send calls destined for your number to an alternative number. This could be the number of one of your colleagues, or your mobile number, for example. Simply type the desired destination number (full or extension number) into the text field and use the 'On' and 'Off' toggle as desired. The destination number is saved until you wish to change it.

Incoming Call Divert

On

Off

01354887613

Your 'Incoming Call Divert' state is reflected on all Evonex Connect instances you are currently logged into so, no matter which device you're using, you will always be reminded of your call divert state accurately.



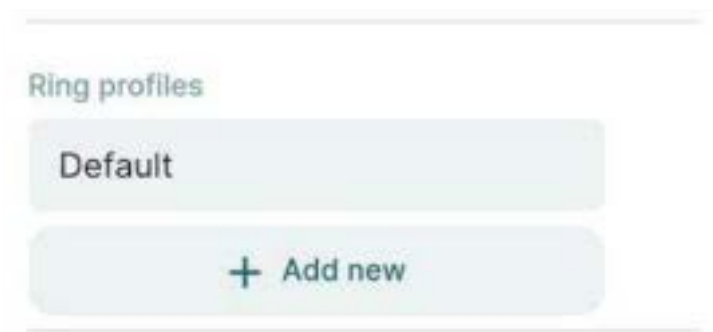
It is also synchronised to and reflected on any desk phones you have on your Universal License. Therefore, a divert can be enabled or disabled on any of your devices, and it will update all your other devices automatically. Enabling or disabling a divert also updates the 'Divert all calls unconditionally to another number' setting within the portal.

Ring Profiles

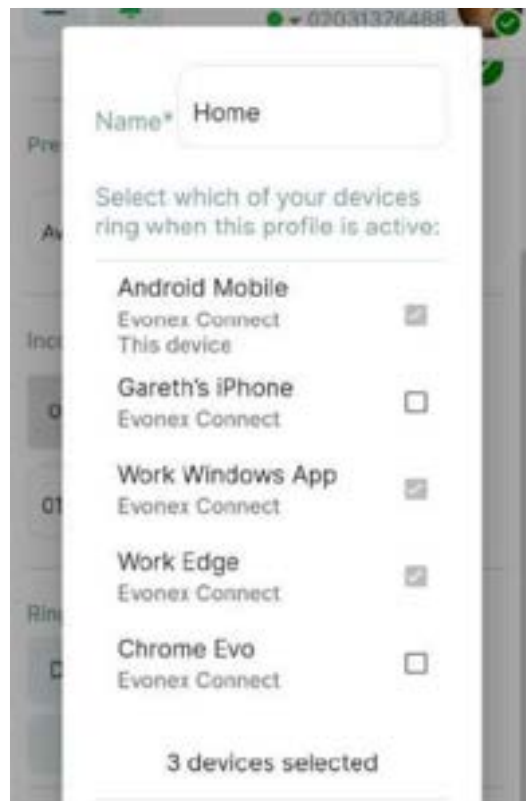
Ring Profile Administration

Ring profiles is a feature that allows you to decide which of your devices will ring for incoming calls. You may include different devices in different Ring Profiles and change the active Ring Profile as you require. For example, you're working from home, and you don't want your office desk phone to ring but your other devices should all ring. Or maybe you're focussing on an important document, and you don't want the distraction of Evonex Connect ringing on your desktop, so you only want the mobile app to ring.

There is a 'Default' ring profile which automatically contains all of your devices. When you receive a call, all of your devices will ring concurrently when the 'Default' Ring Profile is active. The Default Ring Profile cannot be edited.



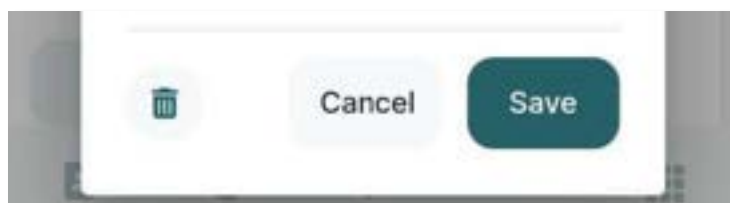
To create new Ring Profile, click the '+ Add new' button, give the Ring Profile a name, select the devices you want to be members of the Ring Profile by checking the box next to each device, and click Save. Any devices you do not include in the Ring Profile will not ring when this profile is active.



To edit a Ring Profile, click the 'pencil' edit button next to the Ring Profile name.

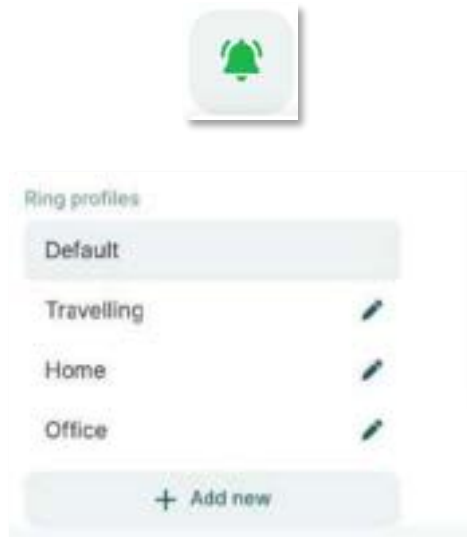


You may change the name of the Ring Profile, add device members to, or remove device members from the Ring Profile by checking/unchecking the boxes next to each device, as required. You may also click the 'trash can' delete button to remove the Ring Profile.



Ring Profile Activation

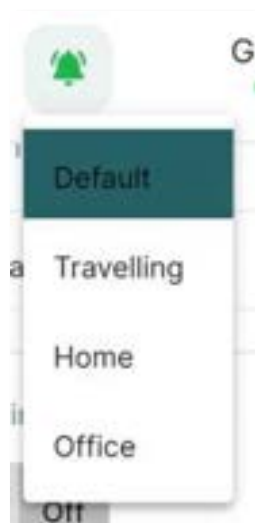
The Ring Profile indicator button is located at the top of Evonex Connect. The active Ring Profile is also shown highlighted in the Profile Menu.



This indicator will either be a green bell, which indicates this device is in the active Ring Profile and will ring for incoming calls, or a red bell which indicates this device is not in the active Ring Profile and will not ring for incoming calls.



Tap the Ring Profile indicator button to view a list of the available Ring Profiles and click one to activate it. The highlighted Ring Profile is the currently active one. The currently active Ring Profile synchronises across all your devices, and you may activate any Ring Profile from any device.



Ring Profiles - good to know

- Ring profiles are not designed to allow the routing of calls to other destinations – use Call Divert for that purpose or speak to your support team.
- Ring profiles are not visible to other users on your system, so you can't use them to indicate to others if you are away from your desk or in a meeting – use the DND, Away or Offline presence states for that purpose.
- Ring profiles are not time-based, once active a Ring Profile will remain active until you activate another ring profile.
- A device may be a member of more than one Ring Profile.
- Ring Profile names can be a maximum of 18 characters in length.
- You may create a maximum of five Ring Profiles plus the Default Ring Profile.
- If an active Ring Profile is deleted, the Default Ring Profile automatically becomes active.
- If a Device is deleted from your Universal subscription, it is automatically deleted from all Ring Profiles it was a member of. If it was the only member of a Ring Profile, the Ring Profile will also be deleted.
- If a new device is added to your Universal subscription, it is automatically added to the Default Ring Profile.
- You may activate, edit or delete any Ring Profile from any of your Evonex Connect devices.

Number Presentation

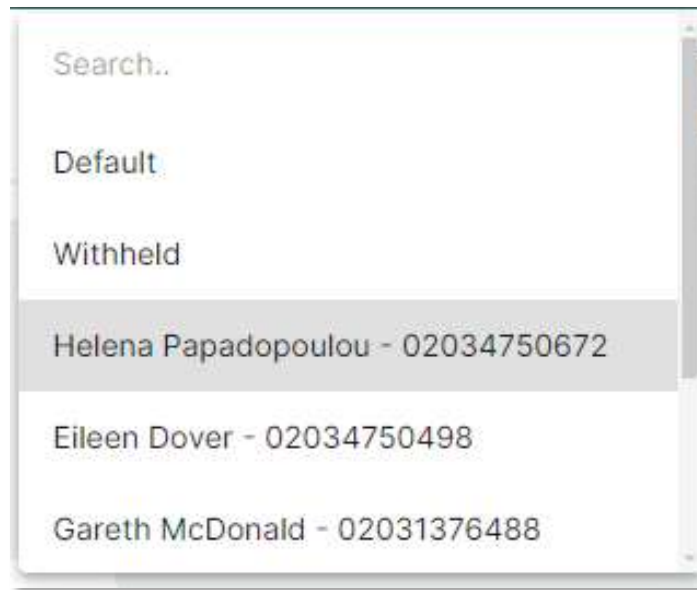
By default, the number that is presented as your outbound caller ID when you make an external call is 'Your Telephone Number' displayed in the top-right-hand corner of the screen.



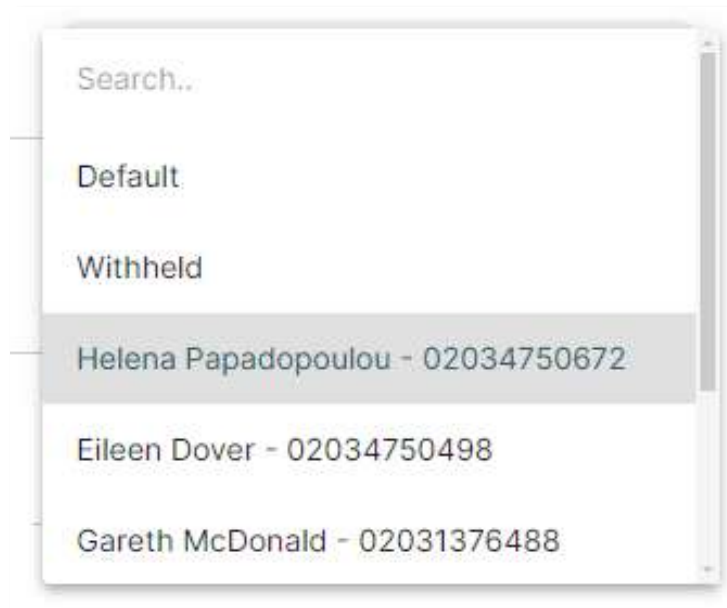
That is unless your administrator has specified another number for you to present. If so, you will see 'Caller ID:' in place of your DDI or extension number. Your administrator may allow you to present other numbers too – this is called dynamic number presentation. When you change your presentation number on one of your Evonex Connect clients, this will synchronise to your other clients automatically. To change your outbound caller ID dynamically tap the drop-down arrow.....



.....and select a number to present from the list.



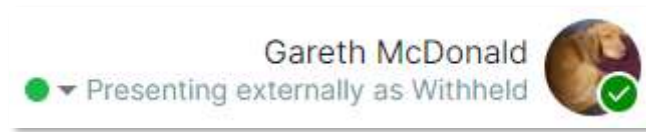
You may also use the corresponding 'Number Presentation' drop-down list under 'Profile'.



'Caller ID:' will be displayed instead of your telephone number until you select another presentation number or click 'Default' which disables dynamic number presentation.



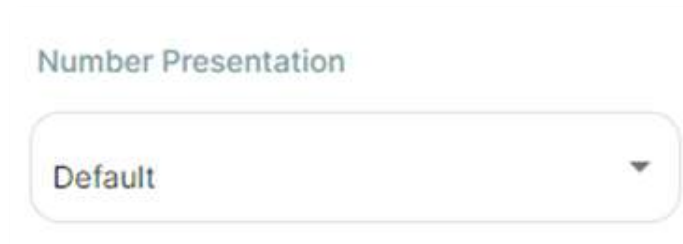
You may also select 'Withheld' to ensure calls are made not presenting any caller ID.



Your administrator may remove your ability to present any numbers other than one they specify; this will then be your default. In this case, there will not be a drop-down arrow and 'Caller ID:' will be permanently shown.



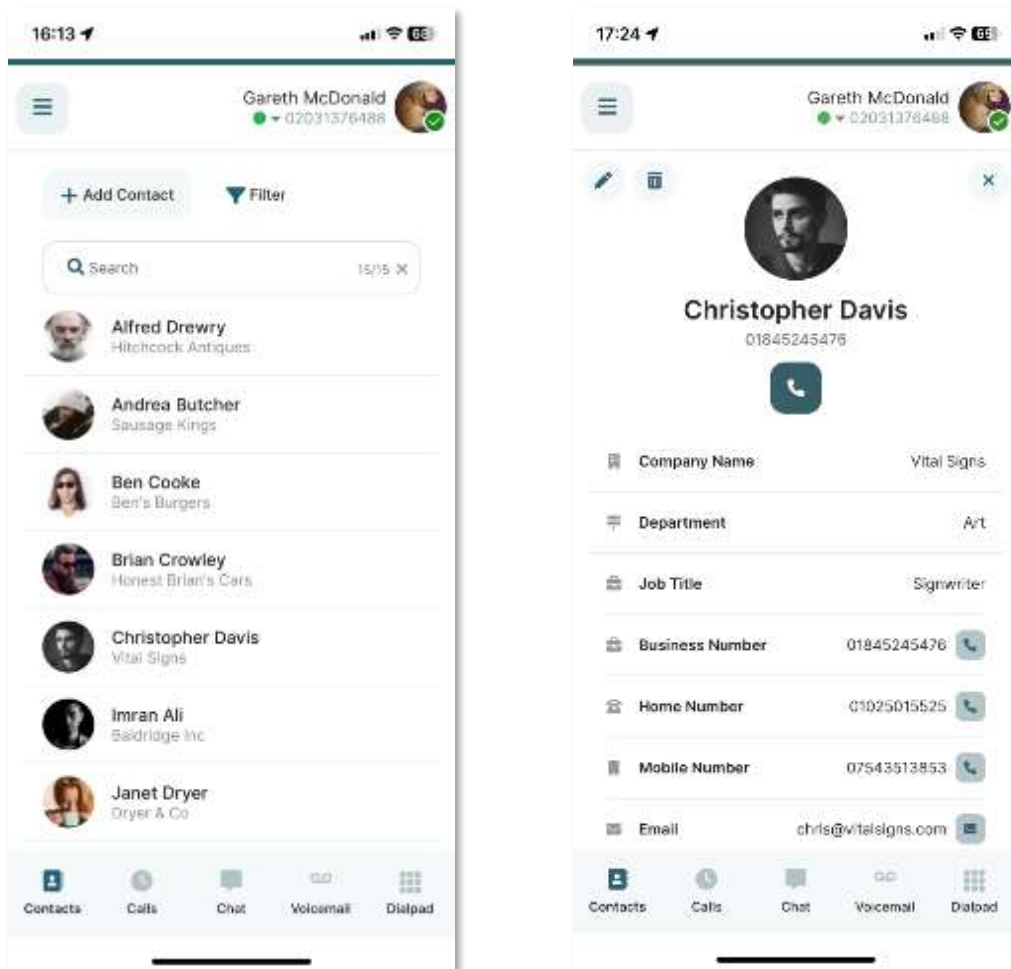
In the Number Presentation section of the Profile menu, 'Default' will be the only available option.



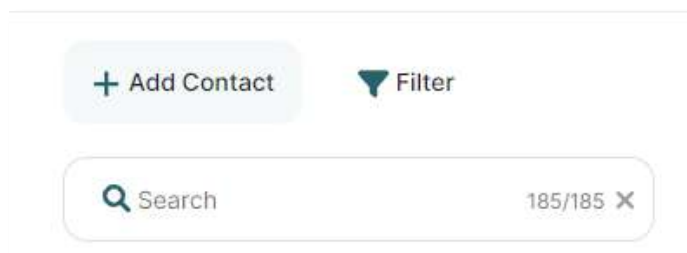
You can still discover your own number by going to ['Profile > My Number'](#)

Contacts

The Contacts section allows you find people you wish to call. It includes entries from the internal 'Directory', plus your 'Personal' address book and the 'Shared' Address book. Entries in the internal Directory will also include a Presence badge. Contacts saved on your mobile device are also searchable and can be dialled through the app.



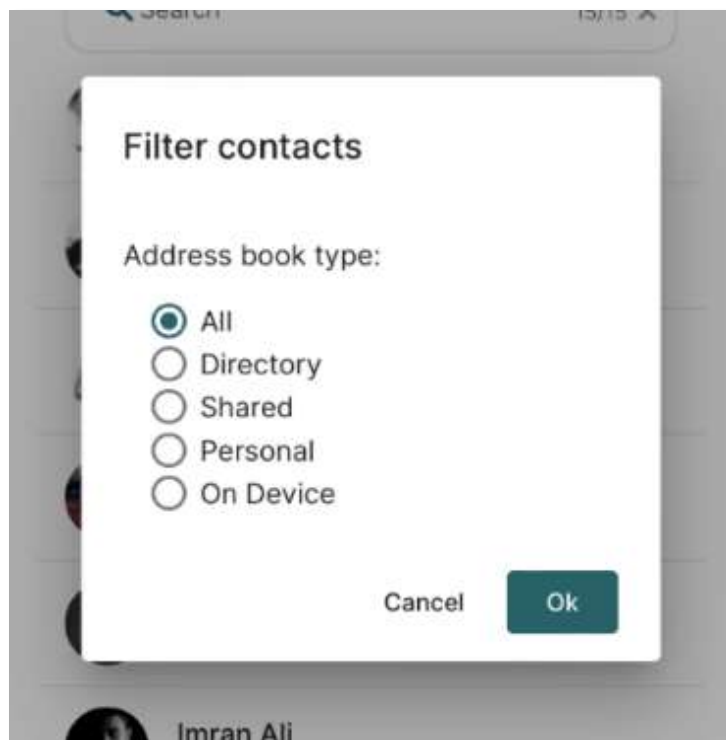
You may use the Search function to find the contact you wish to dial. The Search field supports alphanumeric characters, and you can therefore search for names, numbers, departments, companies, email addresses, etc.



You can use the filter option to include or exclude the Address Books your search is performed within, to return fewer or greater results. In 'Settings' you may choose the default directory filter option. The available Address Books are:

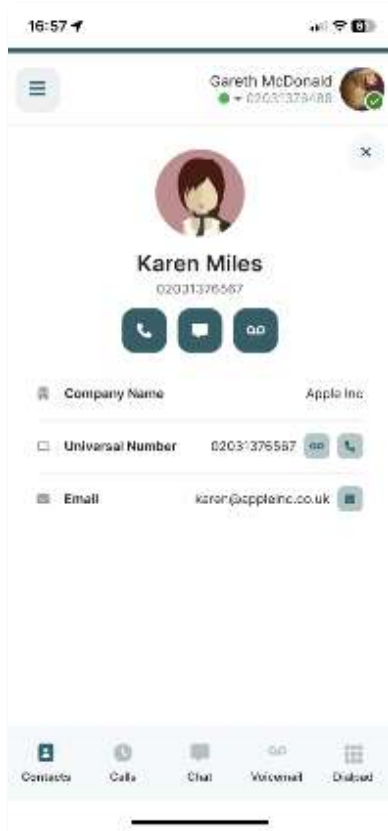
- 'Directory' which is the internal list of all users on the same account as you, including a presence badge.
- 'Shared' which is the global address book managed by your administrator.
- 'Personal' which is contacts added and only available to you.
- 'On Device' which are the contacts stored on your mobile device.

Selecting 'All' will show contacts from all directories.

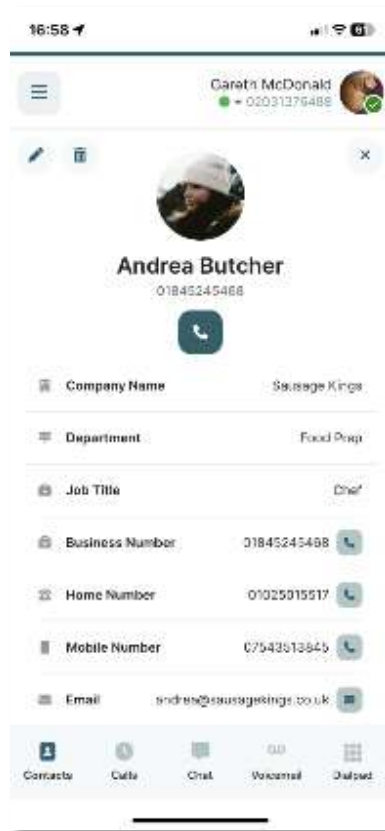


Once you've found the contact you wish to dial, tap it and the detail of the contact will be displayed. If the contact you have selected is from the internal Directory, you'll have the option of clicking the 'Dial', 'Chat' and 'Voicemail' buttons just below the Username and number.

If the contact you have selected is from the Personal, Shared or Device address books, you'll only have the option to 'Dial' the contact. If there is more than one telephone number associated with the contact, there will be individual 'Call' and 'Voicemail' buttons against each number.



Example of an internal directory contact

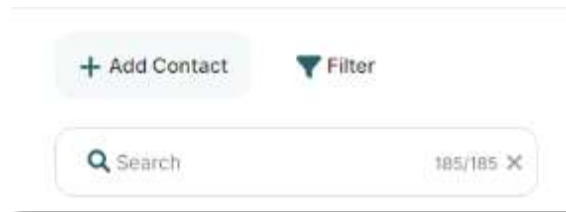


Example of an external shared contact

- Click the  button to call the contact's primary number.
- Click the  button to start a chat with this user.
- Click the  button to leave a voicemail message for this user's primary number without ringing their phone first.
- Click the  button to call one of this user's secondary numbers.
- Click the  button to leave a voicemail message for one this user's secondary numbers without ringing their phone first.
- Click the  button to send an email to this user's email address via your default email app.

Add a Personal contact

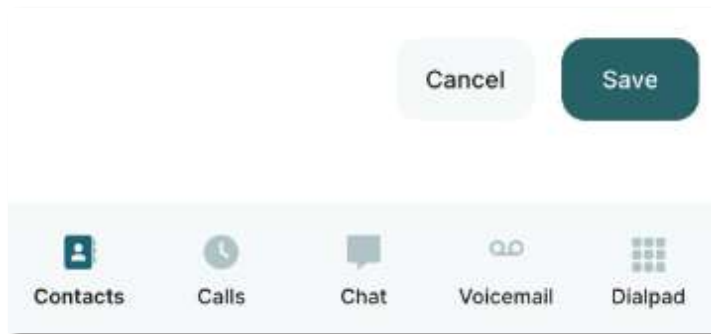
To add a new Personal contact, tap the 'Add Contact' button at the top of the Contacts pane.



You must enter the contact's first and last names and a telephone number as a minimum. You may also add other details such as company name, job title, department and email. You may also upload a profile Avatar picture for each contact.

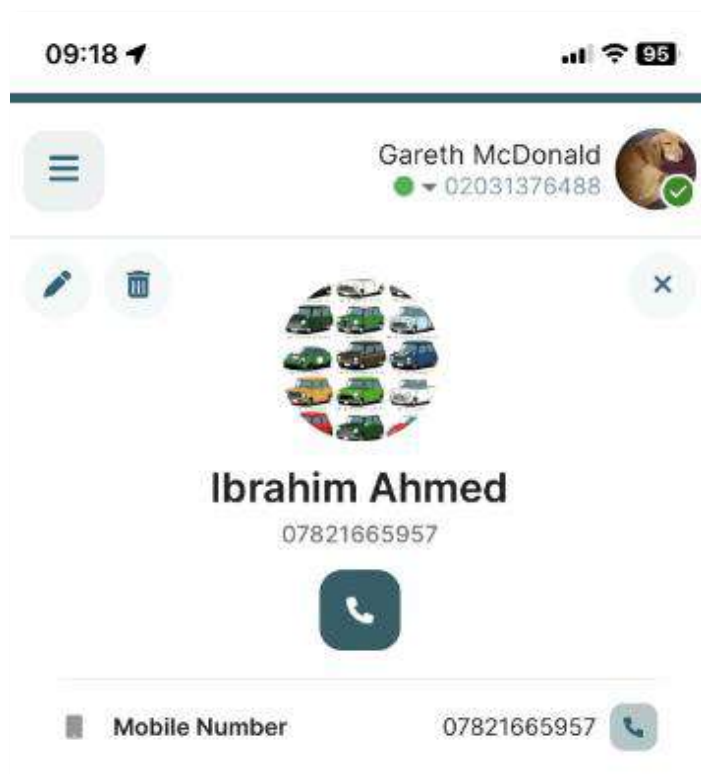


When you have populated the form with all the required details, tap the 'Save' button at the bottom of the screen.



Edit a Personal contact

To Edit or Delete a contact, tap the  Edit or  Delete buttons, at the top of the Contact detail pane, accordingly. If these buttons aren't available, you are trying to edit or delete a Shared contact - please contact your support team.



Make the required changes to the form.

09:18

Gareth McDonald
02031376468

Edit Contact

Upload Profile Picture

Address book type

Personal

First Name*

Ibrahim

Middle Name

Surname*

Ahmed

Contacts Calls Chat Voicemail Dialpad

When you have made the required changes, tap the 'Save' button at the bottom of the screen.

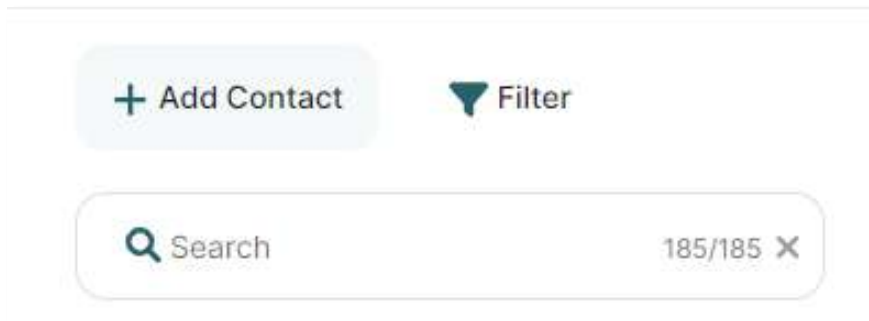
Cancel Save

Contacts Calls Chat Voicemail Dialpad

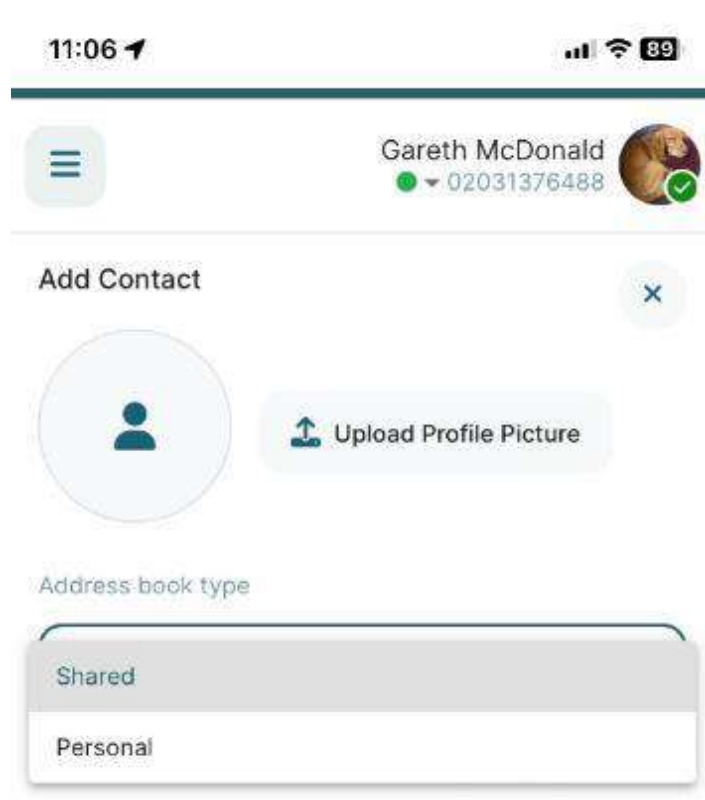
Add a Shared contact

Only an administrator can add Shared Address Book entries, through the app or via the Portal. If you do not have administrator privileges, please contact your support team.

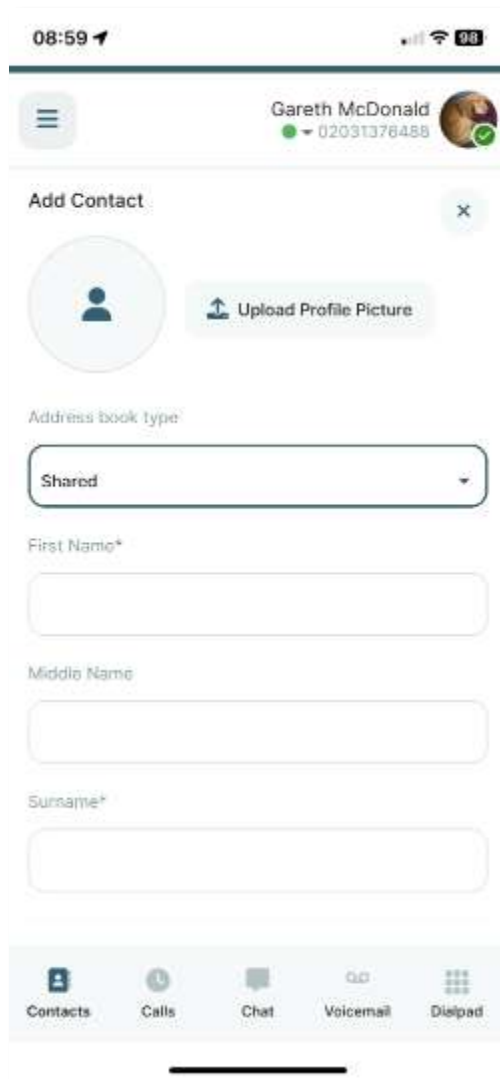
To add a new Shared contact, tap the 'Add Contact' button at the top of the Contacts pane.



Select 'Shared' from the 'Address book type' drop down list.

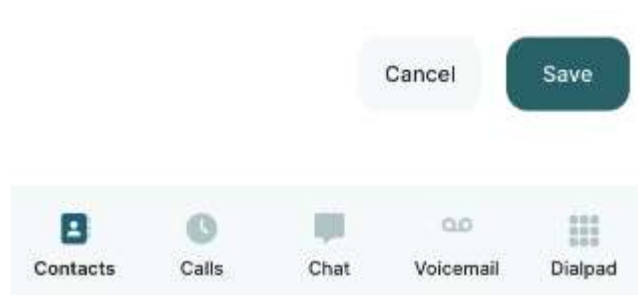


You must enter the contact's first and last names and a telephone number as a minimum. You may also add other details such as company name, job title, department and email. You may also upload a profile Avatar picture for each contact.



The screenshot shows the 'Add Contact' screen in a mobile application. At the top, the status bar displays the time 08:59 and battery level 98%. The app header shows a menu icon, the user's name 'Gareth McDonald', a status indicator, and a phone number '02031376488' next to a profile picture. The main section is titled 'Add Contact' with a close button (X). Below this is a circular profile picture placeholder with an 'Upload Profile Picture' button. The 'Address book type' is set to 'Shared' in a dropdown menu. There are three text input fields: 'First Name*' (required), 'Middle Name', and 'Surname*' (required). At the bottom is a navigation bar with icons and labels for 'Contacts', 'Calls', 'Chat', 'Voicemail', and 'Dialpad'.

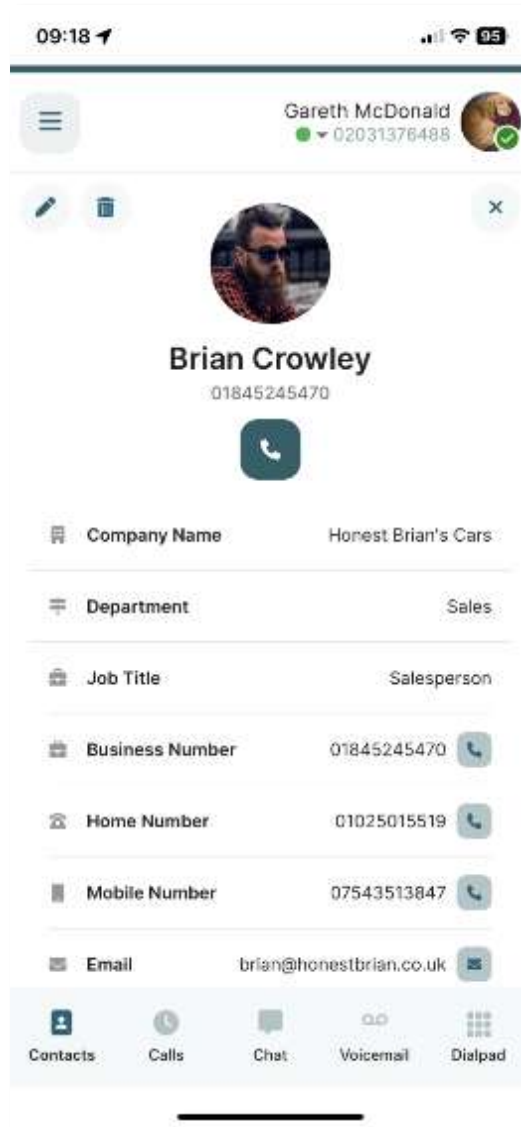
When you have populated the form with all the required details, tap the 'Save' button at the bottom of the screen.



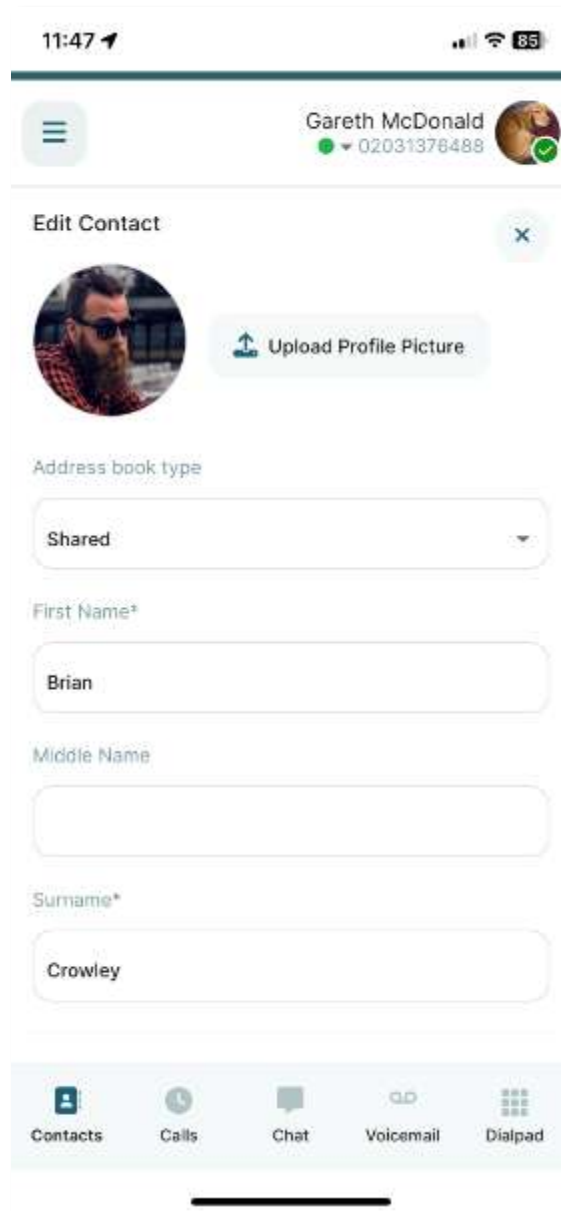
This close-up shows the bottom of the 'Add Contact' form. It features two buttons: a light gray 'Cancel' button and a dark teal 'Save' button. Below these buttons is the same navigation bar seen in the previous screenshot, with icons and labels for 'Contacts', 'Calls', 'Chat', 'Voicemail', and 'Dialpad'.

Edit a Shared contact

To Edit or Delete a contact, tap the  Edit or  Delete buttons, at the top of the Contact detail pane, accordingly. If these buttons aren't available, you don't have permission to edit or delete a Shared contact - please contact your support team.

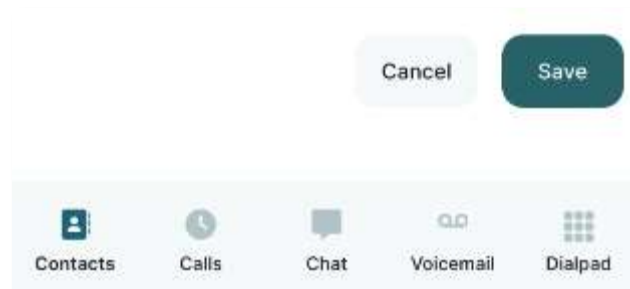


Make the required changes to the form.



The screenshot shows the 'Edit Contact' screen in a mobile application. At the top, the status bar displays the time 11:47 and battery level 85%. The app header shows a menu icon, the user's name 'Gareth McDonald', and a phone number '02031376488' with a green status indicator. The main content area is titled 'Edit Contact' with a close button (X). Below the title is a circular profile picture of a man with a beard and sunglasses, and a button labeled 'Upload Profile Picture'. The form includes a dropdown menu for 'Address book type' set to 'Shared', and text input fields for 'First Name*' (containing 'Brian'), 'Middle Name', and 'Surname*' (containing 'Crowley'). At the bottom, there is a navigation bar with icons and labels for 'Contacts', 'Calls', 'Chat', 'Voicemail', and 'Dialpad'.

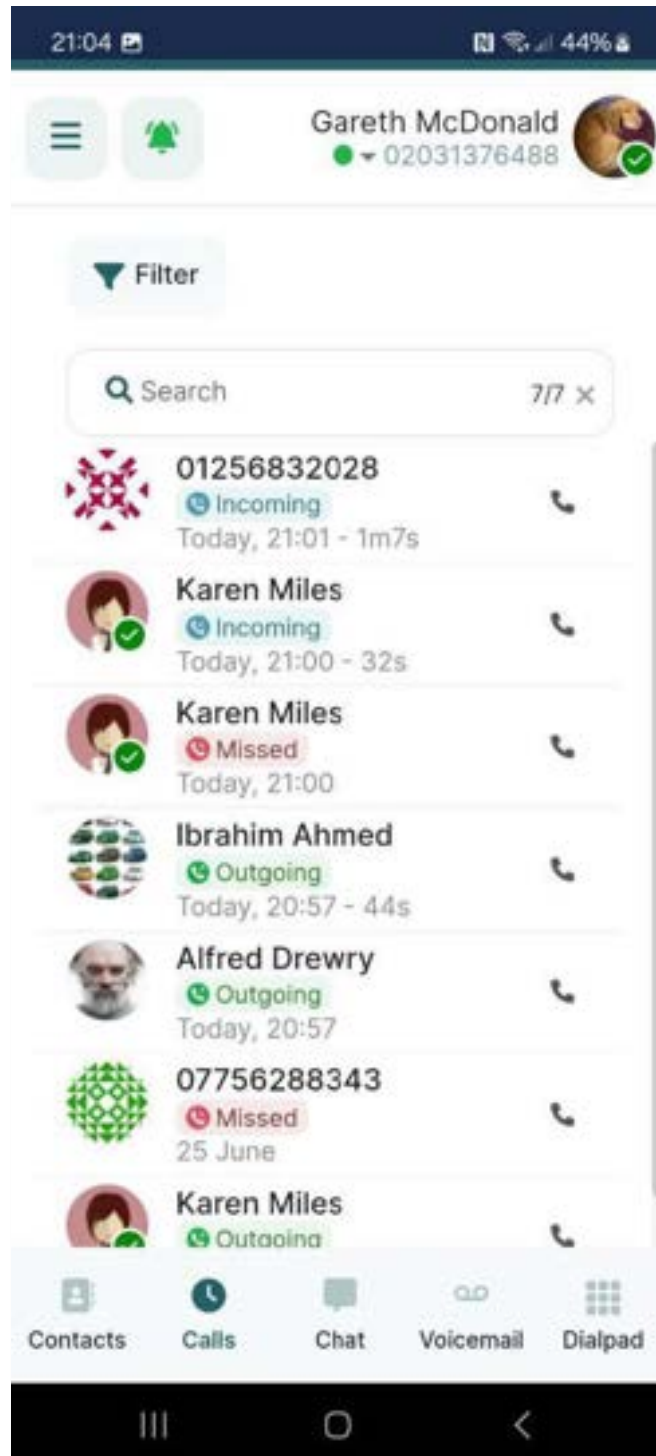
When you have made the required changes, tap the 'Save' button at the bottom of the screen.



This screenshot shows the bottom portion of the 'Edit Contact' form. It features two buttons: a light blue 'Cancel' button and a dark teal 'Save' button. Below these buttons is the same navigation bar seen in the previous screenshot, with icons and labels for 'Contacts', 'Calls', 'Chat', 'Voicemail', and 'Dialpad'.

Call History

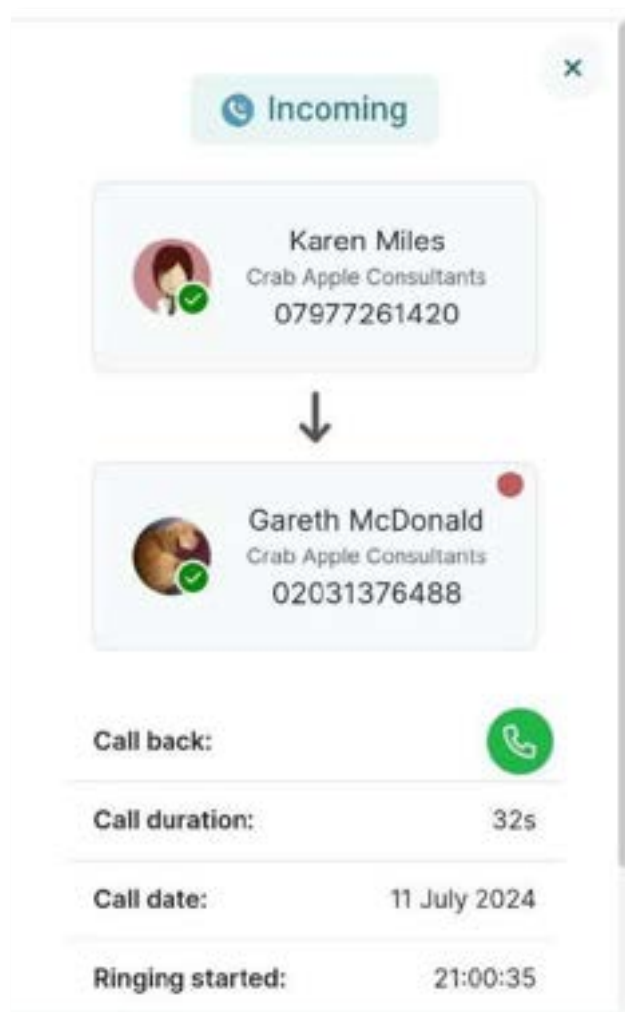
Call History shows a list in the Main pane of your last 300 incoming, outgoing and missed calls. Once 300 entries have been reached, new entries will overwrite the oldest ones.



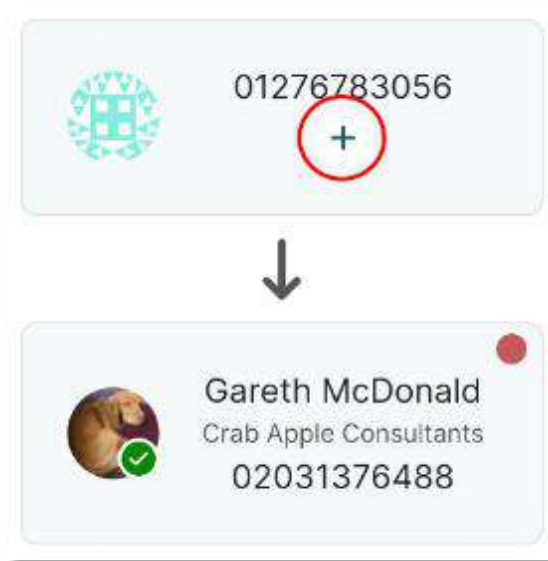
Each entry in the list contains a tag to indicate the direction of that call. To call the number, click the telephone handset button located next to each entry in the Main Pane.



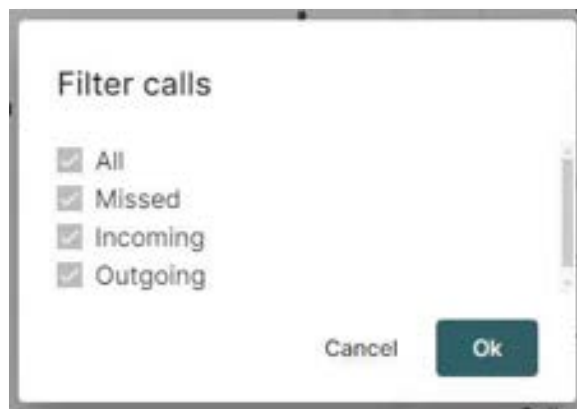
Selecting a Call History entry in the Main Pane will display further details of the entry in the Details Pane. This view also includes a similar call direction tag. You'll see the duration, time, date, etc.



If a Call History entry is not matched to an address book entry, a '+' button will be shown below the number (circled). Click the plus button to [add a new address book entry](#).



At the top of the list, there are also a Filter button and a Search function. Clicking the filter button reveals check boxes to allow you to select or deselect different call types to view in the list and therefore include or exclude them in the displayed results. You may select more than one check box concurrently.



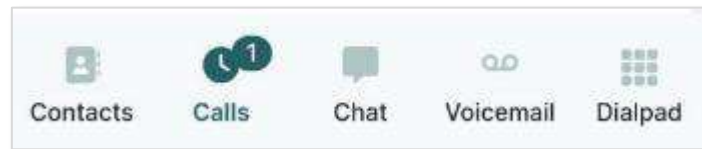
If you do not select the Missed checkbox, the Filter button will warn you accordingly.



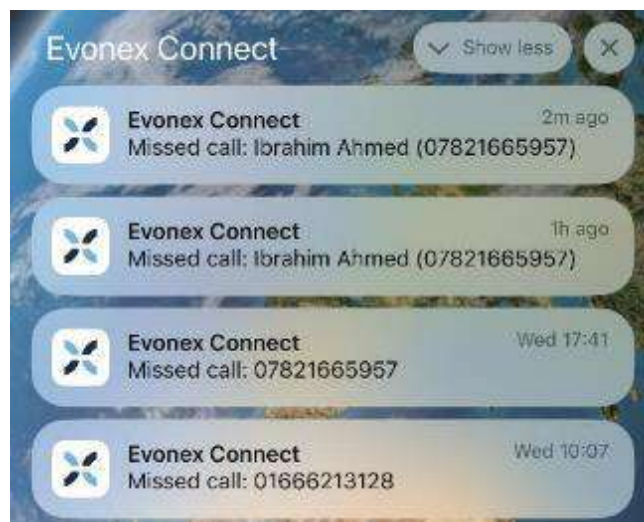
Search allows you to enter alphanumeric text to further narrow-down the results, which are displayed in descending chronological order. You may search by contact, company or department name or telephone number.



If you receive a missed call, a notification badge will be located on to the Call History option in the Menu Bar. Tap it to be taken to the Call history list. If necessary, use the Filter button to view only your missed calls. Your latest missed call will be at the top of the list. Once you have viewed the new missed calls the notification badge will disappear.



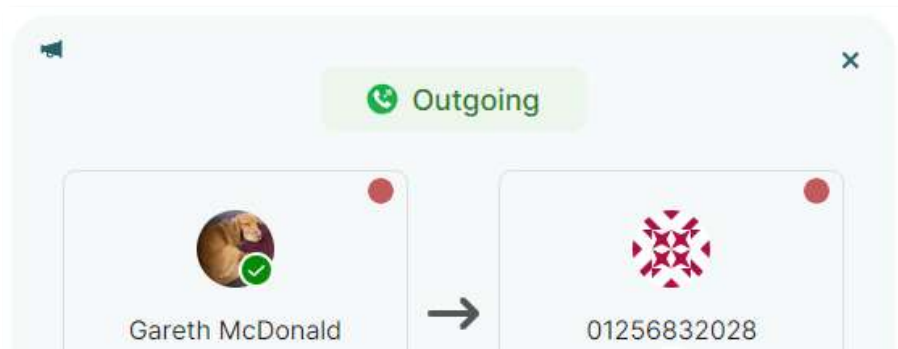
If you miss any calls while your device is locked, details of the calls will be displayed on the lockscreen of your device, similar to the image below. This feature is enabled and disabled in Settings.



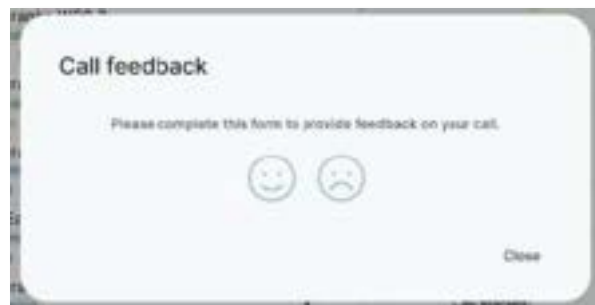
Call Feedback

From time to time, it may be necessary to send feedback to the Evonex Team regarding a historic call. This could be because you experienced a problem with the call which requires investigation. The information sent to the Team is enough for us to identify the call in our logging and diagnostic tools, such as date, time, telephone numbers, usernames, etc, but no other personal data is sent.

To provide feedback for a call, firstly locate it call in your call history. Select it and the detail screen will show the details of the call. Click the Feedback button in the top-left corner of the call history detail pane.



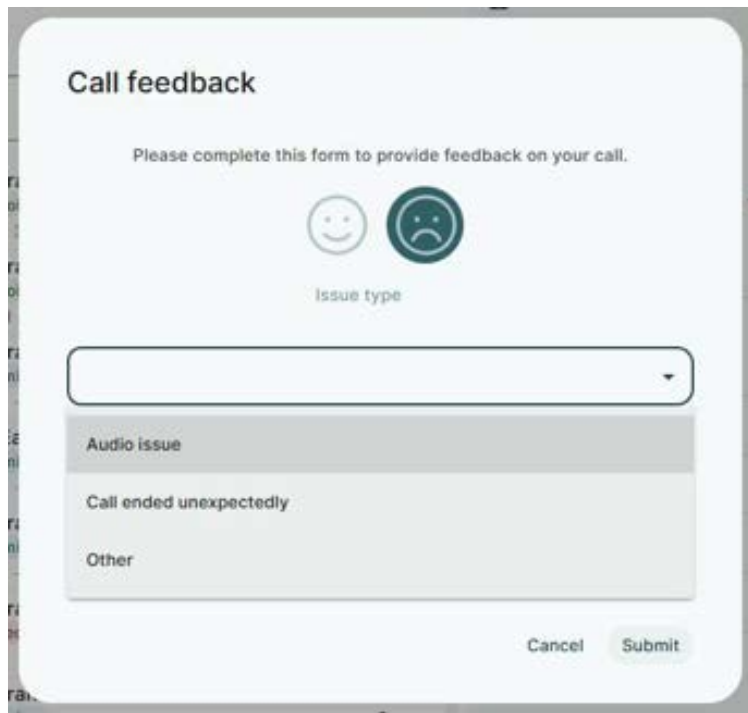
The Call feedback panel will appear.



Select the happy face to provide positive feedback, enter a comment and click 'Submit'.

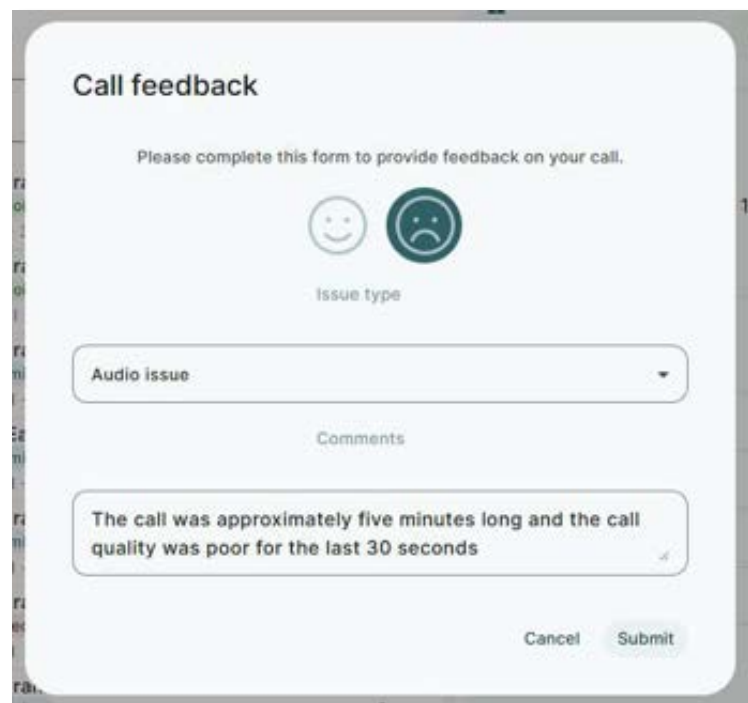


Alternatively, select the unhappy face to provide feedback requiring investigation. Firstly, select an Issue type: 'Audio issue', 'Call ended unexpectedly' or 'Other'.



The image shows a 'Call feedback' form with the title 'Call feedback' and the instruction 'Please complete this form to provide feedback on your call.' Below the instruction are two circular icons: a smiley face and a frowny face. The frowny face is selected, and the text 'Issue type' is centered below the icons. A dropdown menu is open, showing three options: 'Audio issue', 'Call ended unexpectedly', and 'Other'. At the bottom right are 'Cancel' and 'Submit' buttons.

Enter a comment and click 'Submit'.



The image shows the same 'Call feedback' form, but now the 'Issue type' dropdown menu is closed and 'Audio issue' is selected. Below the dropdown is a text area labeled 'Comments' containing the text 'The call was approximately five minutes long and the call quality was poor for the last 30 seconds'. At the bottom right are 'Cancel' and 'Submit' buttons.

Please also contact and inform your support team, so they're able to follow-up with progress of the investigation on your behalf.

Call Recording Playback

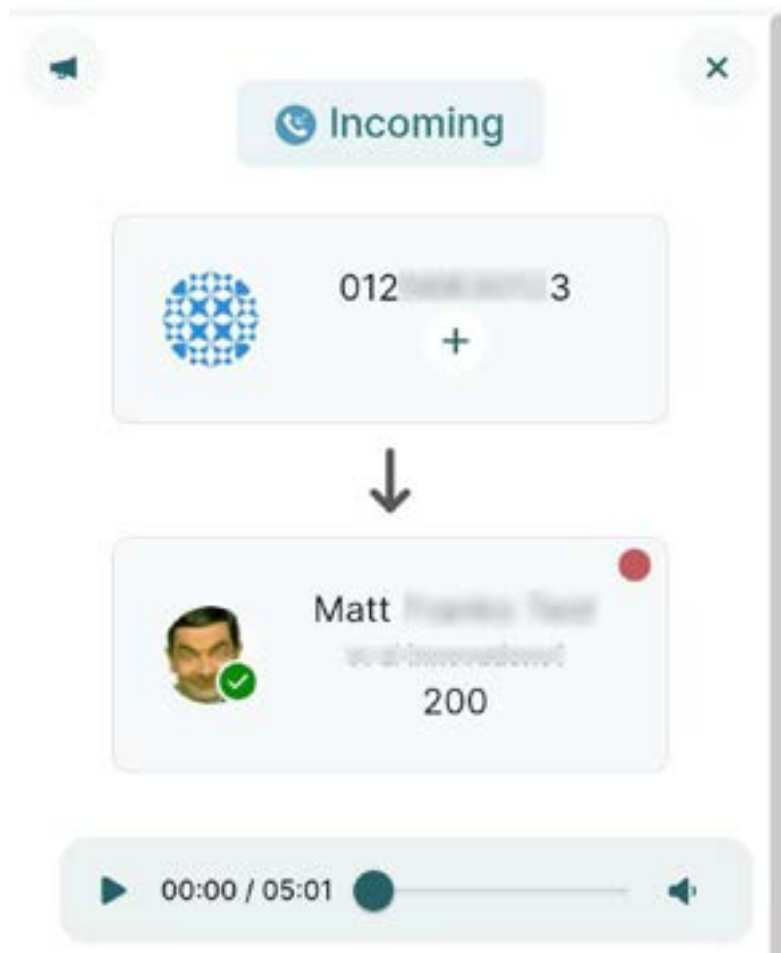
If a call was recorded, and you have permissions to do so, you can playback the recordings of calls you have made and received, directly from the call history detail pane. You can access recordings for all outgoing calls you make and the individual legs of incoming calls that you're involved in.

For example, if you answer in incoming call a call to a huntgroup, have a conversation with the caller for 3 minutes, then transfer the call to a colleague, you will only be able to play back the 3-minute part of the call that you were involved in. You will not be able to playback the part of the call after you transferred it to your colleague.

Please contact your administrator or your support team to have your permissions modified to allow you to access your call recordings in Evonex Connect. Please note, downloading a call recording as an MP3 file is not possible with the Evonex Connect mobile apps, and that administrators can play back and download all parts of all calls via the Evonex Portal.

Call recording indicators

When you view the call history detail pane, and the call was recorded, you will see one of three types of recording indicator (red circle) in the top-right corner of either the source or destination box.

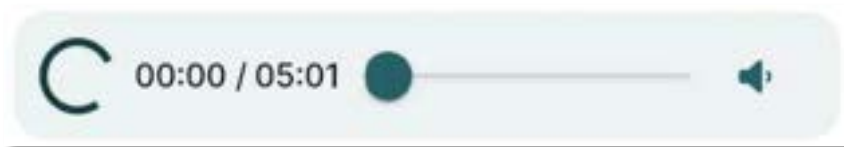


Recording indicator types:

Indicator	Description
	Recording is available and ready to play. A playback scrub bar will also be shown.
	Recording is processing. Please try again in 30 seconds. Alternatively, this could also mean that the call length was too short (less than 3 seconds) and the recording could not be processed.
	Recording has been deleted and can no-longer be played.
No indicator	The call was not recorded

Playing through the earpiece and loudspeaker

Below this you'll see a playback scrub bar. Click the play button to start the playback. The recording will start to download in readiness for playback, and the button will change to an activity spinner.



When the download has finished, the recording will begin to play automatically through the device's earpiece, and the spinner will change to a pause button.



Drag the scrub bar to any part of the recording to play from that point.



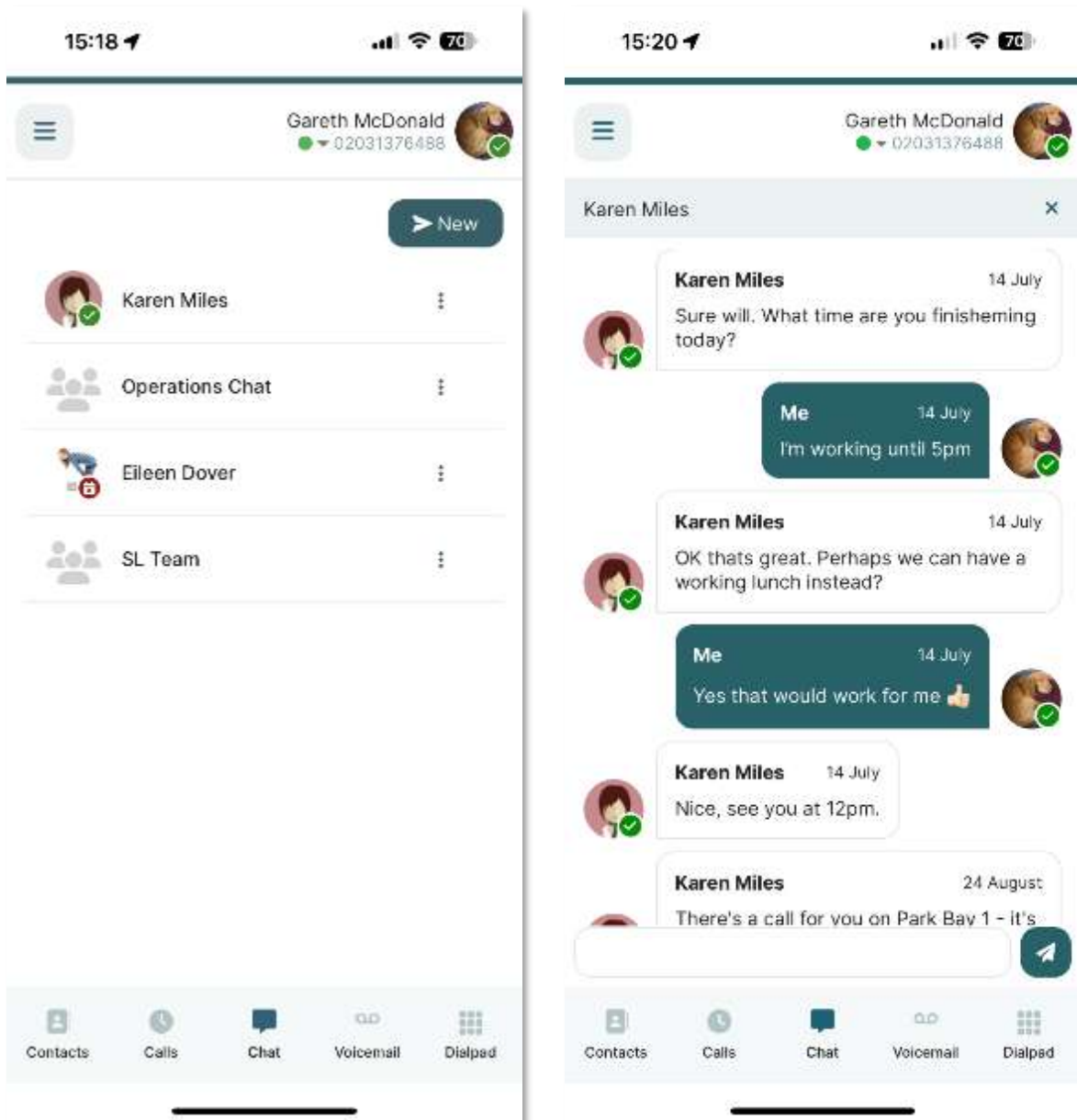
To play the recording through the device's loudspeaker, tap the loudspeaker button on the right-hand side of the scrub bar. Please note, downloading a call recording as an MP3 file is not possible with the Evonex Connect mobile apps.



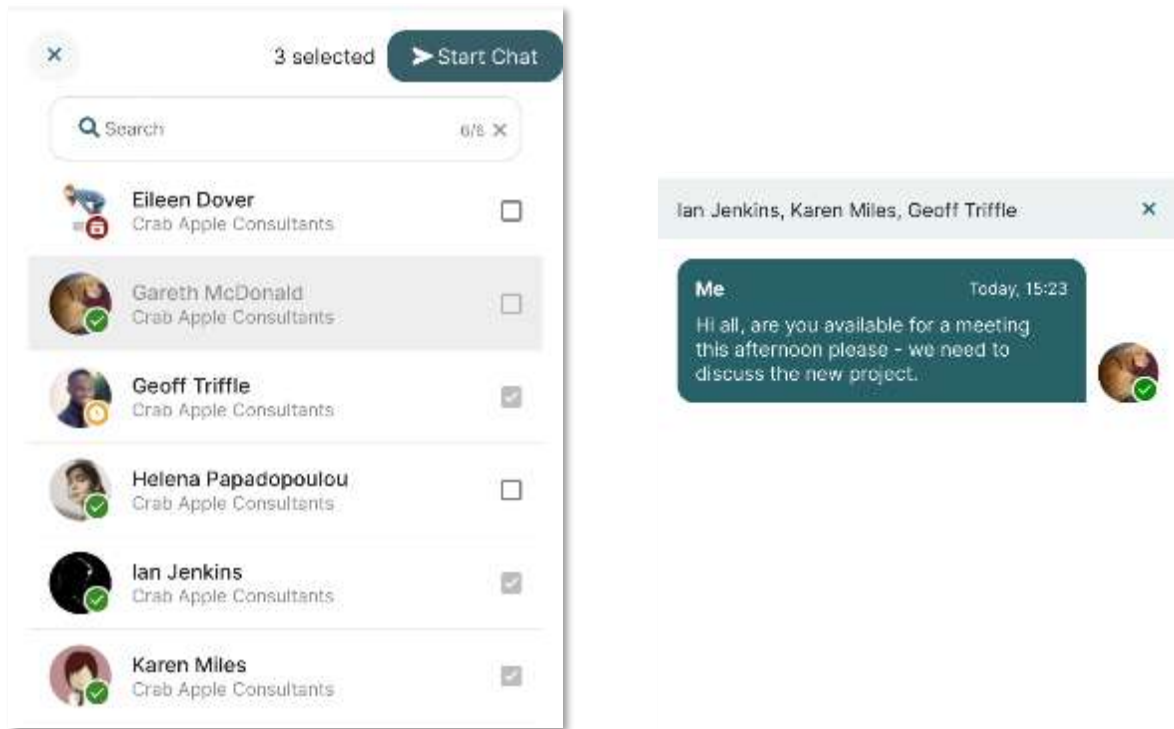
Chat

Chat allows you to exchange short messages between your colleagues. You can use chat to send text, emoji and Web Links.

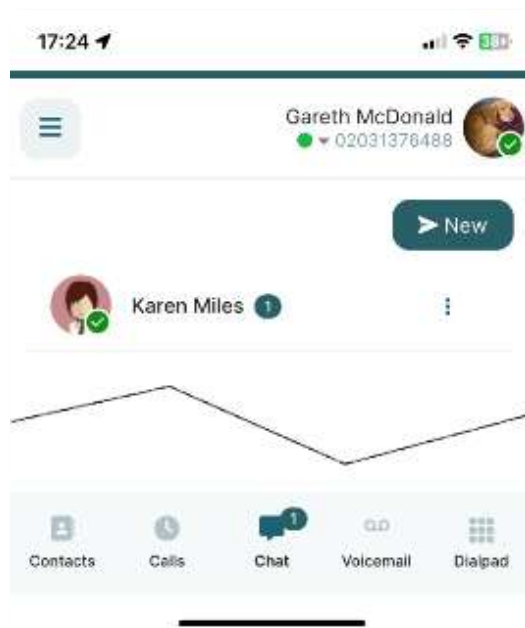
Chat can be useful if you are working in a different location to your colleagues. For example, they could quickly and easily tell you there is a call parked for you. Or you can keep up to date with multiple colleagues all working on a common project via a group chat.



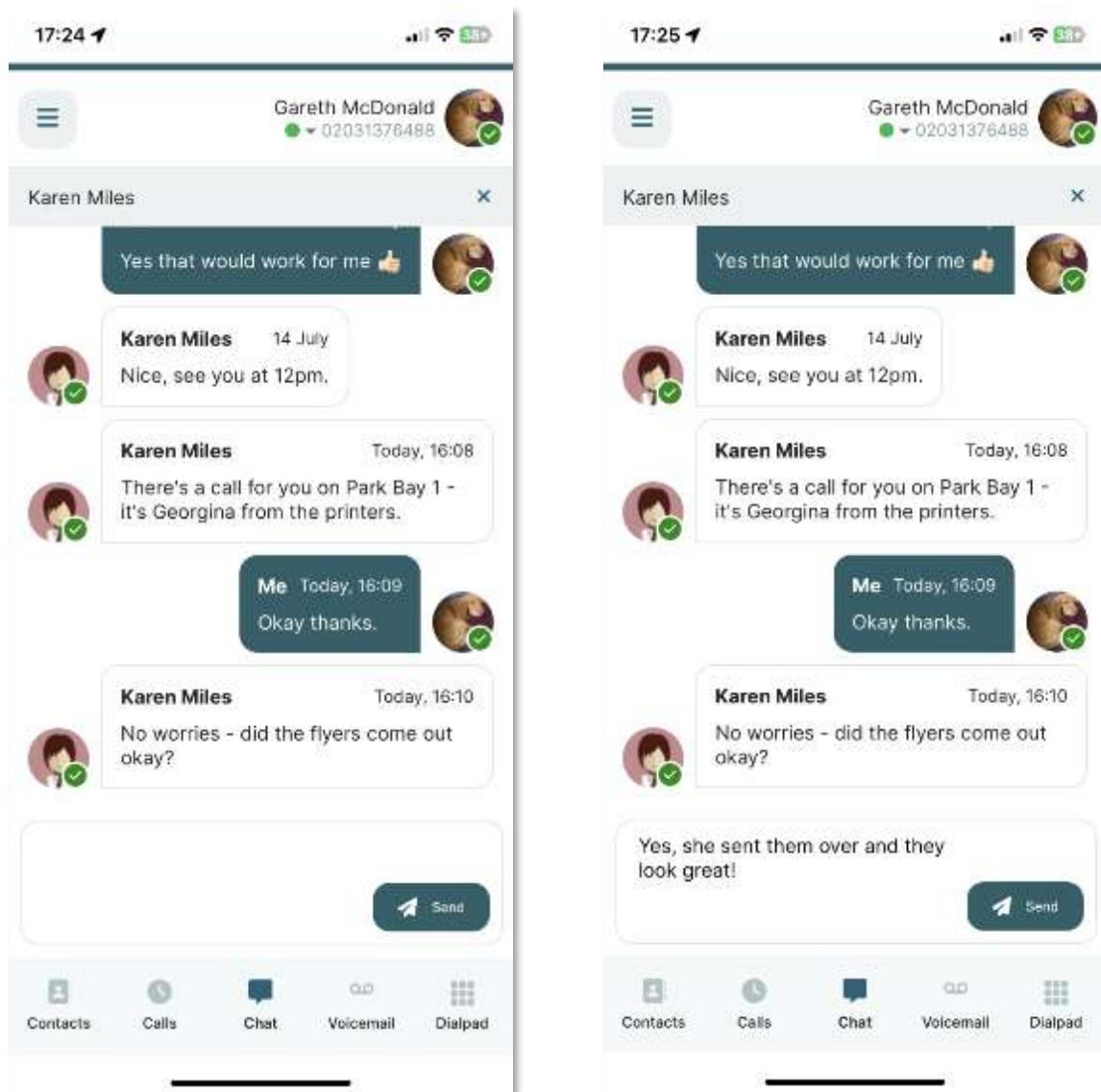
To start a new chat, tap the  New button at the top then search or scroll for the Directory contact(s) you wish to add to the chat. Select one, or as many as required, and click  Start Chat. Your new Chat window will appear. Type your Chat message and press Enter or click  Send.



When you receive a new Chat message, you will hear a notification sound and see a notification popup. You will also notice a notification badge next to 'Chat' in the Menu Pane.



When you tap the new Chat message, the notification badge will disappear, and the body of the message will be shown.



Type your reply and tap 'Send'.

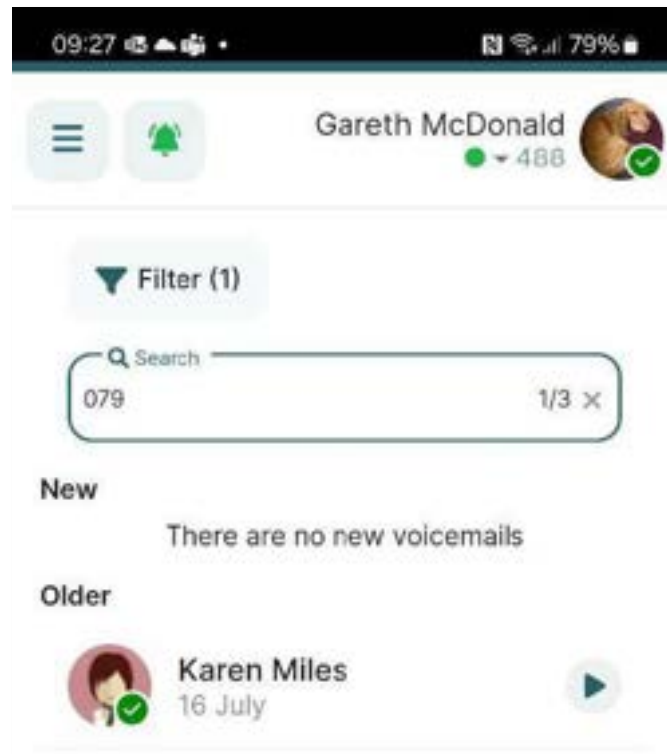
Voicemail

The Voicemail message list

The Voicemail Menu option provides you with a list of your Voicemail messages in the Context Pane sorted into descending chronological order. There is a  play button available on each message – simply tap the button to ‘quick-play’ it.

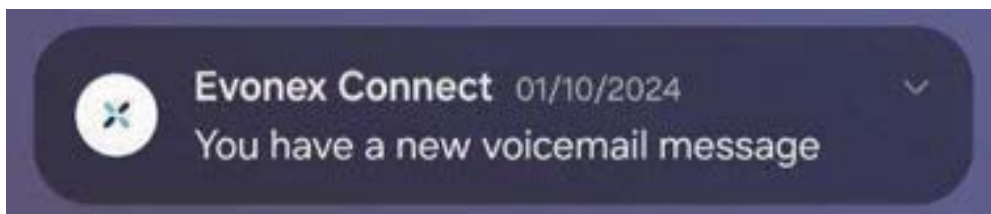


There is a 'Search' field at the top of the Context pane which allows you find a specific message(s) if there are many in the list. You may search by name or telephone number. The quantity of messages displayed as a result of your search is shown in the right-hand side of the 'Search' field versus the total number of messages in the list.

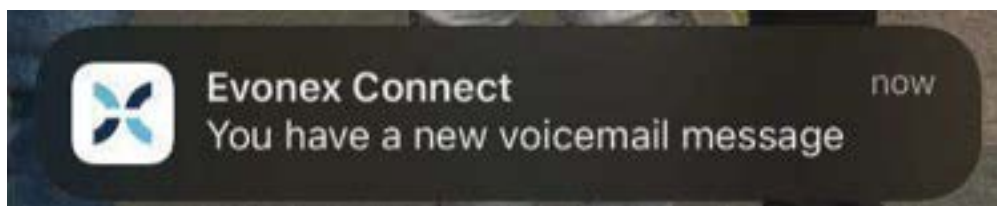


Receiving a new voicemail message

When you receive a new Voicemail message, you will receive a push notification on the lock screen of your device.



Push notification on Android



Push notification on iOS

There will also be a notification badge next to 'Voicemail' in the Menu Bar. The telephone number or Contact name or telephone number will be emboldened until you have listened to the message. New messages are always shown at the top of the list.



Selecting a Voicemail message in the Context Pane shows more detail of the message in the Detail Pane. You can view who the caller was – matched to an address book entry if applicable – and you'll also see the number they called, the date, time and duration of the message.



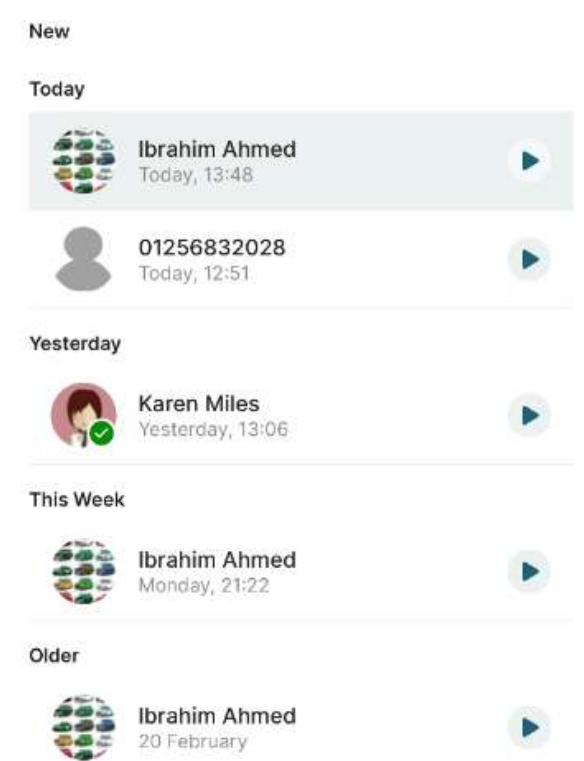
From here, you may also play back the message by tapping the play button. You may toggle between playing back via the loudspeaker and earpiece by tapping the speaker button. You may also delete the message or call back the sender of the message by clicking the respective buttons below the scrub bar.



You're also able to read a transcription of the message by tapping the  button. When you tap this button, the system analyses the speech in the message, converts it to text, and displays it on screen.



When a message has been listened to it becomes marked as old and it moves to one of five headings depending on when the message was recorded: 'Today', 'Yesterday', 'This Week', 'Last Week' and 'Older'. It will be sorted into your other old messages in descending chronological order.

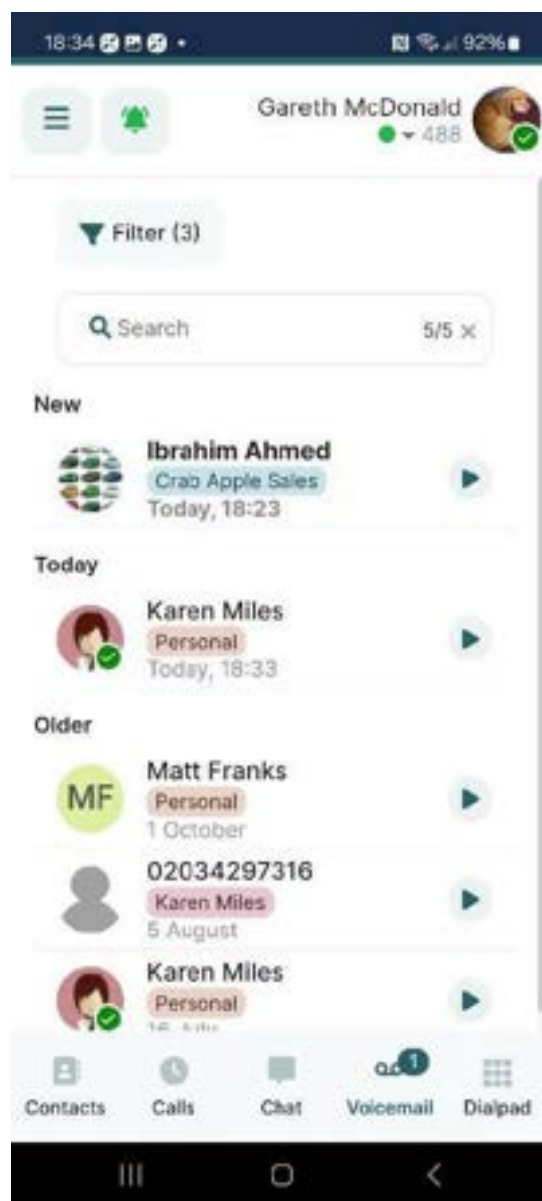


Shared or Group voicemail inboxes

Evonex Connect supports Shared or Group mailboxes. That means, if your administrator allows, you can monitor the voicemail messages in your colleague's mailbox or in a Group mailbox like 'Sales'. You'll be able to get notifications of new messages, play and delete them, read a transcript, or call back the sender, just as you can with your own messages.

When this is enabled, you'll notice a 'tag' has been automatically applied to the messages in the Voicemail message list. The name of the tag is the name of the user associated with that mailbox. Your own messages will be tagged with 'Personal' so you can easily identify them in the list.

The colour of the tag is deterministic and therefore uniform across you and your colleague's Evonex Connect devices. For example, 'Crab Apple Sales', in the example below, is a blue tag – this will also be a blue tag for your colleagues, if they are monitoring this mailbox too.



Example of a user monitoring messages in the 'Crab Apple Sales' and 'Karen Miles' mailboxes. The user's own messages are tagged as 'Personal'

The message detail pane also shows a corresponding tag at the top. In both views, the telephone number of the caller, and name if saved as a contact, as well as the date are preserved and shown.

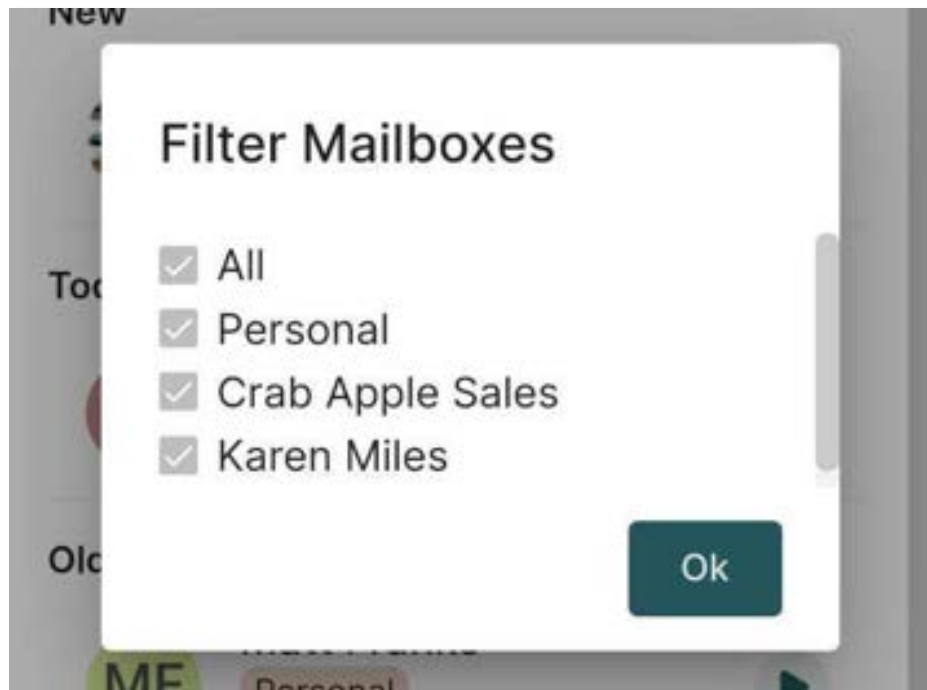


Filtering messages

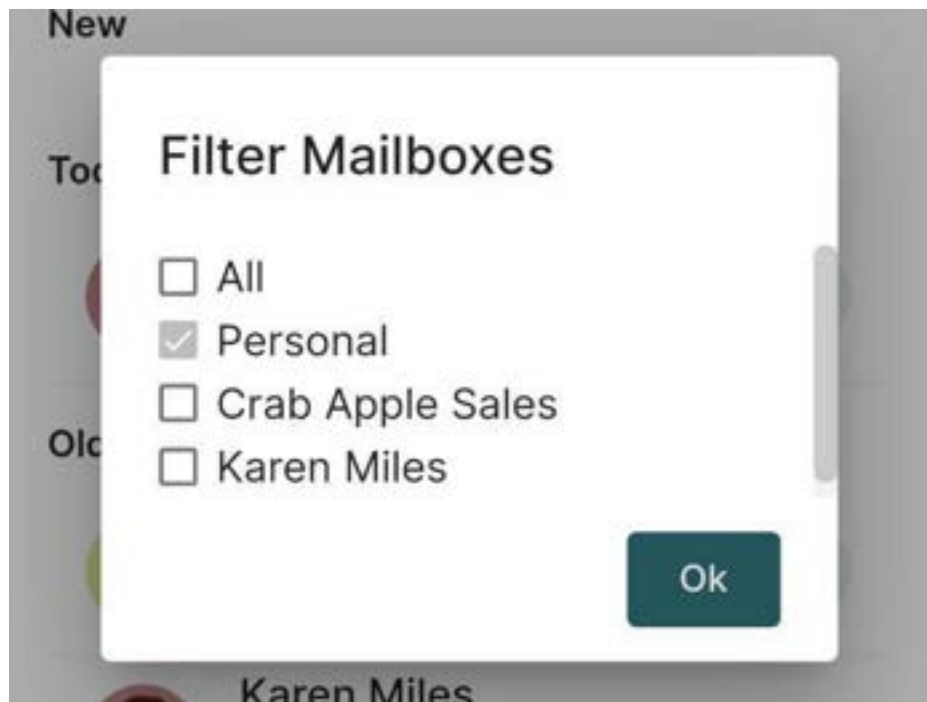
Use the 'Filter' button at the top of the Voicemail list pane to toggle the display of messages within the mailboxes you're monitoring. The number on the button indicates how many mailboxes you're currently displaying messages for.

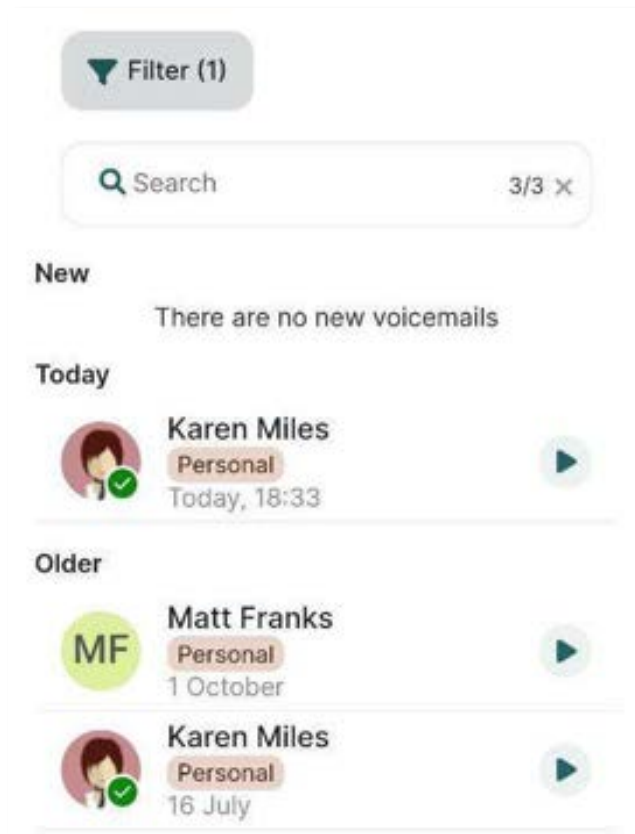


Tapping the 'Filter' button shows the mailboxes you've permission to monitor with a checkbox next to each one. The default is that 'All' mailboxes are selected and therefore you'll see all messages you've permission to.

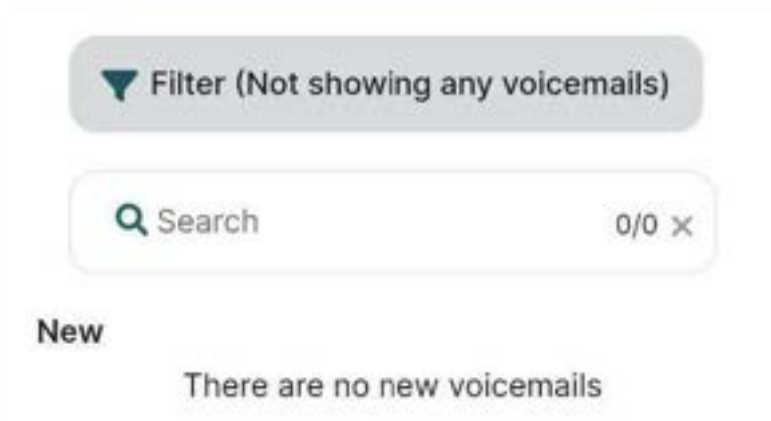


If you wish to see fewer messages, tap the checkbox next to a mailbox to unselect it, then tap Ok. You will then only see messages within the mailboxes that remain selected





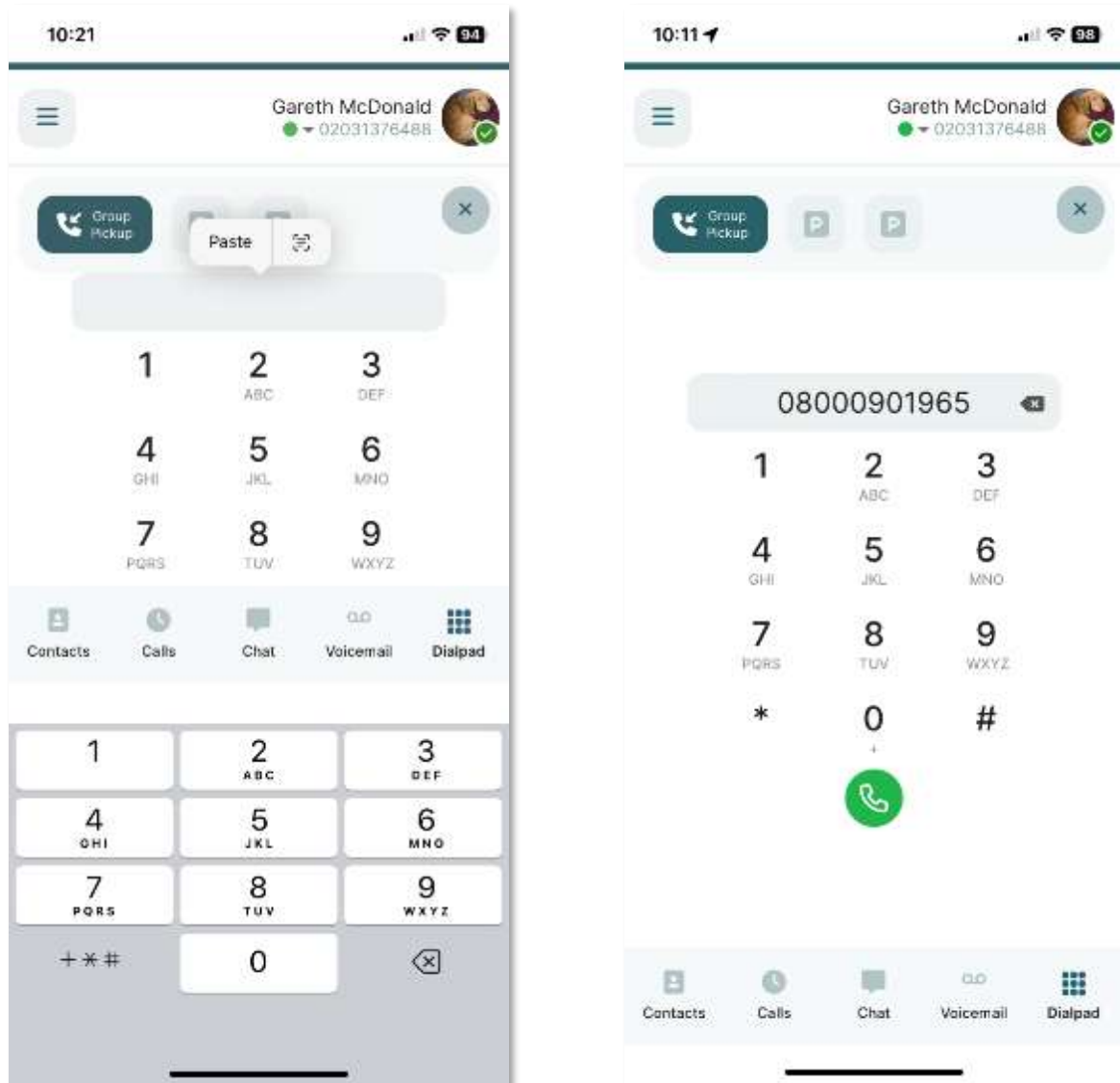
If 'Not showing any voicemails' is shown on the 'Filter' button, you have inadvertently unselected all mailboxes. Tap the button and select one or more checkboxes to rectify this.



You may also combine the Search feature with Filtering. Any searches you perform will apply only to the mailboxes you currently have selected. You may search by the caller's name, caller's telephone number or mailbox name.

Dialpad

The Dialpad screen allows you to manually enter a telephone number to dial. You may either tap the digit buttons on the Dialpad, use the numerical keys on the iOS or Android keyboard, or paste a telephone number copied from another application. When entering digits, you will hear a tone as each digit is tapped. You may disable these tones by going to 'Settings > Audio > Dialpad key tones'.



To dial the digits entered, tap the  green Dial button.

If you enter characters that are not numerical, they will be ignored when dialling.

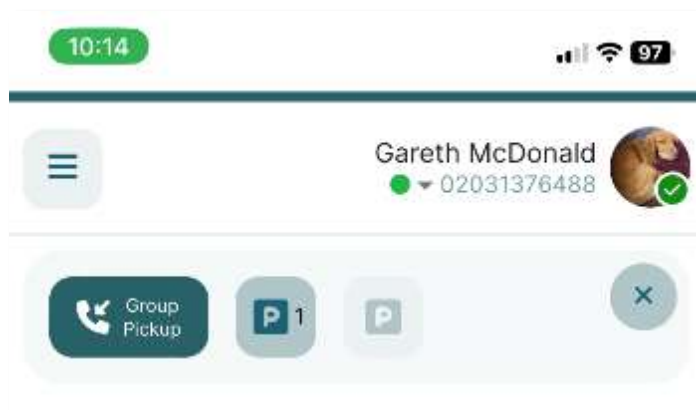
You may long-click the '0' button or use the keyboard to enter a + sign for international destinations.

If you make mistake when entering digits and wish to delete some already entered, tap the  back button. Long-press to remove all digits entered.

The Dialpad also provides access to the Park Bays and Group Pickup button.



Parking is a way to place a caller on hold so that they may be UnParked by any other user on your account. The Park Bays are used to provide visual indication that a call has been Parked, either by you or one of your colleagues. When a call is Parked in a Bay, simply tap the relevant Park Bay to UnPark the call. For further information, see the [Parking](#) section.



Use the Group Pickup button to answer a call you can hear ringing on another telephone or if you notice one or more of your colleagues' Presence statuses shows as 'Ringing'.

Simply click the Group Pickup button to connect to the ringing caller. Please note, you must be part of the same Pickup Group as the phone you're trying to pick up – please speak to your Support Desk for further details.

Call Handling

Make a call

As shown elsewhere in this guide, there are several ways to make a call with Evonex Connect. You may dial a Contact by tapping the call button, you may redial or return a call via Call History, or you may enter a number to dial via the Dialpad.

In all cases, when the call is in progress, you will see a screen similar to the image on the left below.

To end the call before it is connected, click the  Hang Up button.



Outbound call on iOS



Outbound call on Android

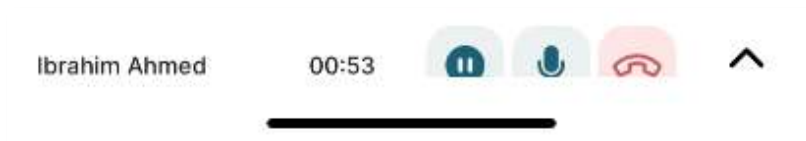


Active call on iOS



Active call on Android

When the call is connected, the Call Control Pane appears, as shown on the right above. The Call Control Pane allows you to perform such tasks as hold, transfer and park the call which will be covered later in this guide. You may minimise this Pane at any time by tapping the down arrow in the top-right-hand corner of the screen.



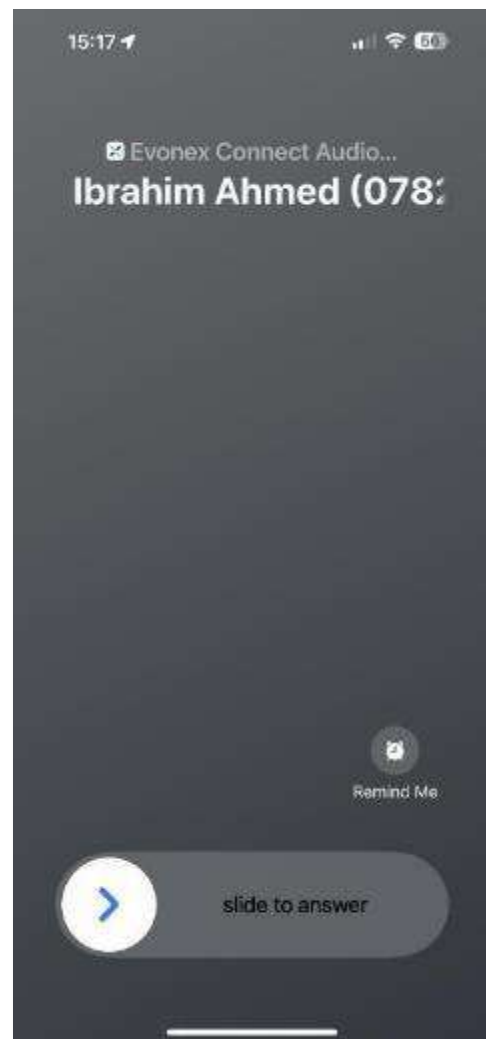
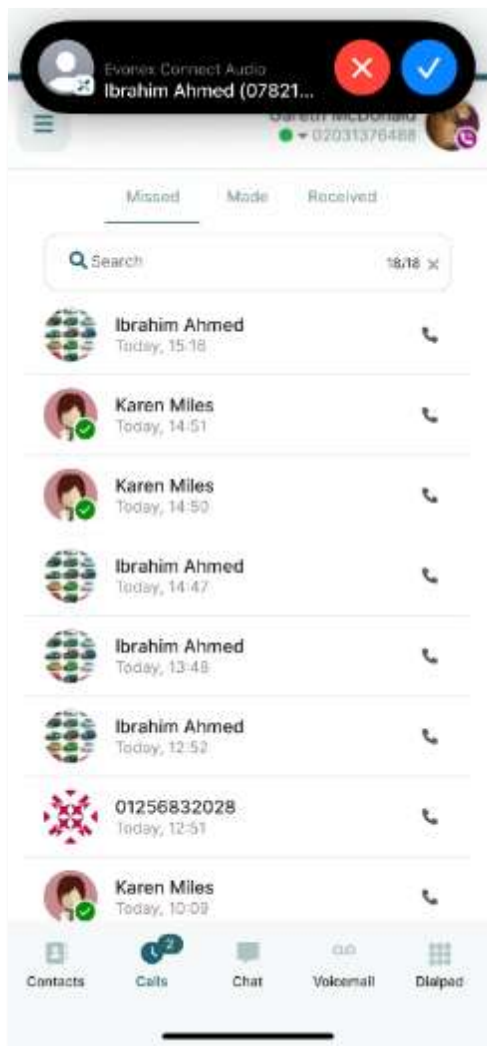
The minimised view contains quick access to the Hold, Mute and End buttons. Tap the Up arrow or anywhere on the Call Control Pane to maximise.

Receive a call

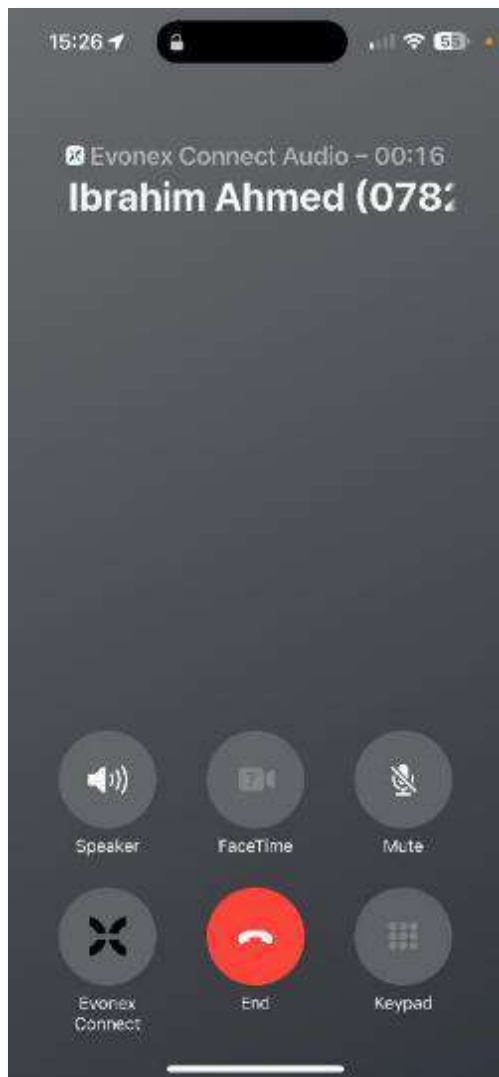
We are utilising the developer tools available in iOS and Android to provide integration to the native Phone apps. Therefore, you will benefit from push notifications to wake the app when a call rings, to save battery and data usage. Where possible, the native iOS and Android Phone app screens are utilised to allow you to interact with the call.

iOS

When you receive an inbound call to your telephone number, if Evonex Connect is on screen, you will see a popup at the top of the screen allowing you to Answer  or Reject  the call, similar to the image on the left below. Answering the call will show the Call Control Pane maximised, similar to the image above. Rejecting the call will send the caller to your Voicemail, by default.

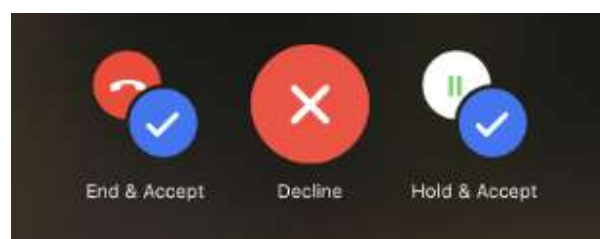


If your phone is locked when a call arrives, you will see a screen similar to the one on the right above. Slide to answer the call and the screen will change to one similar to the image to the left below.



You will have access to buttons to mute the call, put it on speaker and end the call. If you tap the Evonex Connect button, you'll be taken to the Call Control pane in the app, shown on the right above. This provides you with further options, as described below.

If you receive an Evonex Connect call whilst on another call on your mobile device, you'll be presented with the following three buttons:



End & Accept – end your current call and answer the ringing Evonex Connect call.

Decline – reject the ringing Evonex Connect call (will send it to voicemail).

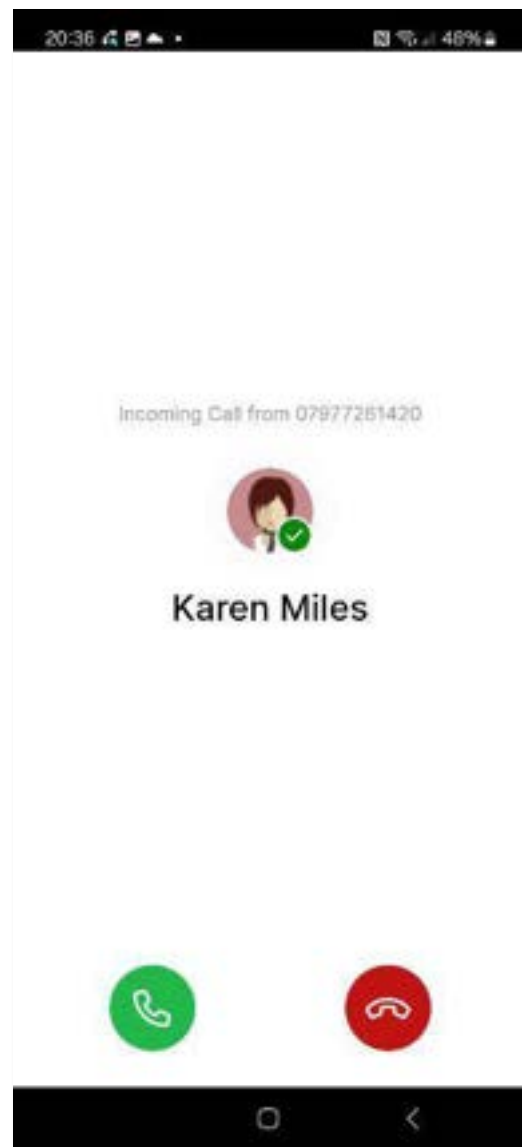
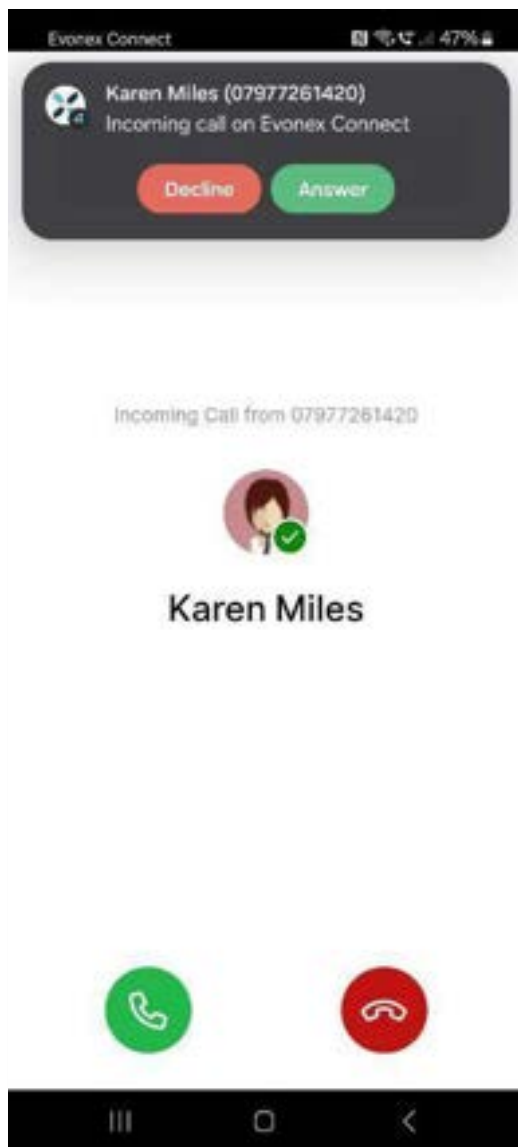
Hold & Accept – hold your current call and answer the ringing Evonex Connect call.

Android

When you receive an inbound call to your telephone number, if Evonex Connect is on screen, you

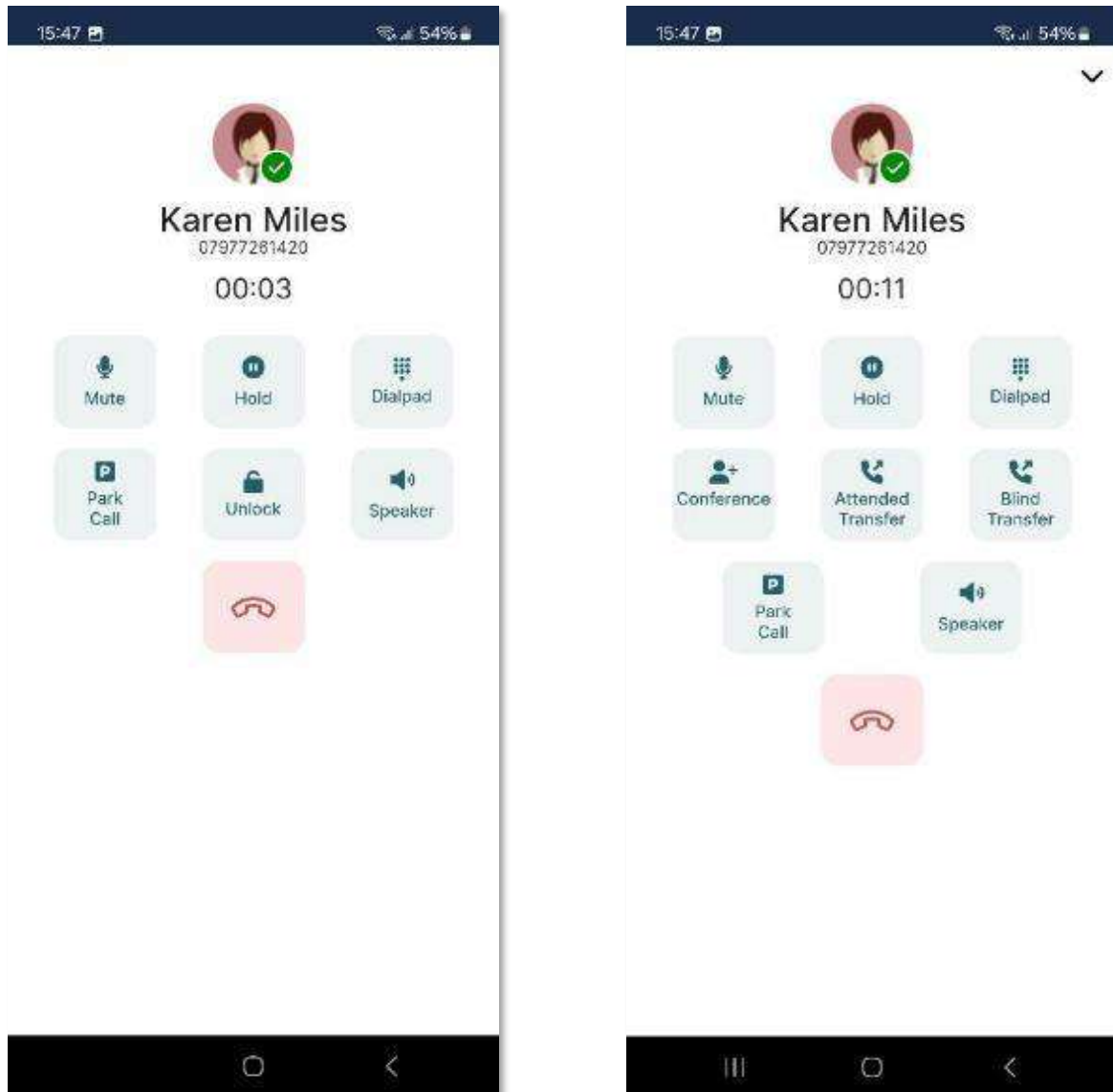
will see a popup at the top of the screen, and an incoming call overlay, allowing you to Answer 

or Decline  the call, similar to the image on the left below. If Evonex Connect is not on screen, you will only see the popup at the top of the screen with the Answer and Decline options. Answering the call will show the Call Control Pane maximised, similar to the image above. Rejecting the call will send the caller to your Voicemail, by default.



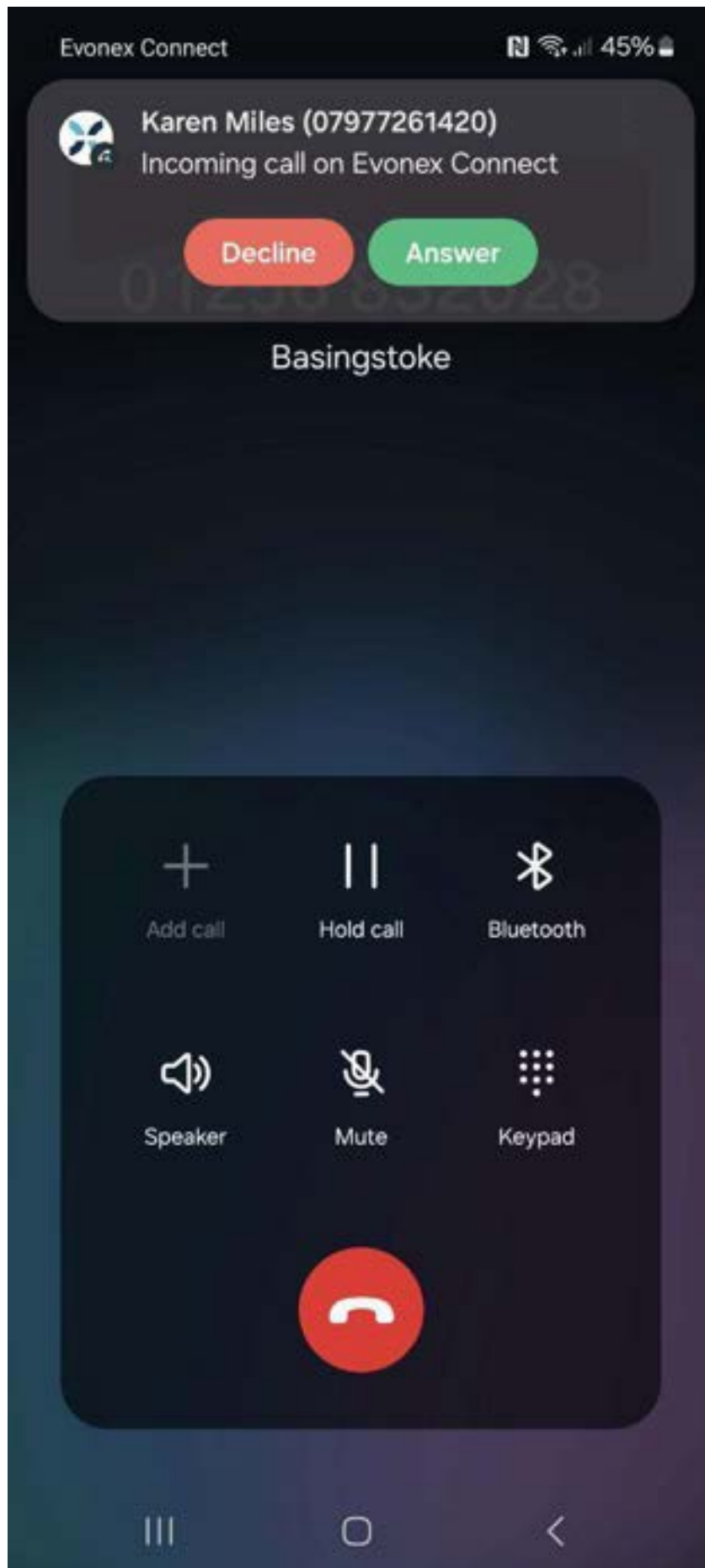
If your phone is locked when a call arrives, you will see a screen similar to the one on the right

above. Tap Answer  to answer the call and the screen will change to one similar to the image on the left below.



You will have access to the Call Control pane and buttons to Mute, Hold and Park the call, access the Dialpad, put it on Speaker and End the call. If you tap the 'Unlock' button, you'll be provided with further handling options similar to the image on the right above (Conference, Attended Transfer and Blind Transfer) as described below.

If you receive an Evonex Connect call whilst on another call on your mobile device, you'll be presented with a popup and the option to either 'Answer' or 'Decline' the Evonex Connect call. Answering will put the first call on hold. Declining will send the second call to your Evonex Voicemail, by default.



Call Control Pane

When a call is active, the Call Control Pane appears. The Call Control Pane allows you to perform such tasks as hold, transfer and park the call.



Call Control Pane on iOS



Call Control Pane on Android

You may minimise this Pane at any time by tapping the down arrow in the top-right-hand corner of the screen.



The minimised view contains quick access to the Hold, Mute and End buttons. Tap the Up arrow or anywhere on the Call Control Pane to maximise.

Mute

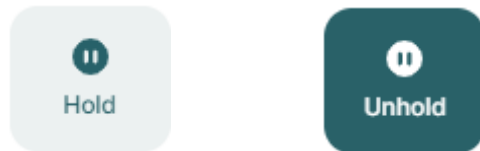
Tapping the 'Mute' button will mute your microphone so the caller cannot hear you. The button will change to 'Unmute'.



Tap to unmute your microphone.

Hold

Tapping the Hold button will put the caller on hold. They will hear hold music while on hold. The button will change to 'Unhold'.



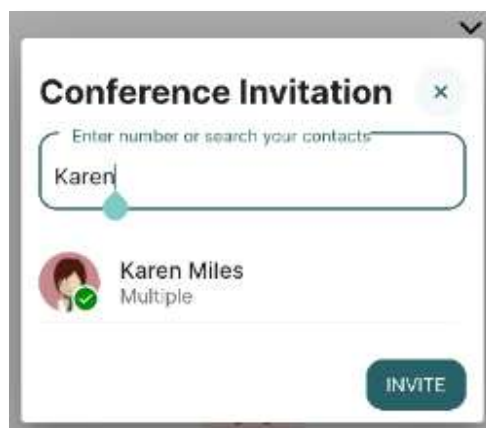
Tap to return to the caller.

3-way Conference (Android only)

To make a three-way Conference call, firstly you must have an active two-way call. This call could be one you make or receive.



Next, tap the Conference button and select or search for the Contact you wish to add to the call from the resulting window. During this process you may still talk to and hear the original caller.



Click the telephone number of the contact and the Evonex Connect will attempt to call the number. The original caller will be placed on hold. You will see the call to the third party appear as a new call

below the original one, with a  purple pulsating handset to indicate the call is ringing. The original call is still on hold.

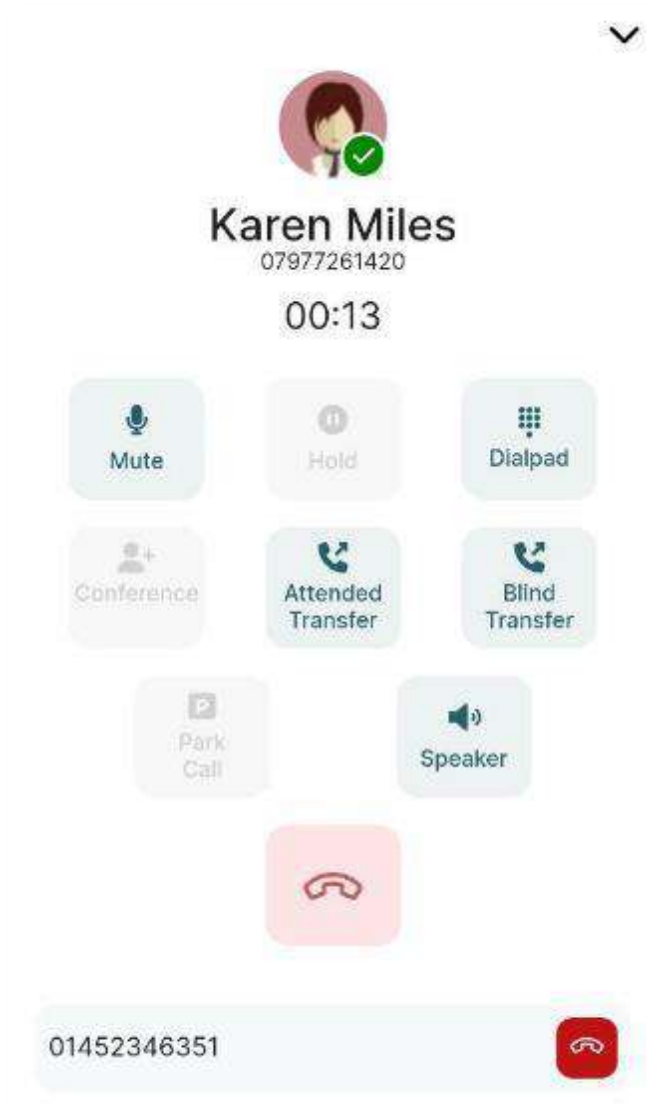


When connected, the new call becomes active and therefore the calls swap round on the call control pane. You are now able to talk to the new caller without the original caller hearing the conversation.



Press the toggle  button to toggle between this caller and the caller on hold.

When you are ready to join all calls together, click the  green + button. At this point, all three parties can talk to each other.



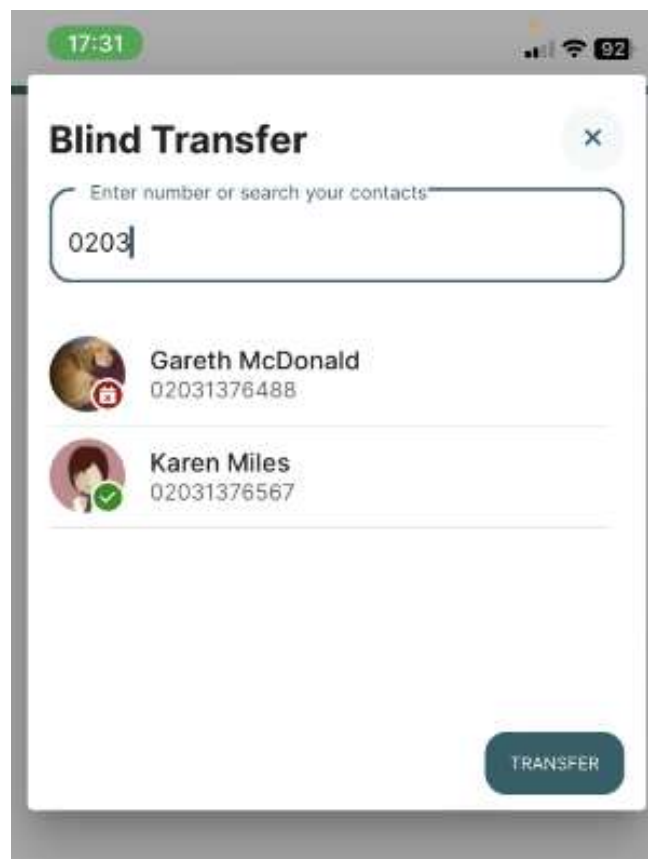
You may end either call by clicking the corresponding  or  red 'End' buttons.

Blind Transfer

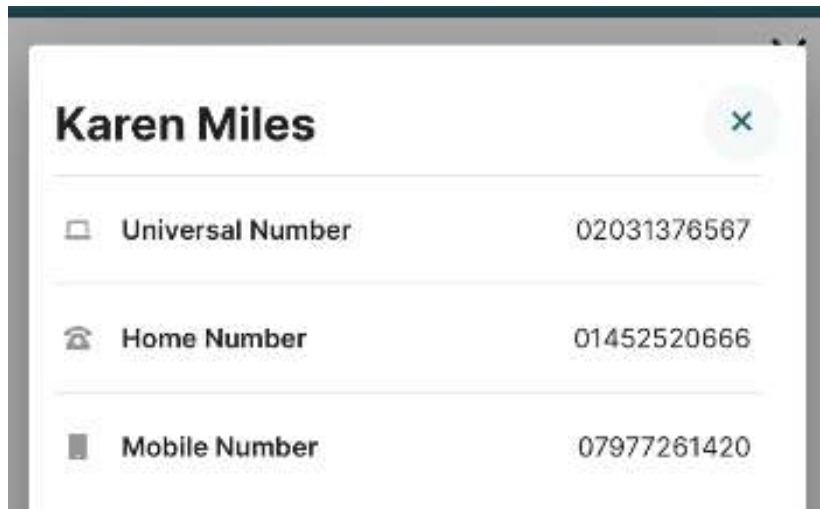
To Blind Transfer the call, that is to transfer it to another number straight away, tap the 'Blind Transfer' button.



Then, select or search for the Contact you wish to Transfer the call to, from the resulting Search Pane. You may enter alphanumeric characters. Tap the telephone number below the desired contact and Evonex Connect will transfer the call to the selected number immediately.



If more than one telephone number exists for the contact, 'Multiple' will be displayed – click the row to display all telephone numbers for the contact and select which one to transfer to. The call is transferred immediately.



Karen Miles

Universal Number	02031376567
Home Number	01452520666
Mobile Number	07977261420

When searching by telephone number, if no match is made, you may still transfer a call to the

entered number by tapping the  TRANSFER button.

Attended Transfer

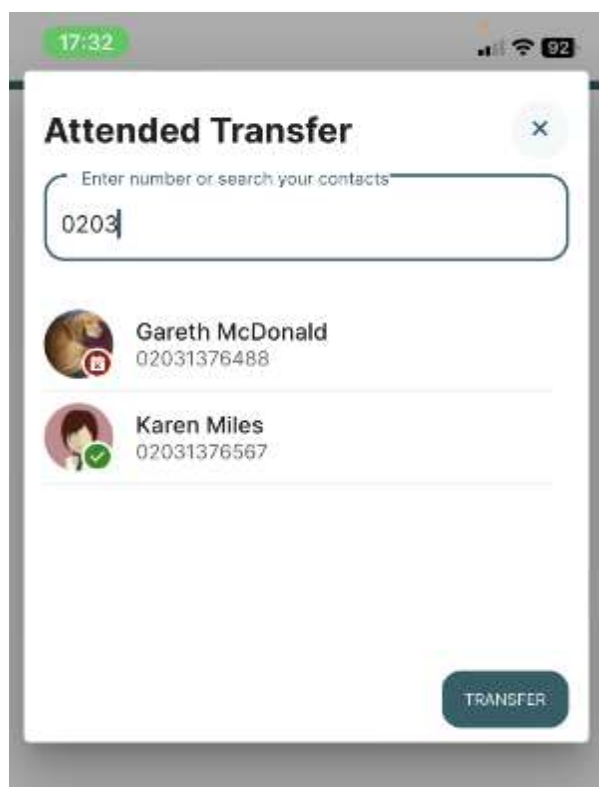
To Attended Transfer the call, that is to transfer it to another number so you can notify the destination before completing the transfer, tap the 'Attended Transfer' button.



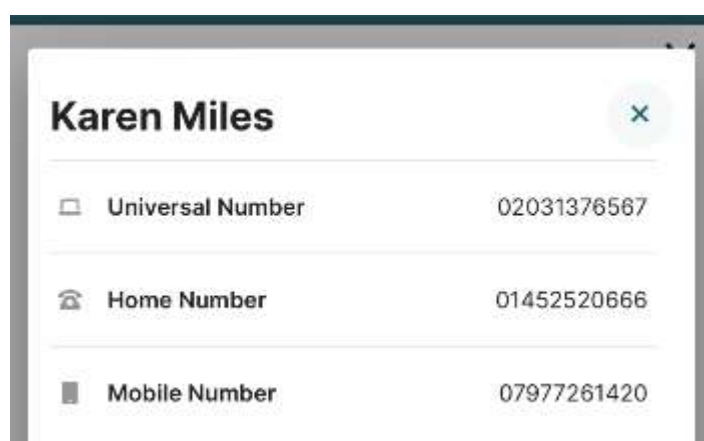
Then, select or search for the Contact you wish to Transfer the call to, from the resulting Search Pane. You may enter alphanumeric characters. Tap the telephone number below the desired contact.

When searching by telephone number, if no match is made, you may still transfer a call to the

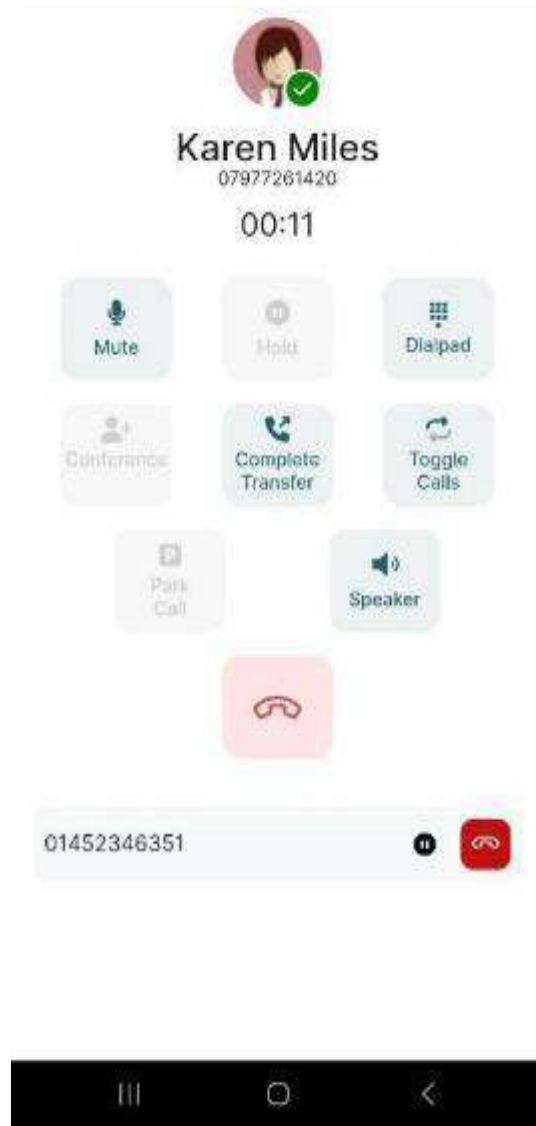
entered number by tapping the  TRANSFER button.



If more than one telephone number exists for the contact, 'Multiple' will be displayed – tap the row to display all telephone numbers for the contact and select which one to transfer to.



Evonex Connect will then place the original caller on hold and start a new call to the number you have selected. The original caller will hear hold music until the process is complete.



At this point, the original caller is shown as a single row at the bottom of the Call Control Pane. From here, you may Transfer, Hold or End the call with the buttons shown on that row. The corresponding buttons on the main Call Control Pane will now respond to the transfer destination caller, for example putting them on Hold or Ending their part of the call.



To complete the transfer, click the Complete Transfer button.



To return to the original caller, click the or Toggle Calls button, which will toggle hold between the original caller and the transfer destination.



To end the call to the original caller, click the End button on the original call row.



To end the call to the transfer destination, click the

End button on the main Call Control

Pane.

Park

Call Park is a similar feature to Hold except it places the call in a system hold location called a 'Park Bay'. These allow visual indication of Parked calls in Evonex Connect and on managed desk telephones. Your colleagues will be able to see and UnPark calls you have parked, and vice versa.

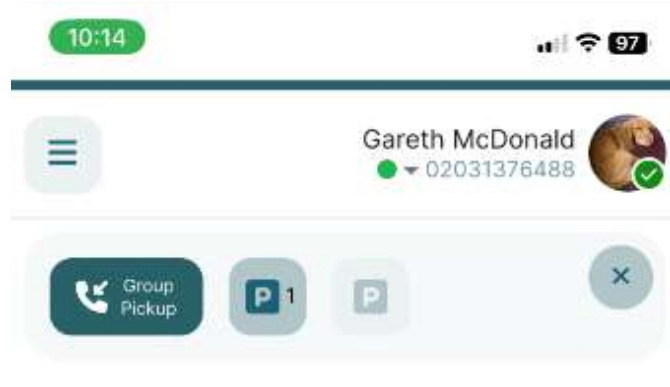
Park is therefore a useful way to move calls around the system without transferring. For example, a colleague could use their Evonex Connect to Park a call for you, send you a Chat message letting you know, then you could UnPark the call from your Evonex Connect device. You can also use Park to move calls between your own devices.



To place an active call into a Park Bay, tap the

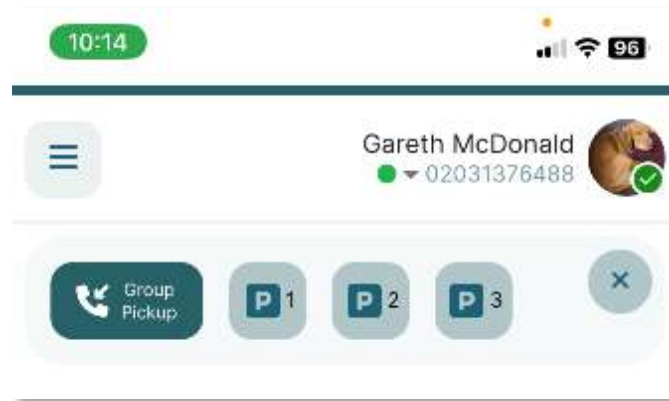
Park Call button on the Call Control Pane.

The system will place the call into the lowest available Park Bay and confirm with an audible prompt. The caller will hear hold music while Parked. You will also see the call in the Park Bay on the Dialpad or on an UnPark key on a managed desk telephone.



Click the Park Bay to UnPark the call and carry on conversation with the caller.

Two Park Bays are provided in Evonex Connect by default. If all Park Bays are in use when you Park a new call, another Park Bay will appear.



On desktop, if a call has been Parked for too long, it will automatically be presented back to the device that originally parked it. PLEASE NOTE, this is not the case on mobile devices, and the call will drop when the timer expires. Therefore, if a call is parked on a mobile device, please ensure you manually UnPark the call, or keep the mobile app awake until the timer expires.

The park expire timer that controls this is an account-wide administrator setting. An expired Parked call with either ring your Evonex Connect device until you answer, or it will automatically connect you without ringing. This is also an account-wide administrator setting.

If you would like either of these settings adjusted, please contact your support team.

Call Reconnection

During an active call, whether it is inbound or outbound, if your device's connectivity changes or degrades mid-call, Evonex Connect will attempt to reconnect the call.

In the case of a change of connectivity, for example walking out of a building while on a call connected via WiFi and the device transitions to a cellular 4G/5G connection, Evonex Connect will attempt to reconnect the call and will successfully do so when network conditions allow.

In the case of degrading connectivity, for example walking into a building while on a call connected via cellular 4G/5G data where cellular coverage is good outside but poor inside, Evonex Connect will attempt to reconnect the call but may not be able to unless the current connectivity improves or a different connectivity type is used, WiFi for example.

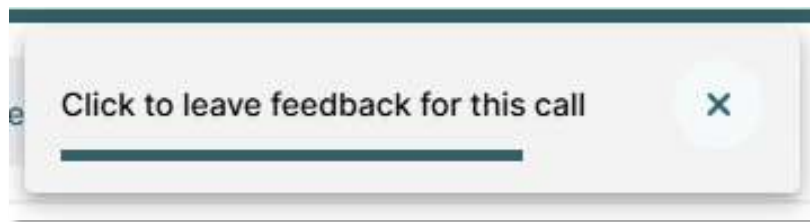
In either case, while Evonex Connect is attempting to reconnect the call, a 'Reconnecting' message will be shown on-screen. The person at the other end of the call will hear silence until the call is reconnected. If it has not been possible to reconnect the call after a given period, the call will be ended. You may also end the call manually by clicking the 'End Call' button. The call reconnection process should take less than 5 seconds if network conditions are optimum.



Call Feedback

From time to time, it may be necessary to send feedback to the Evonex Team regarding a call that has just happened. This could be because you experienced a problem with the call which requires investigation. The information sent to the Team is enough for us to identify the call in our logging and diagnostic tools, such as date, time, telephone numbers, usernames, etc, but no other personal data is sent.

When a call is ended, you will see a banner at the top of Evonex Connect prompting you to 'Click to leave feedback for this call'. The banner is shown for 5 seconds before it is automatically dismissed. You may manually dismiss the banner during this time by clicking the 'X' button.

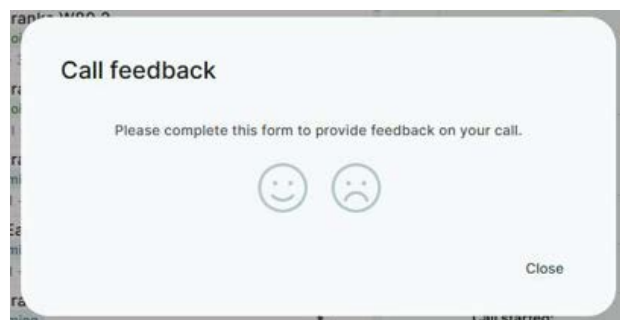


You may prevent the banner from appearing at the end of each call by going to 'Settings' > 'Notifications' and change 'Call feedback popup' to 'Disabled'.

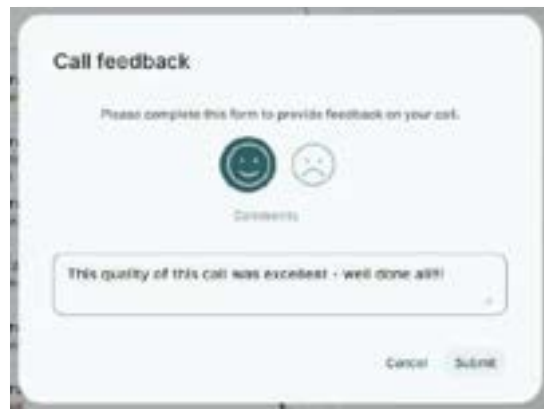


To leave feedback for a call with the banner disabled, you must click the triangle button in the top-left corner of the Call History detail pane for the relevant call. Please see the [Call History > Call Feedback](#) section for further details.

With the banner enabled, to provide feedback for the call, click the banner and the Call feedback panel will appear.



Select the happy face to provide positive feedback, enter a comment and click 'Submit'.



The 'Call feedback' form has a title 'Call feedback' and a subtitle 'Please complete this form to provide feedback on your call.' Below the subtitle are two circular icons: a green smiley face and a grey frowny face. The smiley face is selected. Below the icons is a text input field labeled 'Comments' containing the text 'This quality of this call was excellent - well done all!!'. At the bottom right are 'Cancel' and 'Submit' buttons.

Alternatively, select the unhappy face to provide feedback requiring investigation. Firstly, select an Issue type: 'Audio issue', 'Call ended unexpectedly' or 'Other'.



The 'Call feedback' form has a title 'Call feedback' and a subtitle 'Please complete this form to provide feedback on your call.' Below the subtitle are two circular icons: a grey frowny face and a green smiley face. The frowny face is selected. Below the icons is a dropdown menu labeled 'Issue type' with a list of options: 'Audio issue', 'Call ended unexpectedly', and 'Other'. At the bottom right are 'Cancel' and 'Submit' buttons.

Enter a comment and click 'Submit'.

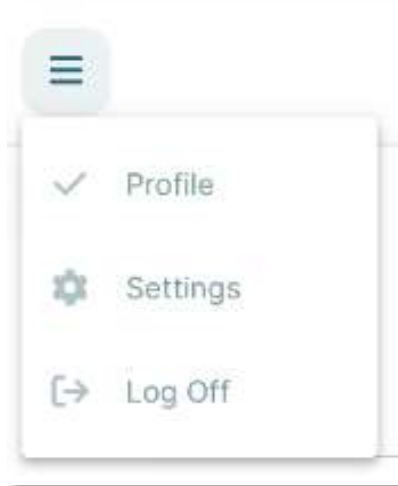


The 'Call feedback' form has a title 'Call feedback' and a subtitle 'Please complete this form to provide feedback on your call.' Below the subtitle are two circular icons: a grey frowny face and a green smiley face. The frowny face is selected. Below the icons is a dropdown menu labeled 'Issue type' with a list of options: 'Audio issue', 'Call ended unexpectedly', and 'Other'. Below the dropdown is a text input field labeled 'Comments' containing the text 'The call was approximately five minutes long and the call quality was poor for the last 30 seconds.' At the bottom right are 'Cancel' and 'Submit' buttons.

Please also contact and inform your support team, so they're able to follow-up with progress of the investigation on your behalf.

Settings

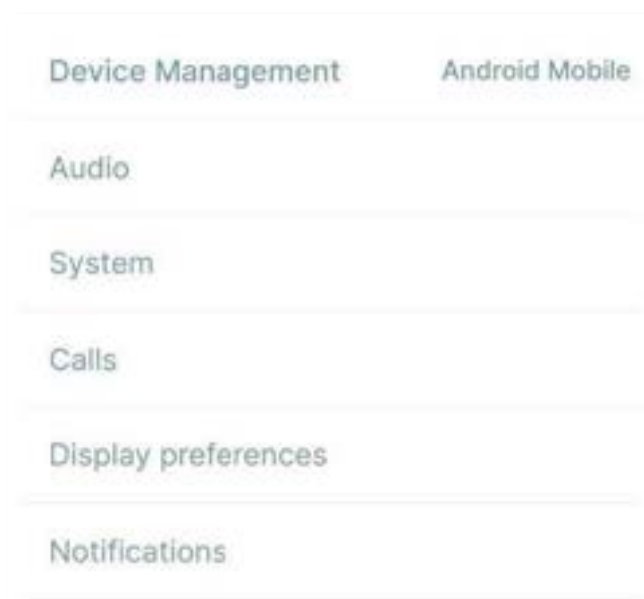
The Settings option from the Menu Options button in the top left of the app, allows you to change how Evonex Connect behaves.



Some settings are synchronised to your other Evonex Connect devices, while others are unique to each Evonex Connect device. There also some settings and diagnostic information that could be useful to your technical support team if you report a problem to them.

When a setting is changed, it is updated straight away, and a green tick  will appear to confirm the setting is saved.

Settings are sorted into the following sections: Device Management, Audio, System, Calls, Display Preferences and Notifications. Click on each section to view the relevant settings.



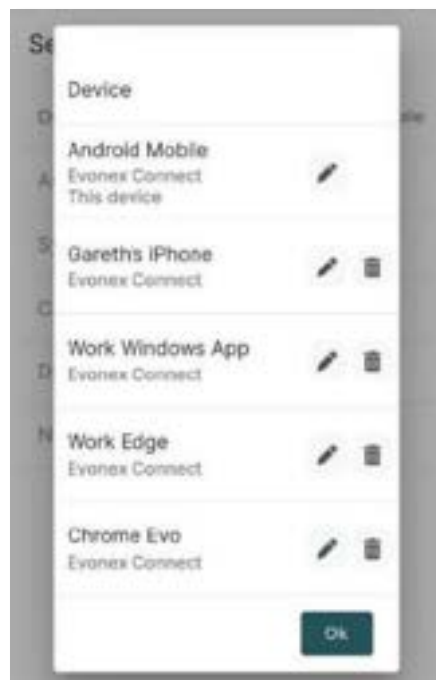
Below is a list of all Settings in the order laid out in the Settings menu. Images included for clarity. For a further explanation of each setting, please use the links below:

- [Device Management](#)
- [Audio](#)
 - [Dialpad key tones](#)
 - [Ring/Chat Notification volume](#)
 - [In-Call volume](#)
- [System](#)
 - [Send logs to server](#)
 - [Clear cache](#)
 - [App Version](#)
 - [Release Notes](#)
 - [Battery Optimisations](#)
- [Calls](#)
 - [Call waiting](#)
 - [Recent Call IDs](#)
- [Display Preferences](#)
- [Dialpad additional features initial state](#)
- [Default directory filter](#)
- [Contact list order](#)
- [Show blocked contacts](#)
- [Clock display preference](#)
- [Theme](#)
- [Dark/Light Mode](#)
- [Notifications](#)
 - [Missed call notifications](#)
 - [Voicemail notifications](#)
 - [Chat notification popup](#)
 - [Call feedback popup](#)
- [Help](#)
 - [Support](#)

Device Management

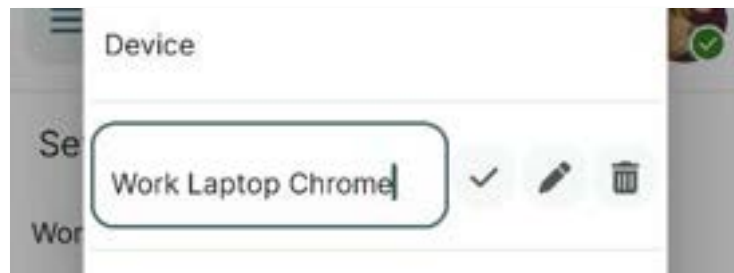
Use this to quickly and easily view the devices that you have previously given access to Evonex Connect. Each one can be identified by the friendly name you gave to it the first time you logged in on that device. The name of this device is shown to the left of the button – ‘Gareth’s iPhone’ in this

example. If you don’t recognise a device, you may delete it from here by clicking the  trash button next to the device. You may also wish to delete a device to allow a log in from another device if you already have five concurrent logins.



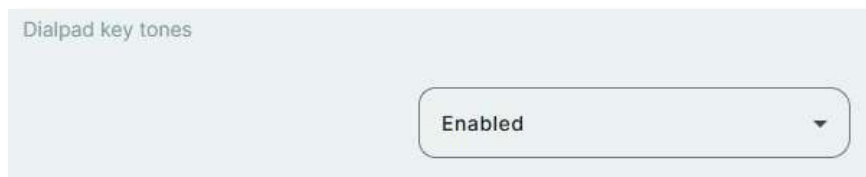
Note that you cannot delete the device you are currently logged in on. You may also not delete any desk phones that have been assigned to you. If you wish to perform this function, please contact your Support Team.

You may also rename any device to update its friendly name. Press the  Edit button, type a new friendly name and press the Tick button. Click Ok to save.



Audio

Dialpad key tones



Enable (default) or disable the tones heard when you press numbers on the dialpad.

Ring/Chat Notification volume



Adjust the slider to increase or decrease the volume of the ringtone or chat notifications. This is a per-device setting.

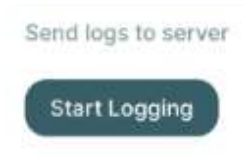
In-Call volume



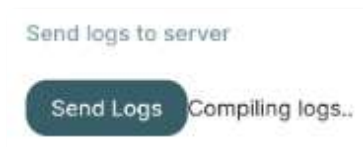
Adjust the slider to increase or decrease the volume of the call through your Headset/Speaker device. This is a per-device setting.

System

Send logs to server



Occasionally, if you're having difficulty with Evonex Connect, your Support Team may ask you to send them some log files. This is simply done by clicking the 'Start Logging' button, perform the task you're having difficulty with and then clicking the 'Send Logs' button.



Clear cache



Occasionally, your Support Team may ask you to Clear the cache within Evonex Connect. Click this button to do so.

App Version



The current version of Evonex Connect running on your device.

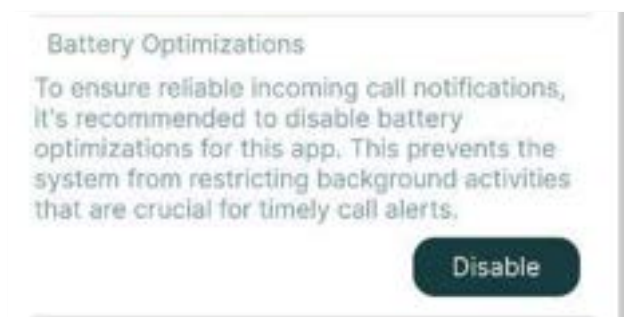
Release Notes



Click the 'Show' button to read the release notes for the latest version of Evonex Connect. You can also navigate to the release notes for previous versions. Also included are links to our FAQs, Privacy Policy, Terms & Conditions and System requirements.



Battery Optimisations (Android only)



Tap the 'Disable' button to prevent your device from restricting background activities that are crucial for timely call alerts.

Calls

Call waiting



Enable or disable the tone and visual indication of a call waiting to be answered while you are already on a call. When enabled, you have 20 seconds (default) to answer the waiting call. When disabled, the call will follow your call divert setting or route to your voicemail. This is a per-device setting.

Recent Call IDs



The last three call IDs are listed here. Your support team may occasionally ask you to copy and send them one or more call IDs to help them diagnose any issues with Evonex Connect.

Display Preferences

Dialpad additional features initial state



Choose whether the Park Bays and Group Pick button are displayed on the Dialpad by default or if they are hidden. This is a per-device setting.

Default directory filter



Choose which directory you want to search within by default – Directory (internal), Shared (global, set by the admin), Personal (added by you), or All (a combination of all three, default). This setting is synchronised to your other Evonex Connect devices.

Contact list order

A screenshot of a settings card titled 'Contact list order'. It features a dropdown menu with the text 'Alphabetical - First Name' and a downward-pointing arrow on the right.

Change between sorting Contacts alphabetically by first or last name. This setting is synchronised to your other Evonex Connect devices.

Show blocked contacts

A screenshot of a settings card titled 'Show blocked contacts'. It features a dropdown menu with the text 'Show' and a downward-pointing arrow on the right.

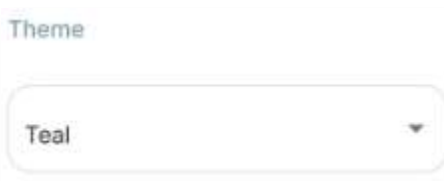
Choose whether to show or hide contacts that have been blocked. This setting is synchronised to your other Evonex Connect devices.

Clock display preference

A screenshot of a settings card titled 'Clock display preference'. It features a dropdown menu with the text '24 Hour' and a downward-pointing arrow on the right.

Choose whether you'd like to see time stamps in 12-hour or 24-hour time format. This setting is synchronised to your other Evonex Connect devices.

Theme

A screenshot of a settings card titled 'Theme'. It features a dropdown menu with the text 'Teal' and a downward-pointing arrow on the right.

Choose from 13 colour schemes. This setting is synchronised to your other Evonex Connect devices.

Dark/Light Mode



Choose whether the app runs in Light mode (default) or Dark mode. This setting is synchronised to your other Evonex Connect devices.

Notifications

Missed call notifications



Select whether to Enable or Disable the notification popup when you miss a call. This is a per-device setting.

Voicemail notifications



Select whether to Enable or Disable the notification popup when you receive a new Voicemail message. This is a per-device setting.

Chat notification popup



Select whether to Enable or Disable the notification popup when you receive a new Chat message. This is a per-device setting.

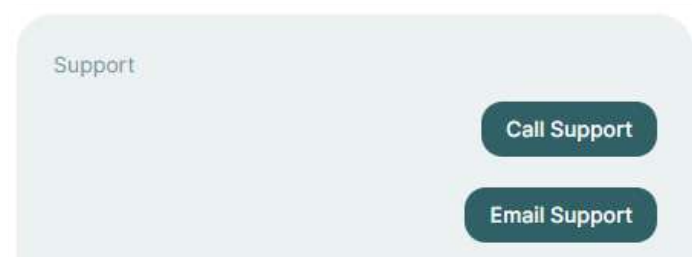
Call feedback popup



You may prevent the Call feedback banner from appearing at the end of each call by going to 'Settings' > 'Notifications' and change 'Call feedback popup' to 'Disabled'.

Help

Support



Handy buttons to facilitate contacting your provider's support team for technical assistance.

Schools & Education Addendum

This section of the Evonex Connect user guide is dedicated to Schools and Education Establishments. We will detail the features developed with the specific requirements of Schools and Education Establishments in mind. To aid explanation of the features, we will use screenshots from Evonex Connect when integrated with both Arbor and Bromcom Management Information Systems.

MIS Integration

Management Information Systems, also known as MISs, are education IT systems that aim to help schools improve their productivity and reduce manual repetitive work. They do this by enabling staff to automate different processes. They also provide tools to facilitate reporting on various criteria and easily track factors like student attendance, safeguarding issues and parent/guardian interactions.

Any given MIS will contain a database of contacts including students, parents/guardians, staff, suppliers, etc, and their personal information like address, job title, email address and telephone number.

MIS systems and Evonex Connect

In essence, integration between Evonex Connect and a given MIS allows access to the MISs database of contacts within Evonex Connect.

The integration itself makes use of the MIS provider's API (Application Programming Interface) to allow bi-directional communication between Evonex Connect and the provider. Integration is primarily designed to facilitate telephony interactions with the contacts in the MIS database. These interactions can include:

- Making telephone calls directly from the MIS (Click-to-dial)
- Automatically displaying the MIS contact page when they call you, or you call them (Screen-pop)
- Searching for MIS contacts directly within Evonex Connect (Contact search)
- Displaying the MIS contact page after searching for the MIS contact in Evonex Connect (Screen-pop from contacts)
- Displaying the MIS contact page for a call (missed, incoming or outgoing) that has already happened (Screen-pop from call history)
- Displaying the MIS contact page for a voicemail message left by a caller (Screen-pop from voicemail)
- Court Order notifications for incoming and outgoing calls, and from contacts, call history and voicemail
- Safeguarding incident reporting for incoming and outgoing calls, and from call history (not missed) and voicemail.

As of October 2025, Evonex Connect integrates with the following MIS providers. There are varying interactions available, depending on the provider - the tables below detail the interactions available with each.

Interactions - October 2025	MIS Provider		
	Arbor MIS	Bromcom MIS	CPOMS
Click-to-dial	Yes	Yes	Yes
Screen-pop for incoming calls	Yes	Yes	N/A
Screen-pop for outgoing calls	Yes	Yes	N/A
Screen-pop from contacts	No	Yes	N/A
Screen-pop from call history	Yes	Yes	N/A
Screen-pop from voicemail	Yes	Yes	N/A
Contact search	No	Yes	N/A
Court order notifications for incoming calls	Yes	Yes	N/A
Court order notifications for outgoing calls	Yes	Yes	N/A
Court order notifications from contacts	No	Yes	N/A
Court order notifications from call history	Yes	Yes	N/A
Court order notifications from voicemail	Yes	Yes	N/A
Safeguarding incident reporting for incoming calls	N/A	N/A	Yes
Safeguarding incident reporting for outgoing calls	N/A	N/A	Yes
Safeguarding incident reporting from call history	N/A	N/A	Yes
Safeguarding incident reporting from voicemail	N/A	N/A	Yes

Please note, providers and interactions will be expanded in due course.

MIS integrations are configured, enabled and disabled by your administrator. Multiple MIS providers may be configured concurrently; therefore, it is possible to see multiple contact matches from multiple MISs when you receive an incoming call, make an outgoing call, search for a MIS contact, view a call history entry, or access a voicemail message.

The first 100 contacts from each of your configured MISs are cached and shown in alphabetical order in the Evonex Connect Contacts list pane by default. When you search for a contact by name or number, this triggers a query of the entire MIS database, and the relevant matches will be displayed.

The Windows or macOS desktop versions of Evonex Connect are required for Click-to-dial. Screen popping and Contact search are available in the Web browser, Windows and macOS versions of Evonex Connect.

Click-to-dial from your MIS (or any Website)

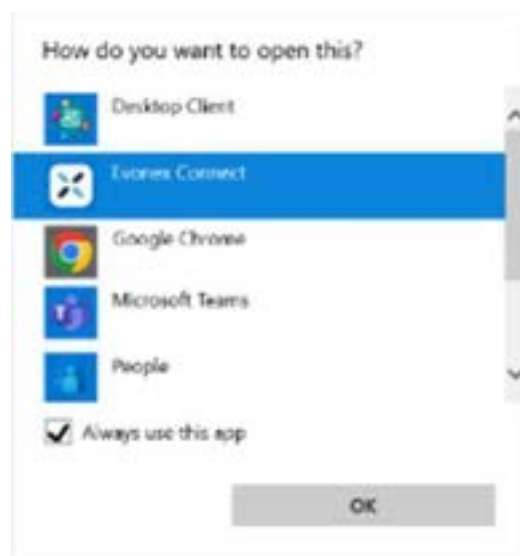
Using the Windows or macOS apps, you can make calls simply by clicking on a telephone number. To do this, it is necessary to register Evonex Connect in your computer's operating system as the default application for the TEL: protocol. This means that any number your computer recognises as formatted as a TEL: link becomes dialable through Evonex Connect. Typically, telephone numbers on websites and email footers, among others, are formatted as TEL: links.

Setup on a Windows computer

To set Evonex Connect as the default app for making telephone calls when you click on hyperlinked numbers, go to 'Settings > Miscellaneous > Call with Evonex when clicking hyperlinked numbers' and click the 'Set As Default' button.



You'll be presented with a dialogue window similar to the one below. Select 'Evonex Connect' from the list, tick the 'Always use this app' check box, then click 'OK'.



The Call with Evonex when clicking hyperlinks button will change to 'Registered' and become greyed out.

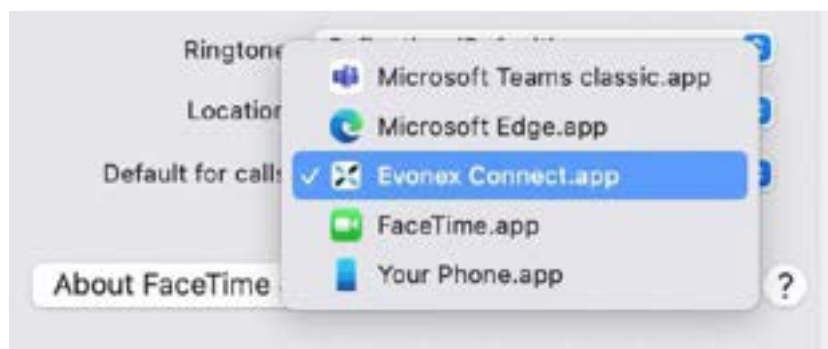
Call with Evonex when clicking hyperlinks

Registered

Setup on a macOS computer

When clicking on telephone number links on a Mac, FaceTime is the default application that is configured to call the clicked number. To make Evonex Connect the default calling app, follow these steps:

6. Open the "FaceTime" app.
7. From the application menu, click "FaceTime" and then choose "Preferences."
8. In the "Preferences" window, select the "Settings" tab.
9. Change the "Default for calls" option by using the dropdown list to select 'Evonex Connect'.
10. You can now close preferences and FaceTime.



Setting up the Browser Click-to-dial extension

Some websites or web-based MISs will contain telephone numbers that are not formatted as TEL: links. To allow these numbers to be dialable via the Evonex Connect Windows or macOS apps, we have developed an 'extension' for the Chrome web browser. This extension aims to detect or identify any UK telephone number that is present on a webpage or web-based MIS and place an

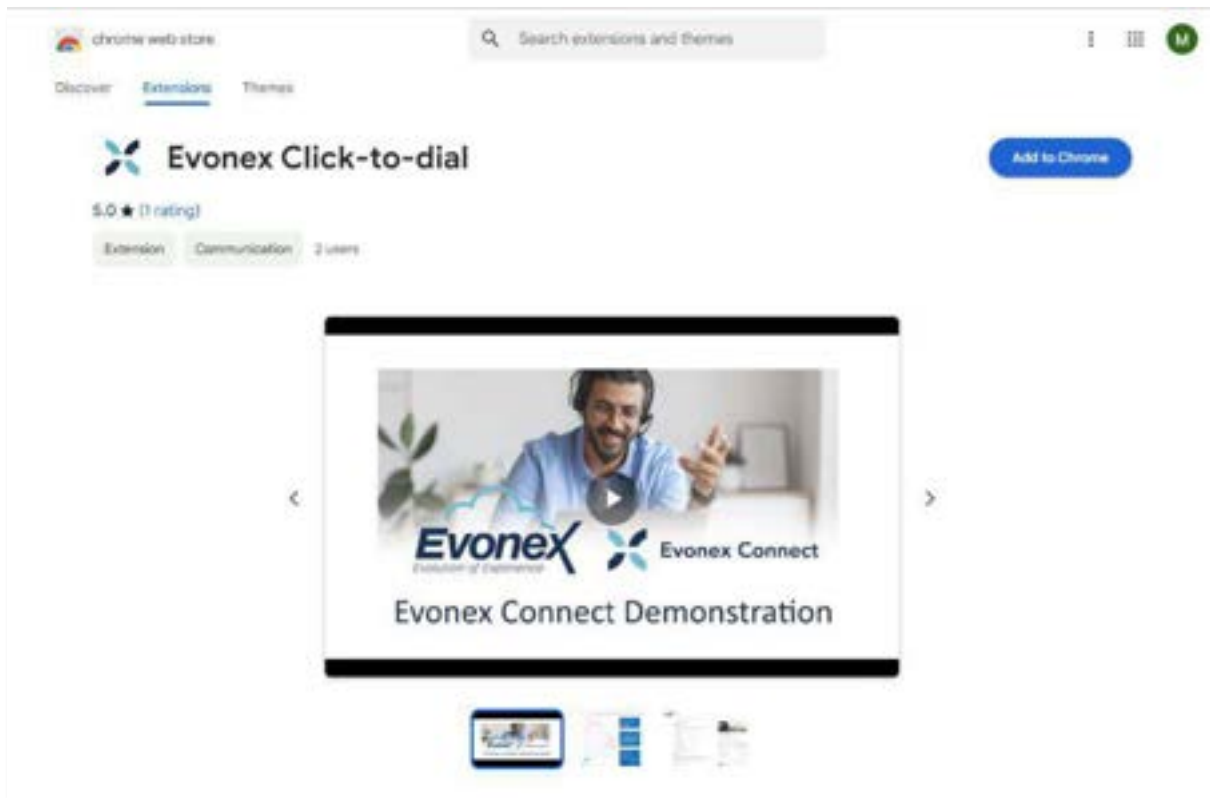
Evonex Connect logo  next to it. When you see the logo, you can click it to dial the identified telephone number.

The extension can be easily installed in your browser by opening Evonex Connect and navigating to 'Settings > Help > Evonex Connect Browser Extension' and clicking the 'Chrome' button.



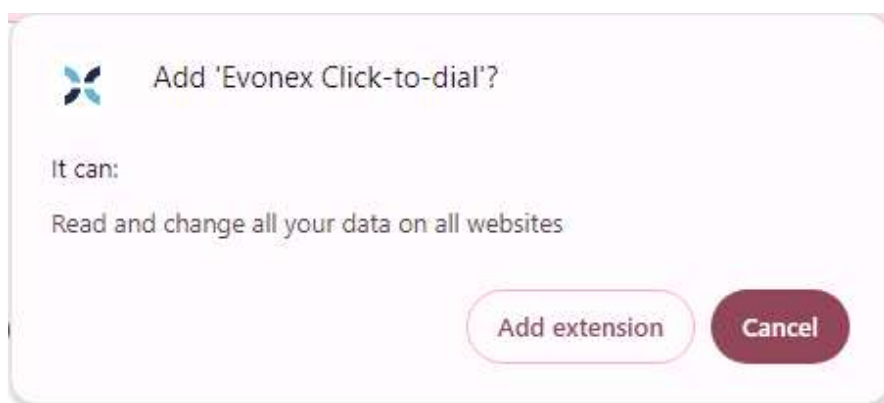
You may also click this direct link: [Evonex Click-to-dial](#).

After clicking the button/link, the extension's web store page will be shown. Click the 'Add to Chrome' button.

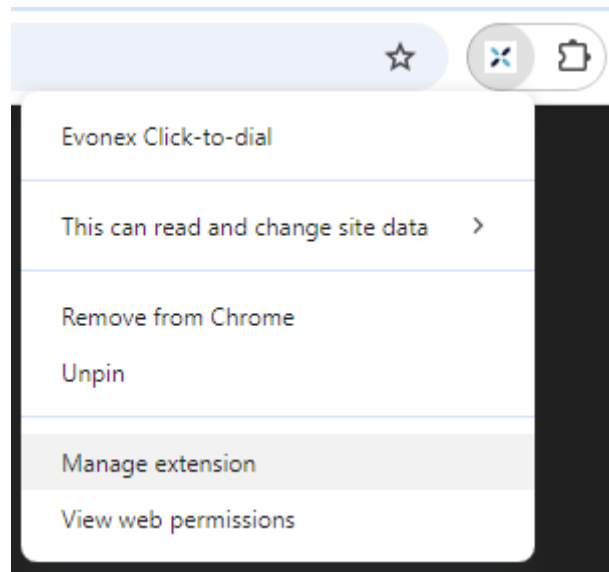


Confirm you're happy that the extension can read and change all your data on all websites by clicking 'Add extension'.

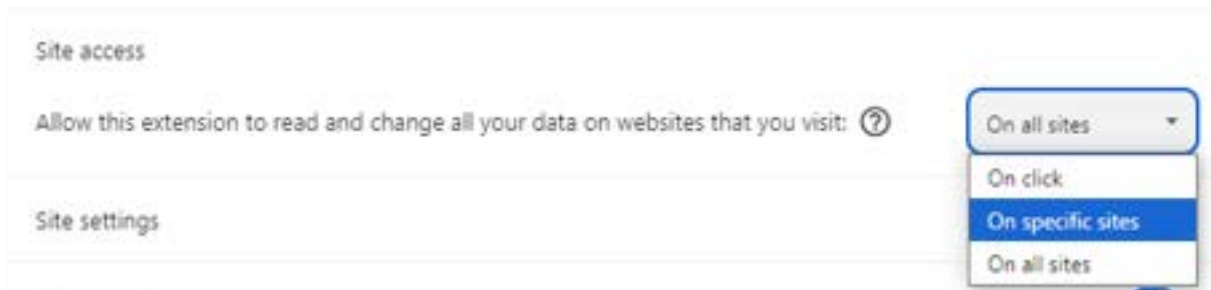
Please note, this is only for the purpose of identifying telephone numbers on websites you visit. We do not collect your browsing data.



If you wish to modify which websites the extension has access to, go to the 'Manage extension' menu option



Change the 'Allow this extension to read and change all your data on websites that you visit' setting to 'On specific sites'



Then add the website addresses that you wish the extension to have access to

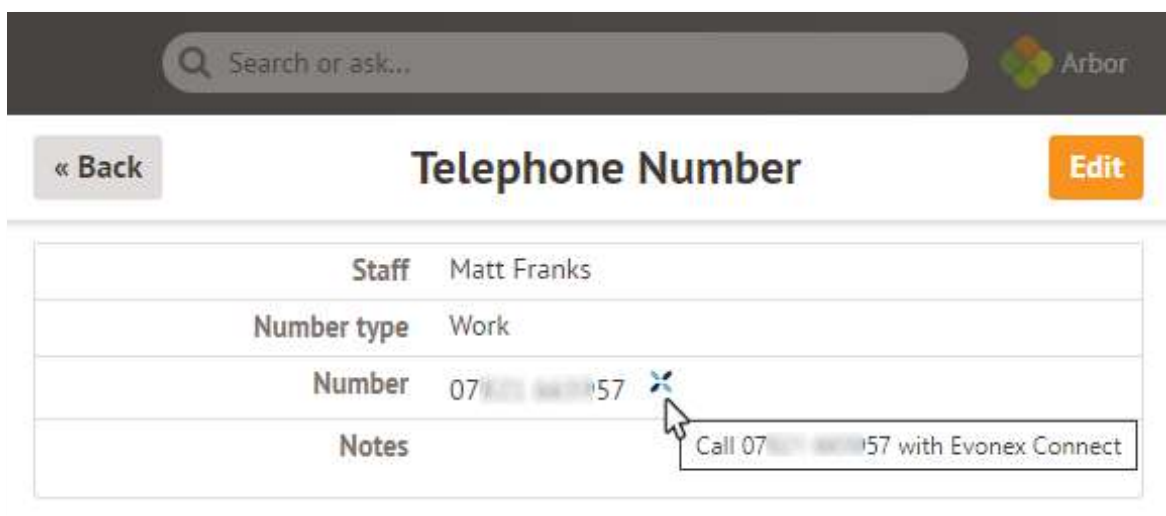


Using Click-to-dial

As previously mentioned, the click-to-dial feature requires either the Windows or macOS Evonex Connect app and allows you to make calls from within your MIS, or any website, with a simple click.

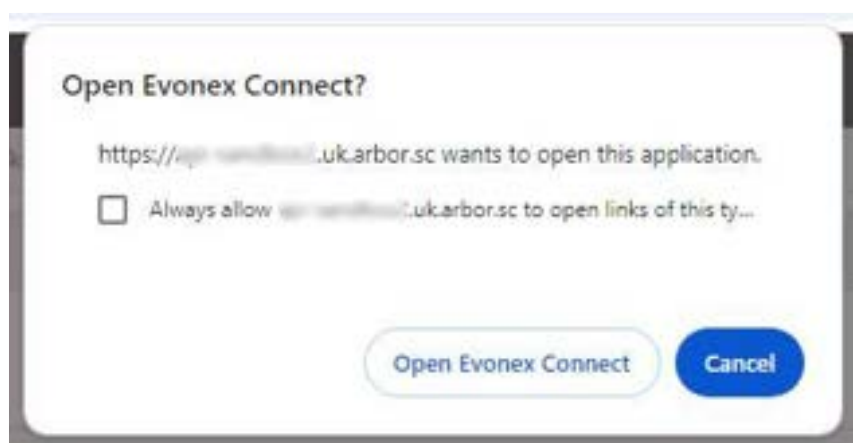
Different websites or MISs will indicate that a number is dialable in different ways. For example, some may have specific 'call' buttons, while others may underline the telephone number and make it appear like a hyperlink.

For any UK telephone numbers that the Evonex Connect browser extension can identify, it places the Evonex Connect logo next to any telephone number which indicates that you can click it to make a call to the number. This includes those already formatted as TEL: links and those that may already have 'dial' buttons or are underlined.

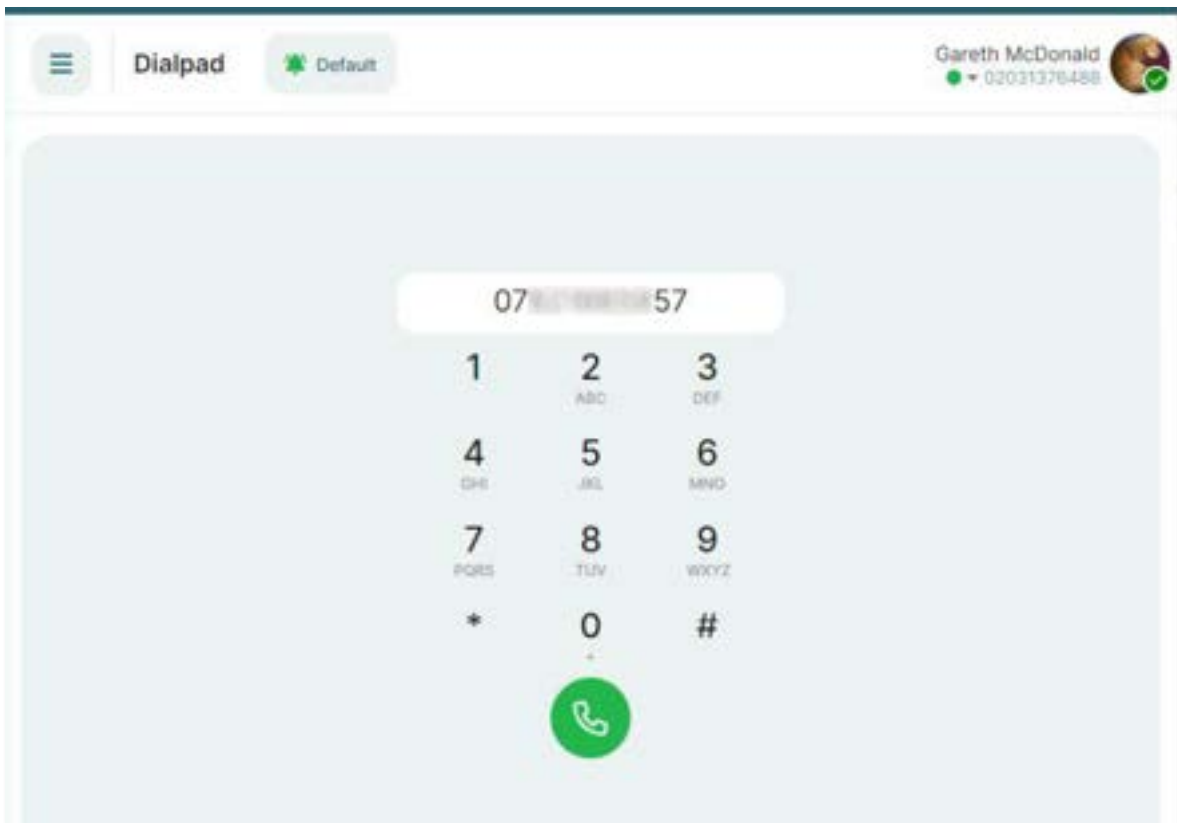


Example: Arbor, School MIS

When you click a telephone number in your MIS or a website, or click a 'dial' button, or click the Evonex Connect logo, a popup will ask you to allow Evonex Connect to be opened. Tick the 'Always allow...' checkbox to avoid repeatedly being asked for this MIS or website. Click 'Open Evonex Connect'.



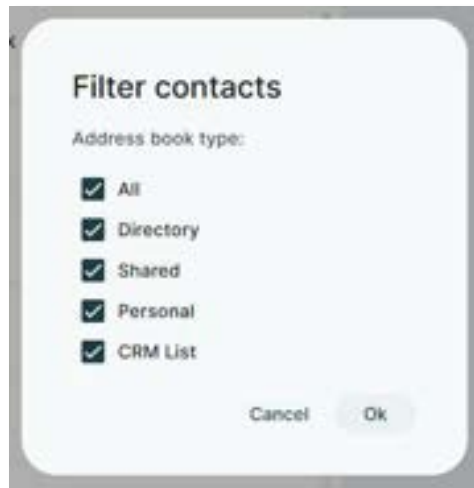
Evonex Connect will open or jump to the foreground and the telephone number you clicked will be added to the Dialpad. Click the green 'dial' button to make the call.



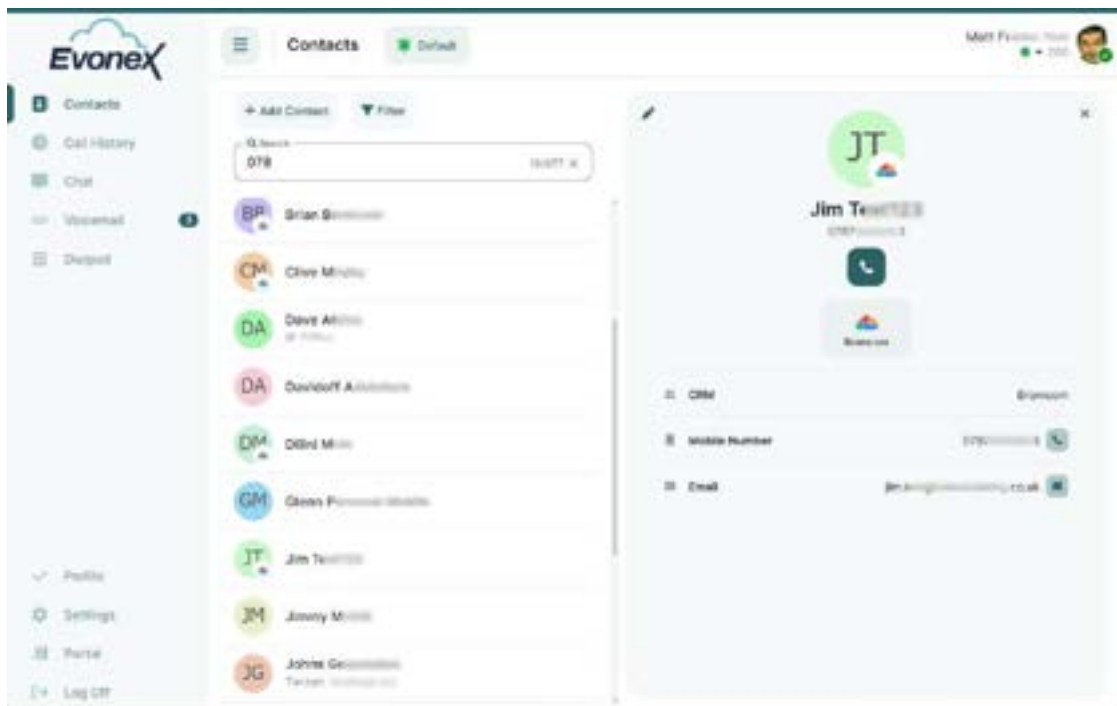
Search for contacts within your MIS

For more information on filtering within different Contact directories, please review [the Contacts section](#) of this manual.

Most MIS systems allow their databases to be searched from within Evonex Connect. For more details, see the [MIS and Evonex Connect](#) section. You may search by contact name, telephone number, company, email, etc, and return all matched results to the application. In the Contact menu, click the 'Filter' button and select either 'All' or 'CRM List' and click 'Ok'



Enter your search criteria in the 'Search' field and the contacts contained within your MIS that match your search will be displayed.



Example of a contact search result returned from Bromcom MIS and other directories

Select a contact from the context pane to view its details.

You may call the contact's main telephone number by clicking the  'call' button.

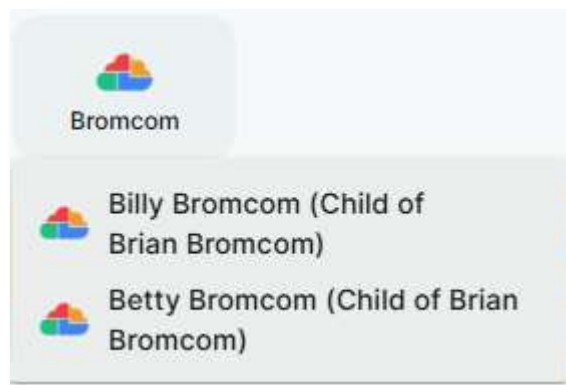
You may call one of the contact's other telephone numbers by clicking the  'call' button.

You may screen-pop the contact in the MIS by clicking the  'edit' button.

You may view other MIS contacts that match the same telephone number or are associated with the contact, by clicking the button labelled with your MIS. Each of the resulting contact names shown can be clicked to screen-pop that contact in the respective MIS:



Example of Arbor associated contacts



Example of Bromcom associated contacts

Please note, there may be a short delay before the MIS button is displayed. This is due to the MIS provider's API, of which we have no control.

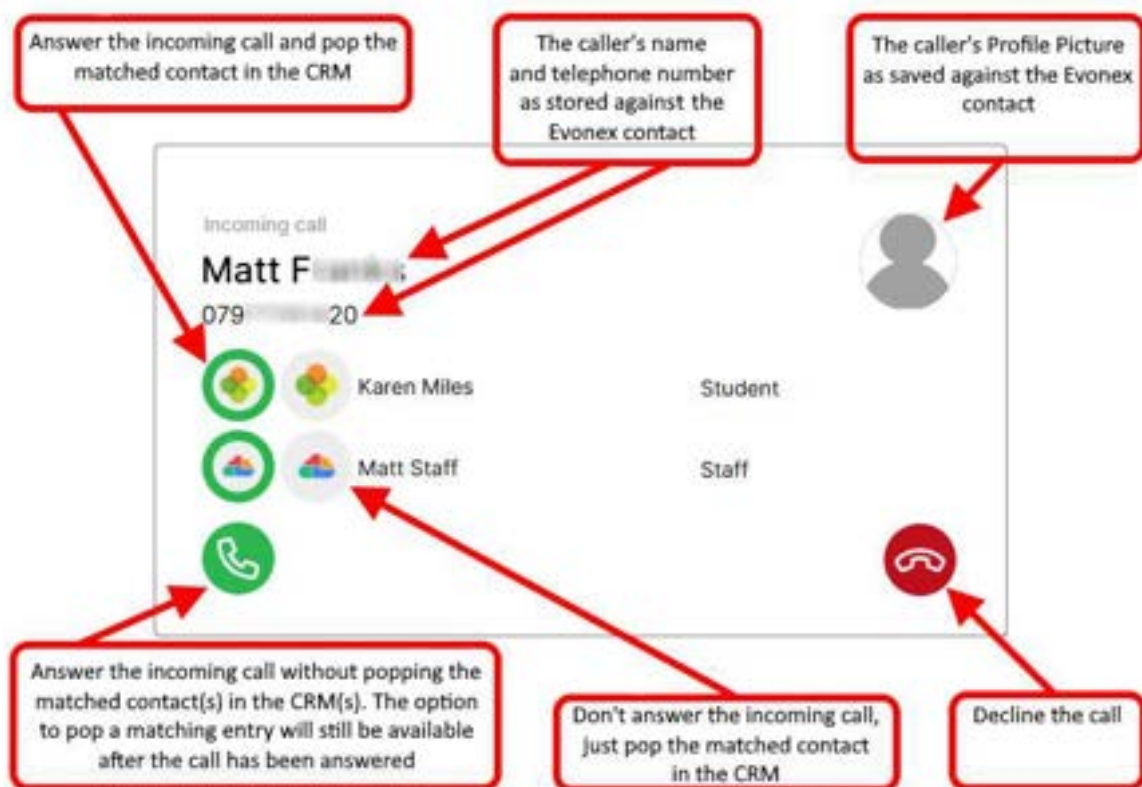
Screen-pop of your MIS

When you receive a call

When you receive an inbound call to your telephone number, and Evonex Connect is minimised or in the background, you will see a pop-up notification on-screen. Please review the [Receive a call section](#) for more details.

When you click on the notification and Evonex Connect is maximised on-screen, you will see the caller's number, as well as their name and profile picture if they have been saved as an Evonex contact. The green 'Answer' and red 'Reject' buttons are displayed as in the image below. Answering the call shows it as active (or connected) and brings the Call Control Pane into view – see the [When the call is connected section](#). Rejecting the call will send the caller to your Voicemail, by default.

You will also see the name and contact type of each matched entry in each of your configured MISs. Next to them are a pair of buttons which contain the logo of the MIS that contact has been matched within. The left-hand button, with a green halo, will answer the call and pop the MIS contact. The right-hand button, without a halo, will just pop the MIS without answering the call.



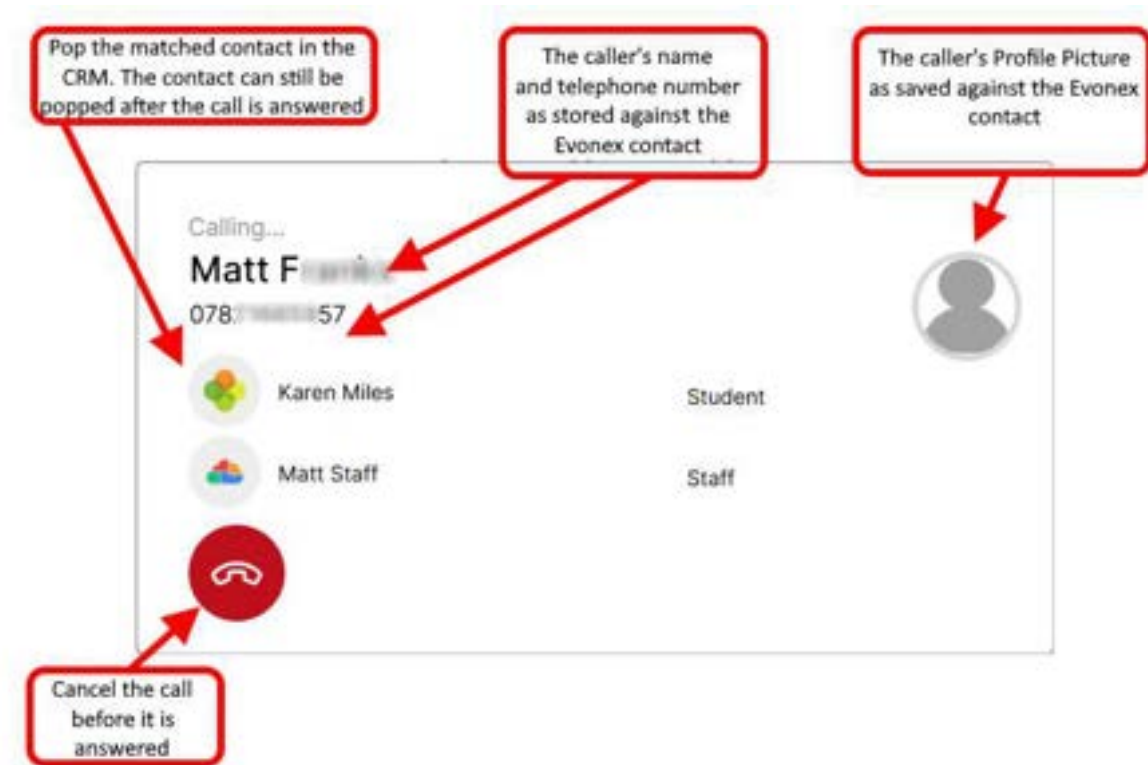
Please note, there may be a short delay before all matched results are displayed. This is due to the MIS provider's API, of which we have no control.

When you make a call

When you make an outbound call you will see the dialled number, as well as their name and profile picture if they have been saved as an Evonex contact. The red 'Cancel' button is displayed as in the image below – click it to stop making this outbound call.

You will also see the name and contact type of each matched entry in each of your configured MISs. Next to them is a button which contains the logo of the MIS that contact has been matched within. Click this button to pop the contact in the MIS before it has been answered (while it is still ringing).

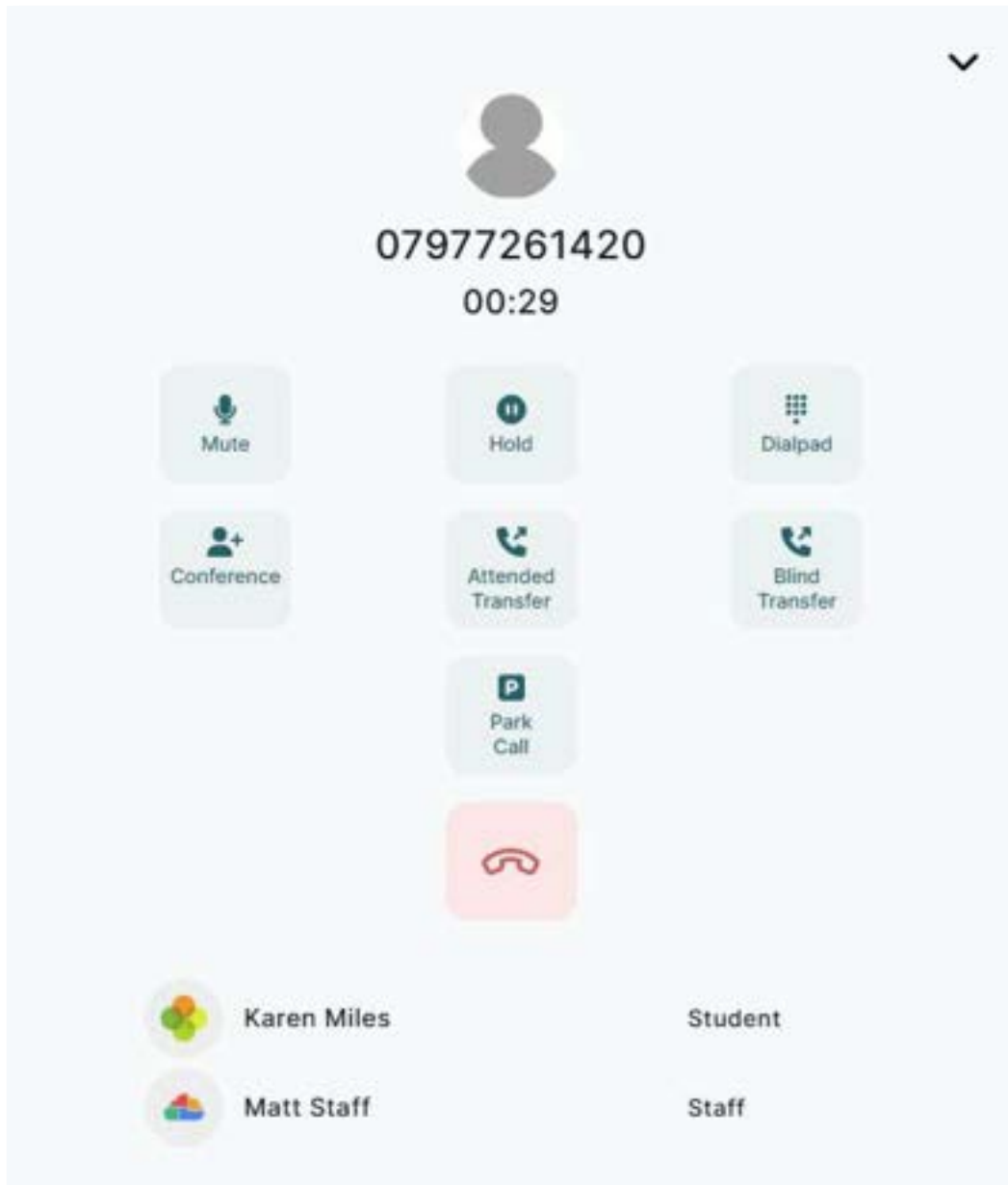
When the call has been answered, the call shows as active (or connected) and brings the Call Control Pane into view – see the [When the call is connected section](#).



Please note, there may be a short delay before all matched results are displayed. This is due to the MIS provider's API, of which we have no control.

When the call is connected

When your call is connected, the Call Control Pane appears. The Call Control Pane allows you to perform such tasks as hold, transfer and park the call. For more details, please refer to the [Call Control Pane](#) section.

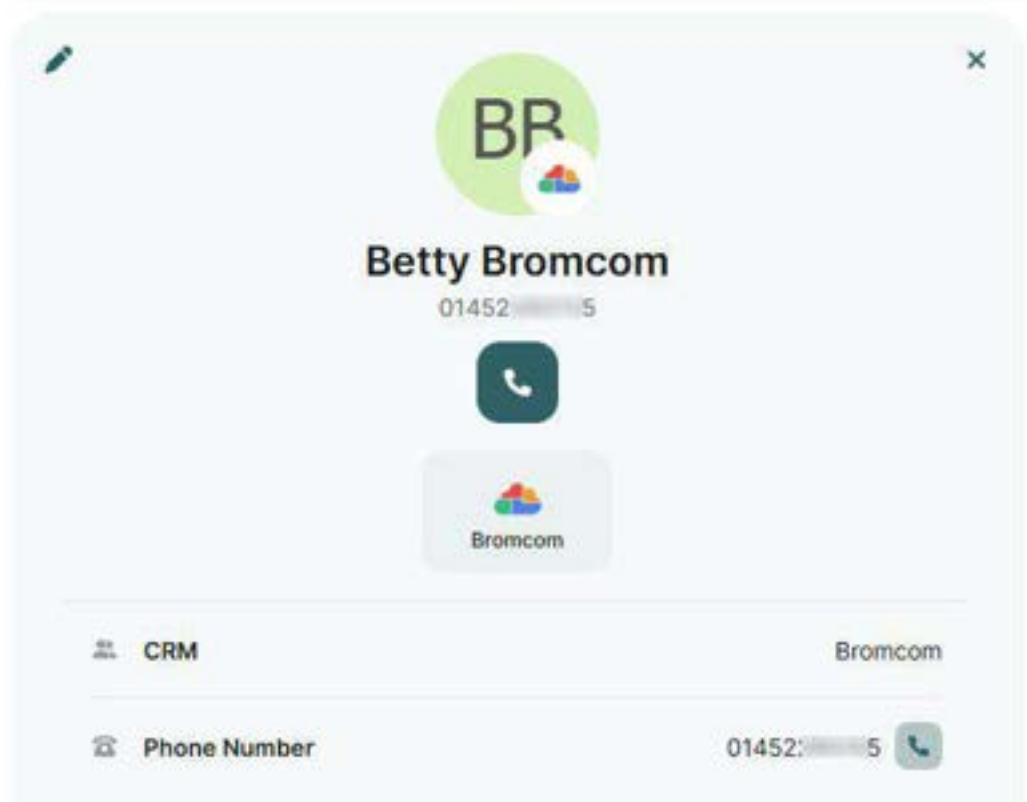


Below the call control buttons, you will also see a button for each contact match in each MIS you have configured. Each button contains the logo of the MIS that contact has been matched within. Click the button to pop the contact in the MIS.

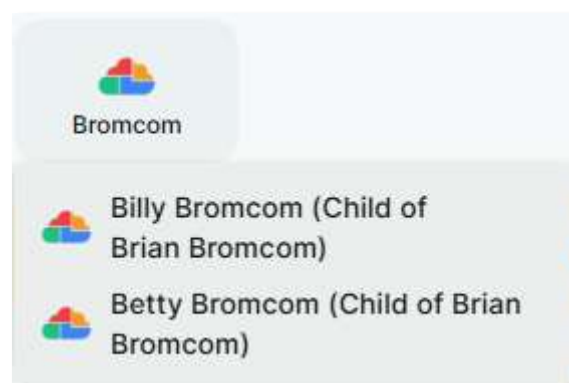
Please note, there may be a short delay before all matched results are displayed. This is due to the MIS provider's API, of which we have no control.

From Contacts

You may screen-pop a MIS contact directly from the Contacts detail pane. Search for a contact then Select an entry in the Contact list to view its details. For more details, please see the [Contacts](#) section.



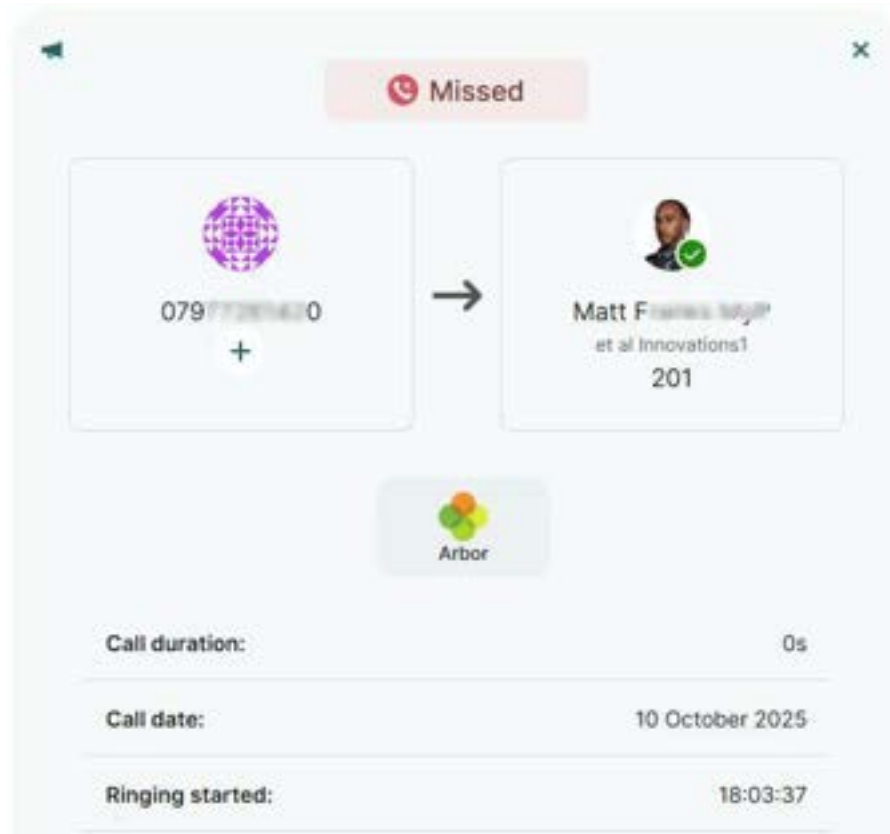
Click the button labelled with your MIS (Bromcom in this example). Multiple contacts may be shown depending on the MISs which your admin has configured for you. Each of the resulting contact names shown can be clicked to screen-pop that contact in the respective MIS.



Please note, there may be a short delay before the MIS button is displayed. This is due to the MIS provider's API, of which we have no control.

From Call History

You may screen-pop a MIS contact based on your incoming, outgoing and missed call history entries. Select an entry in the Call History list to view the detail of the call. For more information, please see the [Call History](#) section.



Click the button labelled with your MIS (Arbor in this example). Multiple contacts may be shown depending on the MISs which your admin has configured for you. Each of the resulting contact names shown can be clicked to screen-pop that contact in the respective MIS



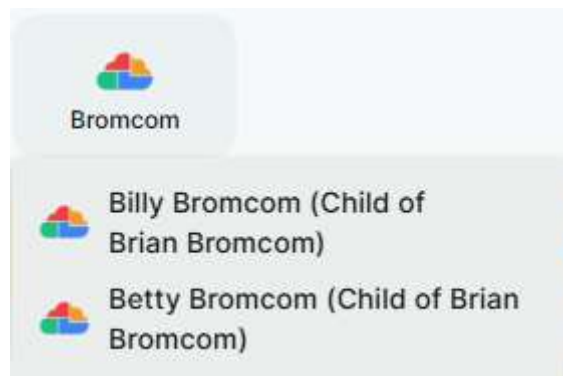
Please note, there may be a short delay before the MIS button is displayed. This is due to the MIS provider's API, of which we have no control.

From Voicemail

You may screen-pop a MIS contact based on your voicemail messages. Select an entry in the Voicemail list to view the detail of the message. For more details, please see the [Voicemail](#) section.



Click the button labelled with your MIS (Bromcom in this example). Multiple contacts may be shown depending on the MISs which your admin has configured for you. Each of the resulting contact names shown can be clicked to screen-pop that contact in the respective MIS.

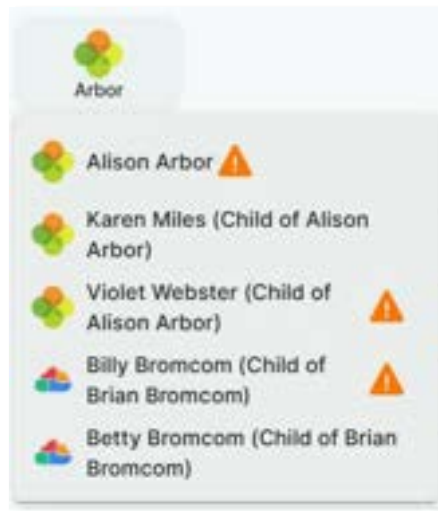


Please note, there may be a short delay before the MIS button is displayed. This is due to the MIS provider's API, of which we have no control.

Court Order notifications

For various legal reasons, a parent/guardian can sometimes have a Court Order added to their contact record in the MIS. This Court Order will also be linked to an associated child or children.

In Evonex Connect whenever there is an interaction with a contact that has a Court Order, an orange caution triangle will be shown next to the contact, and in some cases, the background will be yellow. These are there to draw your attention and alert you, so that you proceed with caution when speaking to this caller.



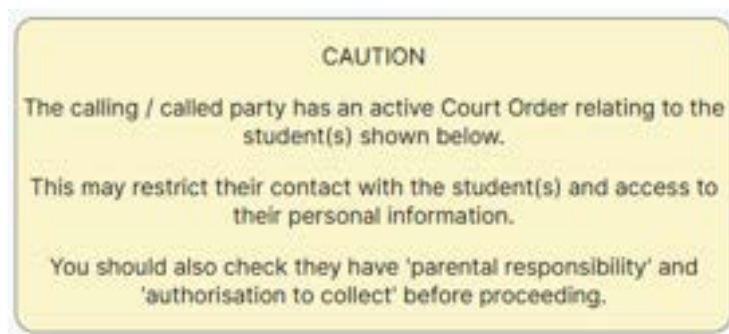
The specific interactions where you may see a caution triangle are:

- [For an incoming ringing call](#)
- [For an outgoing ringing call](#)
- [For a connected call](#)
- [On a Contact](#)
- [On a Call History entry](#)
- [On a Voicemail message](#)

A detailed explanation of each will be given in the sections below.



You may also see a circular button with an orange caution triangle within. Click this to toggle the expansion of a yellow panel with text explaining the significance of the triangle.

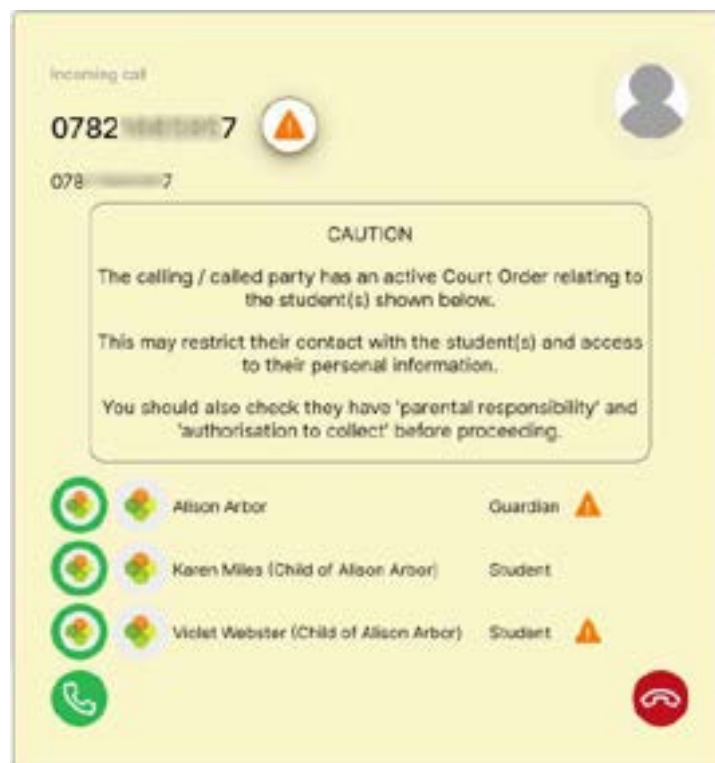


For an incoming ringing call

Below is an incoming call example using Arbor MIS where the active call pane is showing a ringing call from a mobile number. Evonex Connect has determined that this number belongs to a parent/guardian called Alison Arbor. It has also determined that Alison has two children at the school; Karen Miles and Violet Webster. The background is yellow and there are Caution triangles to alert you to the fact that something is out of the ordinary for this caller.



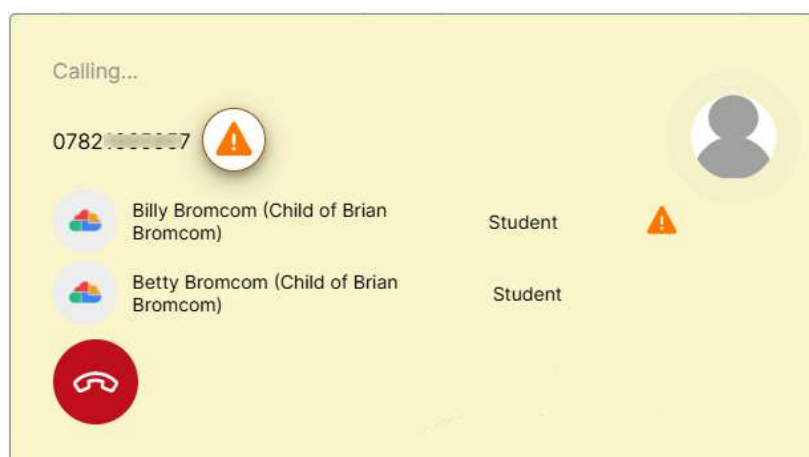
Clicking the circular caution triangle button next to the number at the top, will expand a text box which explains that Alison has a Court Order against them. The other triangles next to each name indicate that Alison's Court Order relates to their child Violet, but not to their other child Karen. These triangles are not buttons and have no function when clicked.



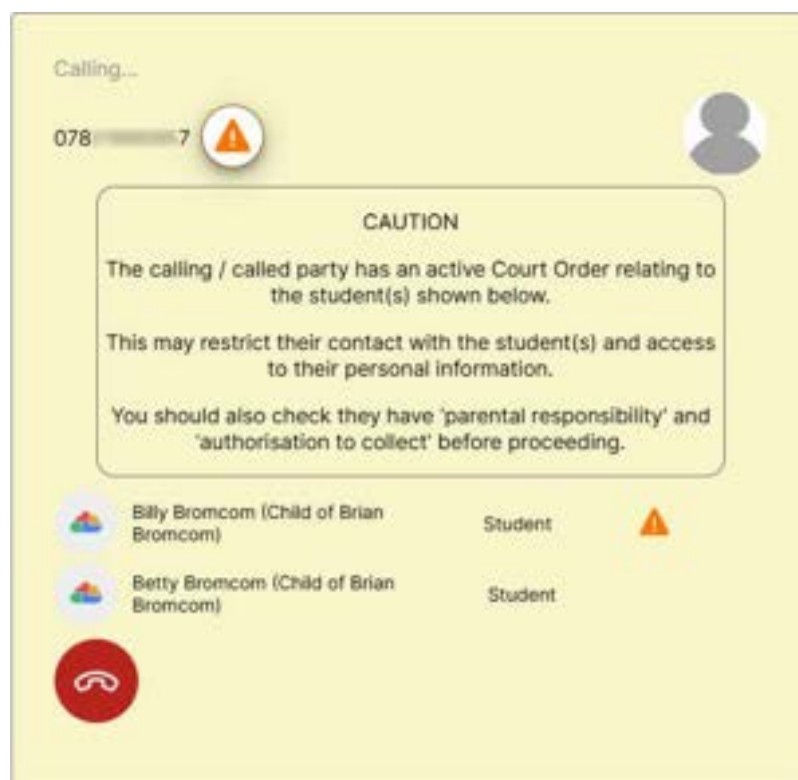
The other buttons on the pane function in the same way as described earlier in this section.

For an outgoing ringing call

Below is an outgoing call example using Bromcom MIS where the active call pane is showing a ringing call to a mobile number. Evonex Connect has determined that this number belongs to a parent/guardian called Brian Bromcom. It has also determined that Brian has two children at the school; Billy Bromcom and Betty Bromcom. The background is yellow and there are Caution triangles to alert you to the fact that something is out of the ordinary for this caller.



Clicking the circular caution triangle button next to the number at the top, will expand a text box which explains that Brian has a Court Order against them. The other triangles next to each name indicate that Brian's Court Order relates to their child Billy, but not to their other child Betty. These triangles are not buttons and have no function when clicked.



The other buttons on the pane function in the same way as described earlier in this section.

For a connected call

There is similar functionality available when the call is connected (incoming or outgoing). The example below shows Arbor MIS but functionality, but Bromcom MIS functionality is the same.



Use the circular caution triangle toggle button to expand the text box explaining that a Court Order exists for the caller/callee. This overlays the call control buttons, click the circular caution triangle button again to collapse the text box so you can control the call.



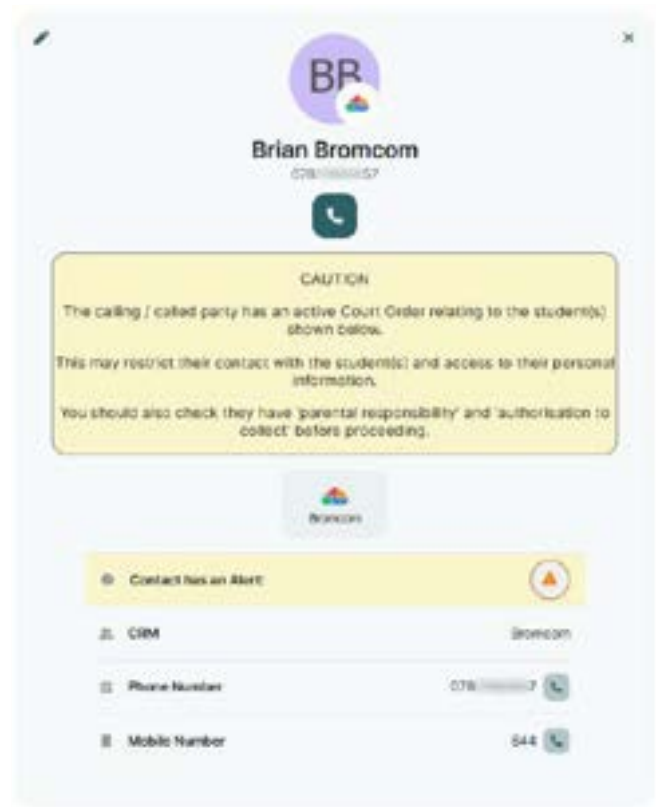
The other buttons on the pane function in the same way as described earlier in this section.

On a Contact

The Court Order functionality also extends to Contacts. When you have performed a search and selected a contact from the list, the detail pane will show the usual information plus a yellow bar with a circular caution triangle button at the end.



Click this button to expand the text box explaining that a Court Order exists for the caller/callee. Click the button again to collapse the text box.



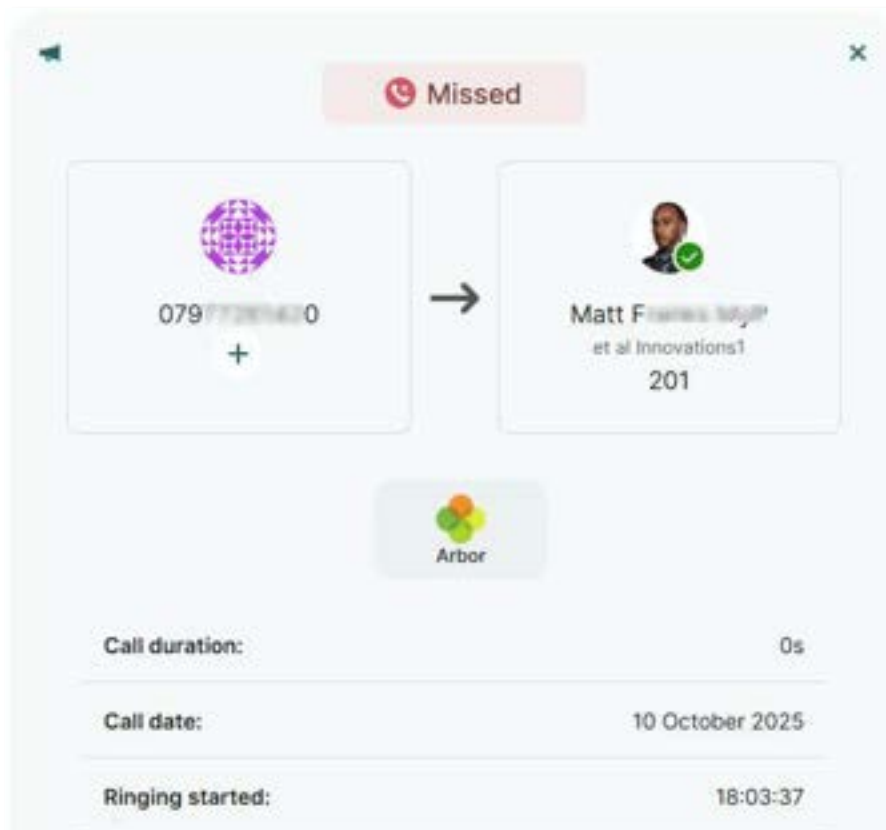
You may screen-pop a MIS contact directly from the Contact detail pane. Click the button labelled with your MIS (Bromcom in this example). Multiple contacts may be shown depending on the MIS(s) which your admin has configured for you.

Each of the resulting contact names may have a caution triangle next to them if there is a Court Order associated with them. Each name can be clicked to screen-pop that contact in the respective MIS.



On a Call History entry

Similarly, you may screen-pop a MIS contact directly from the Call History detail pane. Click the button labelled with your MIS (Arbor in this example). Multiple contacts may be shown depending on the MIS(s) which your admin has configured for you.

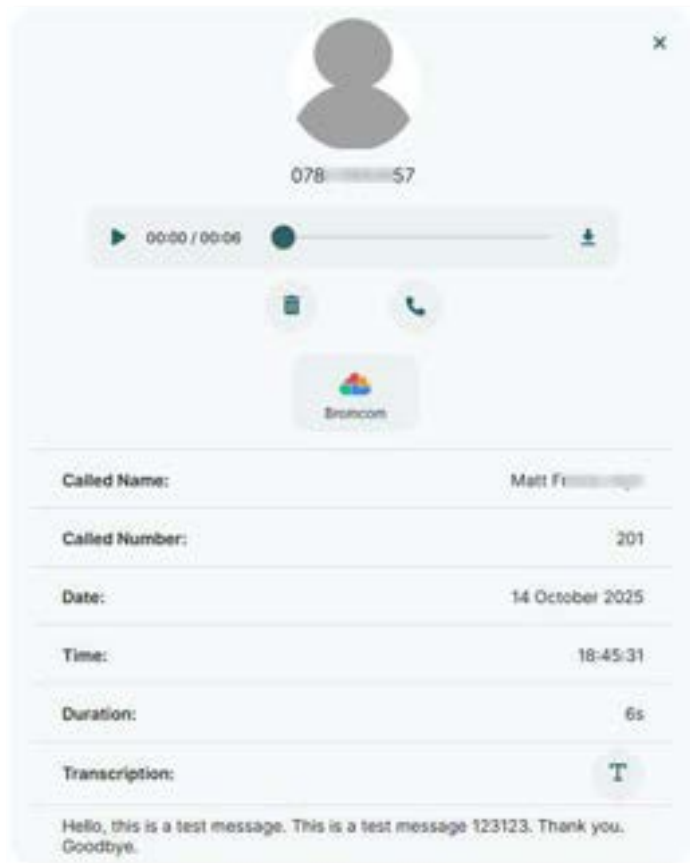


Each of the resulting contact names may have a caution triangle next to them if there is a Court Order associated with them. Each name can be clicked to screen-pop that contact in the respective MIS.



On a Voicemail message

Lastly, you may screen-pop a MIS contact directly from the Voicemail detail pane. Click the button labelled with your MIS (Bromcom in this example). Multiple contacts may be shown depending on the MIS(s) which your admin has configured for you.



Each of the resulting contact names may have a caution triangle next to them if there is a Court Order associated with them. Each name can be clicked to screen-pop that contact in the respective MIS.



CPOMS safeguarding incident reporting

The Child Protection Online Monitoring System (or CPOMS for short) is a safeguarding tool for schools and education establishments. It facilitates the reporting of any safeguarding concern following an interaction between a staff member and a student or parent/guardian.

Evonex Connect provides quick and simple integration to CPOMS which allows staff members to create new CPOMS incidents without leaving the application. Incidents can be created while on an incoming or outgoing call or following the end of a call from the staff member's Call History, or from a Voicemail message.

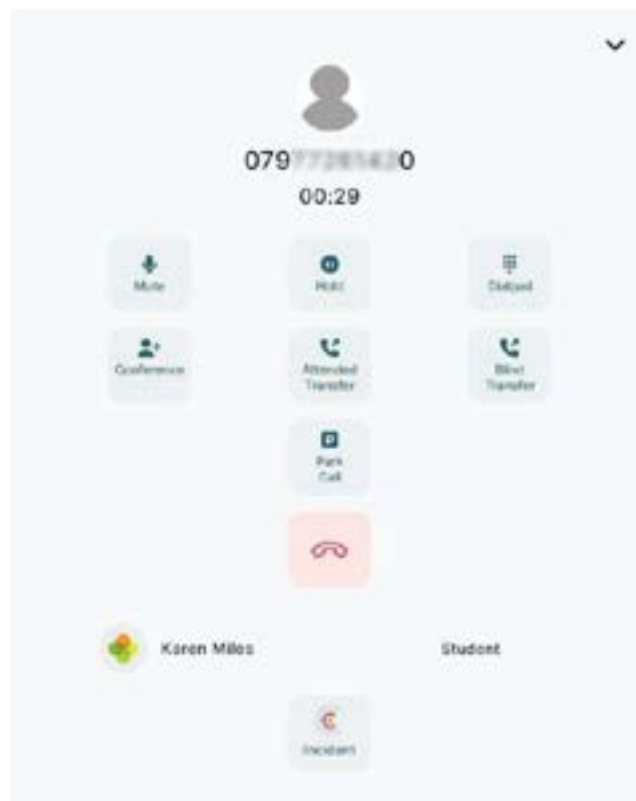
CPOMS integration is configured for you by your administrator. For CPOMS integration to function, the following must all be satisfied:

- A supported MIS (Arbor or Bromcom) must also be configured.
- The caller/callee's telephone number must be matched to a parent/guardian contact in the MIS, the contact must have one or more linked student(s), and said students must have valid UPNs saved in the MIS, OR:
- The caller/callee's telephone number must be matched to a student contact in the MIS, and said student must have valid UPNs saved in the MIS



Once configured, the CPOMS Incident button can be found in three separate places within Evonex Connect:

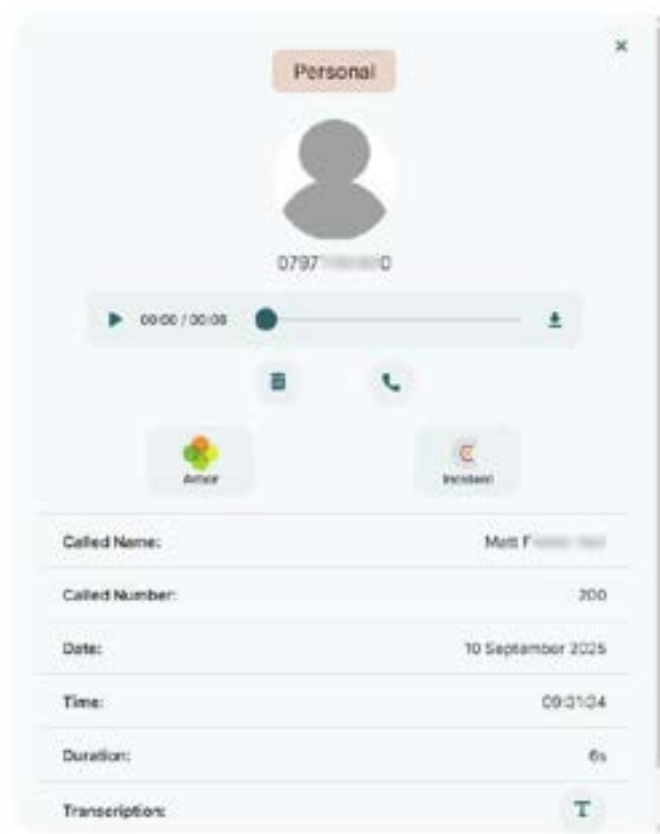
1. At the bottom of the active call pane (incoming or outgoing call) to allow the staff member to start reporting an incident while they're still on a call



- From the Call History detail pane for incoming or outgoing calls (not missed calls) to allow the staff member to report an incident for a call that has already happened.



- From the Voicemail detail pane to allow the staff member to report an incident based on the content of a Voicemail message.





To start the incident reporting process, click the CPOMS Incident button and an overlaid CPOMS incident window will be shown. If there are more than one students linked to the matched contact(s) you must select which one this incident involves. Then, simply enter your description of the incident.

A screenshot of a web application window titled 'Create CPOMS Incident'. The window has a light blue header with the title. Below the title, it says 'Select which student this incident involves:'. There are four radio button options: 'Billy Bromcom (Child of Brian Bromcom)', 'Betty Bromcom (Child of Brian Bromcom)', 'Karen Miles (Child of Alison Arbor)', and 'Violet Webster (Child of Alison Arbor)'. The 'Violet Webster' option is selected. Below the options is a text area labeled 'Incident:' containing the text 'Dad called reporting child has a sore tummy. Third time this week.' At the bottom of the window, there are three buttons: 'Clear', 'Save and exit', and 'Submit Report' (which is highlighted in a darker blue).

The information you enter here is automatically saved. You may click outside of the incident window, and it will disappear to allow you to make or receive other calls. However, you will not lose the information entered so far.

To return to the same incident window and carry on with the process, click the same CPOMS button, which will now contain an orange flag in the top-right hand corner to indicate an unsubmitted incident. The incident creation window will return with all previously entered information intact.



The same is true if you click the 'Save and exit' button. To delete all entered information, click the 'Clear' button.

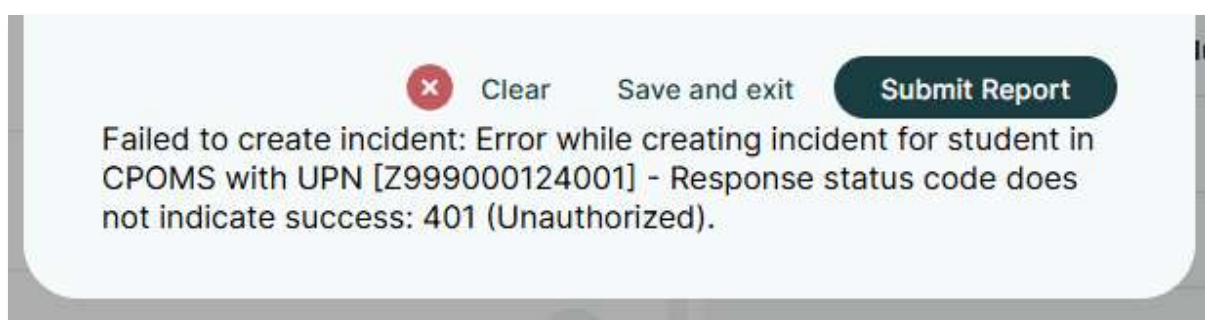
When you are ready to submit the incident, click the 'Submit Report' button. You will see a green tick at the bottom of the incident window, and it will then automatically disappear.



In CPOMS, an incident will be created against the Student you have selected. The incident will have the category of 'Evonex Communications'. The information you typed will be added to an incident, as will the 'Reporter' which is your Evonex Connect user name.



If you see a red cross and an error message (similar to the below but not necessarily identical) please report your incident manually and contact your administrator or support team for assistance.



Other schools and education-focussed features

Please ask your Account Manager or Support Team about the other included features of Evonex which have been specifically developed for education settings:

Security Alerts

A Security Alert can be triggered by dialling a code from any phone in the school. The other phones will receive the Security Alert which causes them to play a distinctive klaxon tone and display the name of the alert and the source number.

Classroom Licence

This licence type allows classrooms, corridors and common areas to have a basic telephone with internal and emergency call functionality only. It's available at a much-reduced cost over our full Universal Licence but is still compatible with the Security Alerts feature.

Insights Reporting

Allow certain staff members access to call logging and reporting functionality. Default or bespoke reports can be configured and run on an ad-hoc basis or scheduled to arrive in your email on a frequency to suit you. This is useful to track things like missed unreturned calls and outbound calls to parents/guardians from other phones in the school. These often lead to returned calls from those parents/guardians back into reception. Reception can use these reports to immediately identify the staff member that originally called them, then transfer the parent/guardian's call back to them.

Shared Voicemail Inboxes

Schools often use voicemail for key functions, such as absence reporting. Evonex voicemail inboxes can be shared between school office staff members so they can share the responsibility of managing the messages. Evonex also has Voicemail-to-Email as standard. **Please note:** Evonex Voicemail-to-Email is compatible with Arbor's auto-absence feature.

Evonex Connect Mobile App

Staff members can use the Evonex Connect mobile app to make and receive calls and Security Alerts around the school or while working from home. The Evonex Connect mobile app is vital for staff members on school trips – they can easily keep in touch with other staff members and even contact parents. Of course, they'll always be presenting the school's main telephone number as caller ID rather than their mobile number, and calls are logged and can be recorded for safeguarding purposes.

Import Contacts

Contacts can be imported into the Evonex platform from other MIS platforms, databases or spreadsheets. This means that key contacts are always available from all telephones in the school and softphone and mobile apps.

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