



5.3 How to Configure Softphone Solo for Remote Desktop

Bright Pattern Documentation

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Table of Contents

Table of Contents	2
How to Configure Softphone Solo for Remote Desktop	3
Procedure	3
Step 1: Configure a hardphone for your contact center	3
Step 2: Set the agent's default hardphone number	4
Step 3: Configure Softphone Solo	5
Step 4: Check that the agent can use the phone in Agent Desktop	6
Troubleshooting	7
Unable to access the system	7
Unable to obtain phone configuration. Error: HTTP error: 401 Unauthorized	8

How to Configure Softphone Solo for Remote Desktop

This article describes how to configure Softphone Solo for remote desktop use. Softphone Solo is an application (Windows) that installs the softphone functions of Bright Pattern's Agent Desktop Helper Application component (i.e., *bpclient.exe*) outside of a user's main client machine.

When Softphone Solo is set up, contact center users are able to have softphone functionality on Agent Desktop through a remote session—without having to download and install the Agent Desktop Helper Application component.

Procedure

In this procedure, we treat Softphone Solo as a default hardphone, and we assign it to each Agent Desktop user with a specific number.

Step 1: Configure a hardphone for your contact center

1. Log in to the Contact Center Administrator application and go to section *Configuration > Directory > Hardphones*.
2. Click **Add hardphone** (“+”) to add a new hardphone.
3. In the *Properties* tab, set the following:
 1. **Number** - The number (e.g., “5001”) that will be used for users who log in to Agent Desktop with a remote session; choose a number that is different than the number range of users' extensions
 2. **Caller ID** - Optional; OK to leave empty
 3. **MAC address** - Leave empty

	Properties	Authentication	Forwarding
Number:	<input type="text" value="5001"/>		
Caller ID:	<input type="text"/>		
MAC address:	<input type="text"/>		
	Optional, for automatic provisioning of supported softphones. Entering or Changing MAC here also turns on authentication and changes phone password.		
Phone registers dynamically as:	5001@bpcc		

Hardphone Properties

4. In the *Authentication* tab, set:

1. **Username** - Set the hardphone number (e.g., "5001")
2. **Password** - Set any, but follow the rules of your contact center's password policy

	Properties	Authentication	Forwarding
Username:	<input type="text" value="5001"/>		
New password:	<input type="password" value="....."/>		
Confirm password:	<input type="password" value="....."/>		
	<input type="button" value="Generate password"/>		

Hardphone Authentication

5. Click **Apply** at the bottom of the screen to save your changes.

Step 2: Set the agent's default hardphone number

As a best practice, set the agent's default hardphone number. This is the number that the agent will use for placing calls in Agent Desktop. Note that this step is not required for using Softphone Solo, but it is recommended. The agent can choose a number manually at a later time.

1. Go to section *Configuration > Users & Teams > Users*.
2. From the *Users* list, select the agent who will be using Softphone Solo.
3. In the agent's *Contacts* tab, set the **Default hardphone number** to the same number you configured for the hardphone in Step 1 of this procedure.

Properties | **Authentication** | Forwarding

Username:

New password:

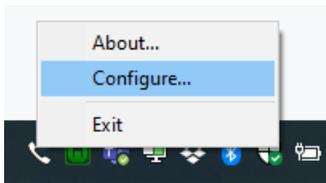
Confirm password:

The Users > Contacts properties for the agent

4. Click Apply at the bottom of the screen to save your changes.

Step 3: Configure Softphone Solo

1. Download and install the Softphone Solo for Windows application (*SoftphoneSolo_5.x.x.xxxxx.msi*). Please contact Customer Success Management for the file.
2. Launch the application after installation is complete, or right-click the **Softphone Solo tray icon** (phone icon) and select **Configure** to launch it.



Softphone Solo tray icon,
right-clicked

3. The Softphone Solo configuration dialog will open.

Softphone Solo configuration

HTTP(s) URL to access the system:

Tenant name:

Login:

Password:

Use manual configuration

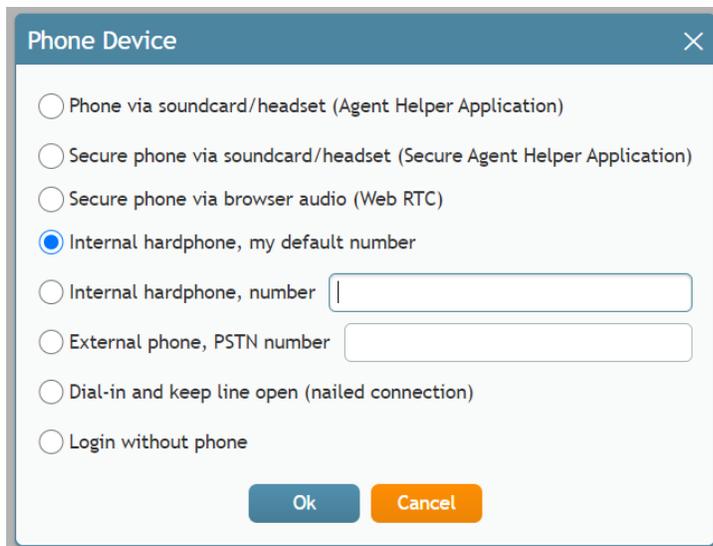
Softphone Solo configuration settings

4. Set the following:
 1. **HTTP(s) URL to access the system** - The URL of the contact center (e.g., "<http://company.brightpattern.com>")

2. **Tenant name** - The contact center domain (e.g., “company.brightpattern.com”)
3. **Login** - The agent’s username (e.g., “christy.borden”)
4. **Password** - The user’s password
5. Click **Apply**.
6. If you see an error message, go back and check your configuration, as you may have set the wrong username/password or the wrong URL. The [Troubleshooting](#) section describes some common errors you may encounter.

Step 4: Check that the agent can use the phone in Agent Desktop

1. Go to the Agent Desktop application, and log in as the agent, using the same Authentication user name and password as set in the Softphone Solo configuration dialog.
2. Go to *Settings > Phone Device* and set **Internal hardphone, my default number**. You will have to log out and log in again for the change to take effect.



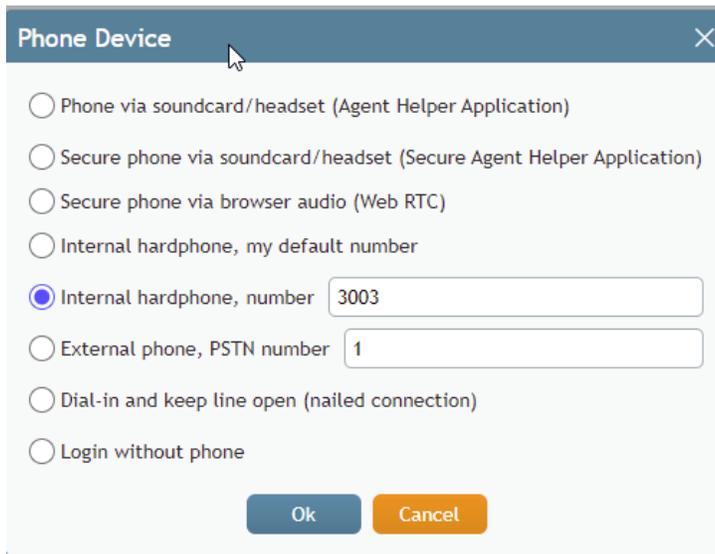
The screenshot shows a dialog box titled "Phone Device" with a close button in the top right corner. The dialog contains the following options, each with a radio button:

- Phone via soundcard/headset (Agent Helper Application)
- Secure phone via soundcard/headset (Secure Agent Helper Application)
- Secure phone via browser audio (Web RTC)
- Internal hardphone, my default number
- Internal hardphone, number
- External phone, PSTN number
- Dial-in and keep line open (nailed connection)
- Login without phone

At the bottom of the dialog are two buttons: "Ok" and "Cancel".

Selecting the phone device in Agent Desktop

Note that if the agent (or an administrator) has configured Softphone Solo manually, the agent has the option to use the **Internal hardphone, number** setting, with the number of their choice, as shown.



Selecting the "Internal hardphone, number" setting

3. After logging in again, if you hover your cursor over the agent's **Settings**, you will see that the agent's phone number is the default hardphone number (e.g., "5001").



Hover text over agent's profile/Settings shows the agent's phone number

4. Configuration is now complete. Try placing a call.

Troubleshooting

This section describes error messages and what they mean.

Unable to access the system

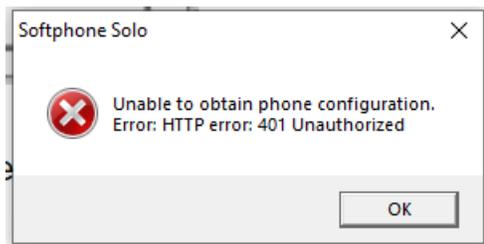


Unable to access the system error message

This error could mean that you may have set the wrong URL in configuration. Make sure that in the field HTTP(s) URL to access the system, that you have set the correct URL of your contact center, including the leading "<http://>" (e.g., "<http://company.brightpattern.com>").

You can quickly check the status of both configuration options (automatic and manual) by looking at Softphone Solo's Windows tray icon (phone icon) color at the bottom of your desktop screen: green = OK, gray = fail.

Unable to obtain phone configuration. Error: HTTP error: 401 Unauthorized

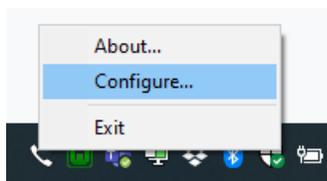


HTTP error:401 message

This likely means that you did not set the user's default hardphone number to the correct number, and because of that, the configuration could not be completed.

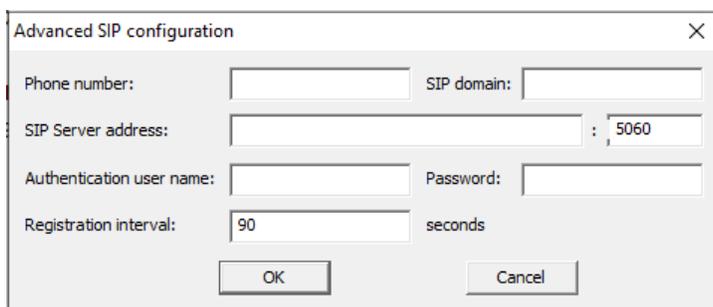
Or, it means that some other values have not been configured. If this is the case:

1. Right-click the Softphone Solo tray icon and select **Configure**.



Configure Softphone Solo

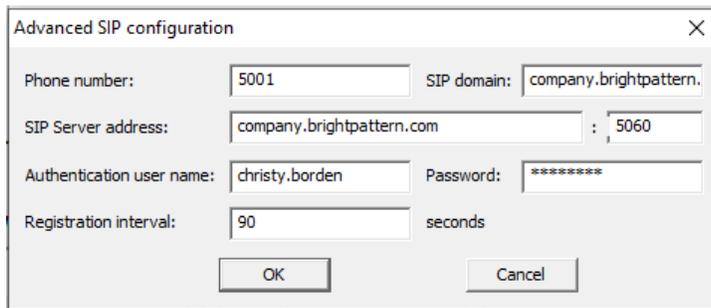
2. Select the checkbox for **Use manual configuration** and click **Configure**.
3. In the *Advanced SIP configuration* dialog that opens, if you see that the Advanced SIP configuration is empty, fill in the blank fields. These settings are normally filled in by the system automatically during manual configuration. However, these settings could be affected if the default number was not set correctly, or some other setting was wrong.



Advanced SIP configuration, empty

1. **Phone number** - The hardphone number you configured in Step 1 of this procedure (e.g., "5001"); this will be filled in for you once you enter the Authentication user name and password (see below)
2. **SIP domain** - Your SIP domain; this will be filled in for you once you enter the Authentication user name and password (see below)
3. **SIP Server address** - Your SIP Server address (e.g., "<tenant_url>.brightpattern.com"); this will be filled in for you once you enter the Authentication user name and password (see below)
4. **Port** - 5060 (default)
5. **Authentication user name** - The username of the agent (e.g., "christy.borden") who was assigned the hardphone in Step 2 of this procedure
6. **Password** - The agent's password
7. **Registration interval** - 90 seconds (default)

4. When done, the settings should look like this:



Advanced SIP configuration

Phone number: 5001 SIP domain: company.brightpattern.

SIP Server address: company.brightpattern.com : 5060

Authentication user name: christy.borden Password: *****

Registration interval: 90 seconds

OK Cancel

Advanced SIP configuration settings completed

5. Click **OK**.
6. Back in the *Softphone Solo configuration* dialog, click **Apply**.

