PHONE-LiNK - User Guide

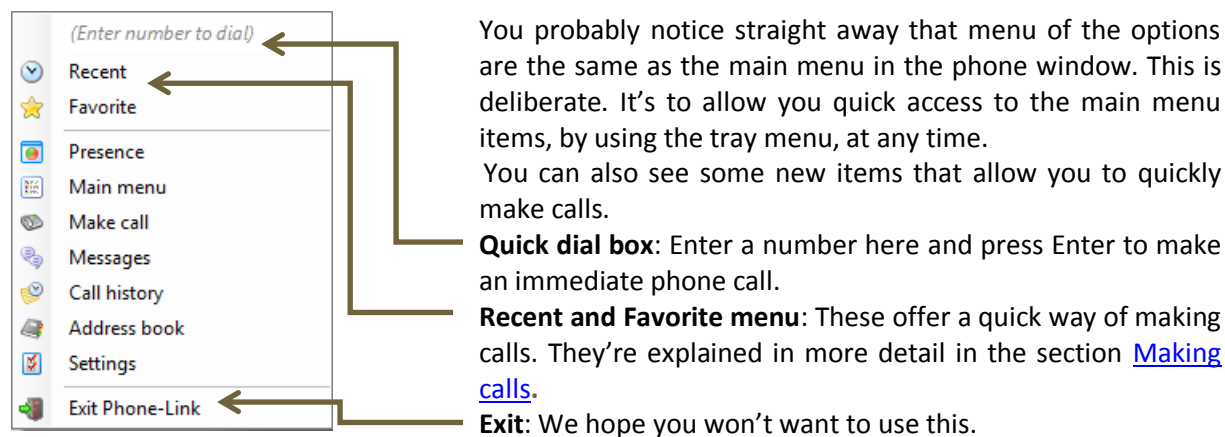## Contents

Welcome to PHONE-LiNK.

PHONE-LiNK has been designed to make your phone easier and more convenient to use. It can do this in a number of ways and this document will show you how.

Much of the action in PHONE-LiNK happens in what we call the "Phone" window (pictured below). Let's have a look at the main parts of it:

Menu button: You can get quick access to many parts of the software from here. You can also double-click on this button to go straight to the main menu.

Minimize and close: These will make the phone window disappear.

Main canvas: This dynamic area is where menus, calls, messages and a number of other things appear.

LCD Panel: This shows details of any active call

Custom buttons: There is space for two user-definable buttons (e.g. Run application)

Call control buttons: These buttons light up to allow you to Answer, Hangup or Hold any active calls.

At the start, you're likely to use the Phone window to do much of what you want to do. In time, though, you'll probably prefer to use the Tray menu and Preview windows because they offer the most convenient way of using your phone. So let's have a look at the Tray menu now. We'll look at the preview window later:

You probably notice straight away that menu of the options are the same as the main menu in the phone window. This is deliberate. It's to allow you quick access to the main menu items, by using the tray menu, at any time.

You can also see some new items that allow you to quickly make calls.

Quick dial box: Enter a number here and press Enter to make an immediate phone call.

Recent and Favorite menu: These offer a quick way of making calls. They're explained in more detail in the section Making calls.

Exit: We hope you won't want to use this.

What would you like to do?

Are you still with us? Congratulations. Many people just go straight to the software and figure it out from there. But you know what? They're missing out. This is where we show you how to get the most from the software. Plus, it's presented in a topic-by-topic way, so you can read the sections that you're interested in first.

So what would you like to know? Have a look at the choices below. They are presented in a logical order based on the main menu. They are not necessarily in order with the most interesting first, so feel free to skip over any that look dull:

|	
Making calls	How many different ways can you make calls? Which are the best?
Messaging	How can you send instant text messages to other users?
Call history	Taking a look at your call history and what you can do with it.
Address books and contacts	How to assign names to callers and how best to use this information.
Settings and configuration	How do you configure PHONE-LiNK to get the most out of it?
Call control	How can you control calls from your PC? What is the best way to work?
Preview window	Using the Preview windows will tell you what you want to know without being too intrusive.
Presence window	The Presence window shows the status and availability of other Extensions, Users and Contacts.

Want to know how to assign names to callers? Read **Address books and contacts**.

Want to know how to control calls? Read **Call control**.

Making calls

So, we're going to look at ways of making it easier to call people. But at the same time, we don't just want to use technology for the sake of it. So where do we start?

Well, the best way to do this is to look at the different ways that you might get the number that you're going to call, and then look at the best way to call them. For instance, you might be browsing the internet and see the telephone number of a company who you'd like to call. In this instance, the most natural thing would be to click on the number to dial them. We call that internet dialing (more about this later).
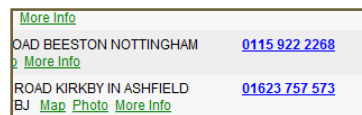
Or if you are using your company's Contacts Management program and you have a contact's details on screen, you don't want to have to lift your handset and dial the number by hand. There's a much easier way now.
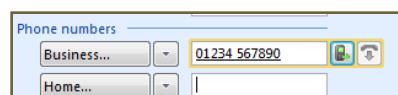
So when you make calls, where do you get the numbers from? Let's look at some possibilities:

From a piece of paper

Well, you might as well lift your handset and dial the number on your telephone keypad. But if that's the case then you should think about storing the person's name in PHONE-LiNK and then next time, you can find them more easily.

Alternatively, you could right click on the PHONE-LiNK tray icon and then enter the number in the text box at the top. You can even use the backspace key if you type it wrong. Easy, eh?
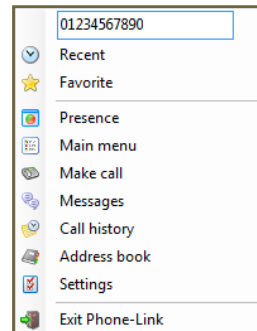
Or, if you happen to have the Phone window open, then just start typing a number on your keyboard. PHONE-LiNK will understand that you want to make a call and switch to the "Make call" screen. Press the Enter key when you've finished typing to make the call.

Someone you spoke to recently

If you spoke to them using the phone that PHONE-LiNK is connected to then the call should be in your call history. At the main menu, press the call history button and you will get a list of your calls in reverse date order. If you see the caller in this list, then click

on their telephone number to make a call to them directly from this screen.
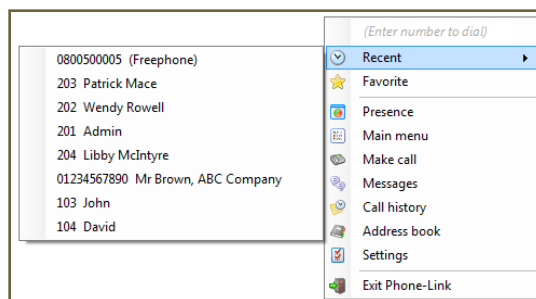
Alternatively, if the person was one of the last ten people that you spoke to, then they will be in your "Recent" list. You can get to the Recent list from either the PHONE-LiNK tray icon or from the Make call screen.
Note: these Recent numbers are stored on your PC not on the server.

Someone you phone regularly

If you regularly speak to someone then you should consider adding them to your list of favorites. This is done in the Make call screen, which is also one place that you can access them to ring them. Once they're in, the most convenient place to phone them from is probably the tray icon menu.

Once someone is listed as a favorite, then they are indentified as such in your Call history and in the Phone window when you are on a call to them. Note: Names that are entered against a favorite are kept private and only you get to see them. This effectively gives you a private address book.

From a web page

You can configure PHONE-LiNK to search your web pages (for supported browsers) for telephone numbers to dial. It won't find all of them, unfortunately, but it is good at phone directory searches because it is optimized to understand this kind of page. To turn this functionality on, you need to go to the Settings main menu option and then go into Dialing settings. Here you can turn on "Internet dialing" AND "Add hyperlinks to web pages" (you need to turn them both on).Don't forget to press "Save" when you're done.

Some web pages, such as Contact Management systems may contain text boxes with telephone numbers in. These work slightly differently because we can't make these into hyperlinks. To add dialing support to this type of web page, then you will need to tell PHONE-LiNK to search for them. To do this, then you need to follow a couple of simple steps:

i) Enter the telephone number "0123454321" into the text box (you don't need to save it) and then go to the Internet tab in the Dialing settings page.

ii) Then press the Add button and then the Detect button. PHONE-LiNK will then scan all open web pages and find the first instance of this number (you can only do one at a time). Press the Save button and in future (next time you refresh the page) it will add a Dial button next to the text box.

From another application

It is very common to store telephone numbers on a PC, particularly in contact management applications. However, applications actually vary a lot as to how these numbers are presented. This gives quite a challenge for applications such as PHONE-LiNK to make dialing possible. Fortunately, we've been doing this kind of thing for a while and we've put some nice tools into PHONE-LiNK to allow you to dial from other applications. The first and easiest of all of them is Clipboard dialing.

Clipboard dialing can be turned on in the Settings -> Dialing settings page. When on, PHONE-LiNK will keep an eye on the clipboard and if you copy something to it that looks like a telephone number then a bubble will appear from the tray icon that asks you if you want to call the number.
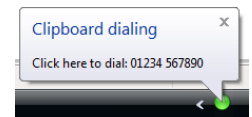
When using this method of dialing, you may want to help PHONE-LiNK know what is a valid number by entering a minimum and maximum length and possibly a prefix that numbers must start with. This can be done in the Dialing settings page.

If you regularly dial from a certain application then there may be a quicker way to dial. This involves a detection phase where PHONE-LiNK learns your application, and is called **Application dialing**. To try it out, then go to the Applications tab in Dialing settings page.

At this screen then press the Add button and you can try to detect your application. The way that you do this is as follows:

i) Click on the crosshair next to the word "Detect" as in the screenshot above.

ii) Drag the mouse (without releasing the button) over the text box

in your application when a number is stored.

iii)   Release the mouse button when the mouse cursor is above the textbox. (This obviously means that you need to get PHONE-LiNK and your application side-by-side to achieve this). If the crosshair icon changes to a check then it is likely that PHONE-LiNK can add dialing support to this box.
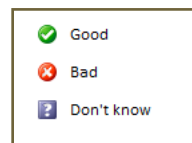
When you have finished then press the Save button, then turn on Application dialing and .Net applications, then save the Dialing settings also. Next, close and reopen your application window to see if it has worked. The results will depend on what type of application it is. You will either see one of three possibilities:

i)   A dial button will appear to the right hand side of the text box. This means that you have a ".Net application". (You probably saw a check when doing the detection also). If this is the case, then you should proceed to "Detect" the other text boxes in your application to make them work also.
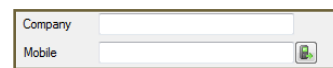
ii)   Alternatively, try hovering your mouse above the text box (making sure that there is a valid telephone number in it). All being well, a Dial and Hangup button will appear to the right hand side of the text box. This means that you have a non-.Net application (you probably saw the "Unknown" icon when detecting).
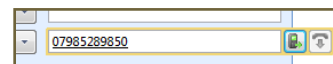
iii)   If neither of these two things happen, then the text box probably isn't supported, so you should consider using the Clipboard method instead. Note: you might also be trying it with an web-based application, if so then have a look at the earlier section under dialing from a web page.

From Word and other Microsoft Office applications

When PHONE-LiNK is installed, then it also installs "SmartTags" for use in Microsoft applications. These SmartTags allow these applications to actively detect telephone numbers and when they see one then they underline them. Putting your mouse over a SmartTag highlighted number then brings up an information box which includes an option to dial the number.
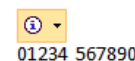
From your own in-house developed application or database.

We have to get a little "techie" here, so if you don't develop your own in-house applications, then feel free to skip straight past this.

So what kind of an application do you have?

i) **Web-based**: If so, then we suggest that you put "Anchors" <A> around any telephone numbers. The href should be "Dial: 123" and replace 123 with your real number. If you want to put Dial buttons next to your input textboxes or under buttons, then we suggest that you use the window.OpenURL function and construct a string containing "dial: 123" as a parameter (changing the number to the correct one obviously).

ii) **Non-web based**: When you want to make an outbound phone call (ie by putting a Dial button next to a text box) then do so by running or shelling the PhoneHelper.exe program (found in the same directory as PHONE-LiNK) with a command line parameter of "Dial(123)" (without the quotes).

So, that's it for dialing options. Unless you can think of any more…

Messaging

How can you get someone's attention if they are on a phone call to someone else? Well you could stand in front of them and wave your arms and risk putting them off, or you could do the polite (and less energetic) thing and send them a text message. Unlike emails, which people don't tend to read while they are on the phone, a text message has a better chance of getting their attention.

So how do you do it? Well, it's nice and simple. Go to the Messages item on the main menu and press the New message button in the top right hand corner and then… Hey, who are we kidding, you've already done it haven't you. Messaging is one of the most popular parts of PHONE-LiNK. It's one of the first places that users go to. Did you know we get more enhancement requests to do with messaging than any other part of the software?

So what else can you do with text messages apart from the obvious? Well, did you know that you can send a message to more than one person at a time? Just type multiple names in the To box at the top and then type your message and press Send. Plus, if you ask your site administrator nicely, they'll set up some groups to allow you to easily send messages to a group of people at the same time.

Text message conversations are "threaded". This means that when someone chooses to "reply" to your message, you will see their reply above your earlier message. This is most useful when you send a message to a group of people.

What does it look like when you receive a message? Well, this largely depends on your Interface settings. By changing your interface settings, you can either "pop" the larger Phone window with new messages, or have the smaller Preview window appear. And, yes, in the Interface section you can set it to play an audio file when you receive a message (go on, you know you want to…)

Once you've been using messaging for a while you'll probably want to delete messages as and when you've
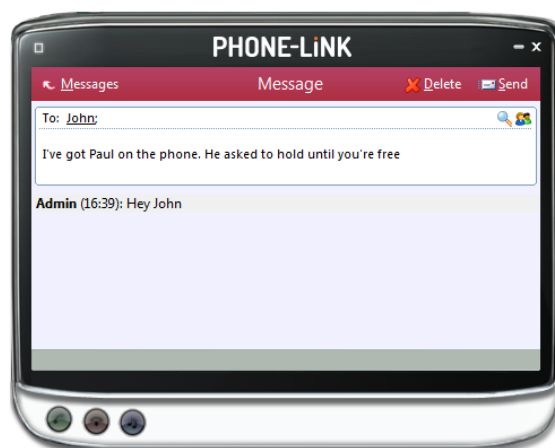
read them. No problem, you can do this from the Messages window where there is a list of all of the message threads that you have been involved in. Click on the red cross here to delete all of the messages under a given thread. Alternatively, if you click on a thread to view it, you can delete it using the Delete button in the top right hand corner.
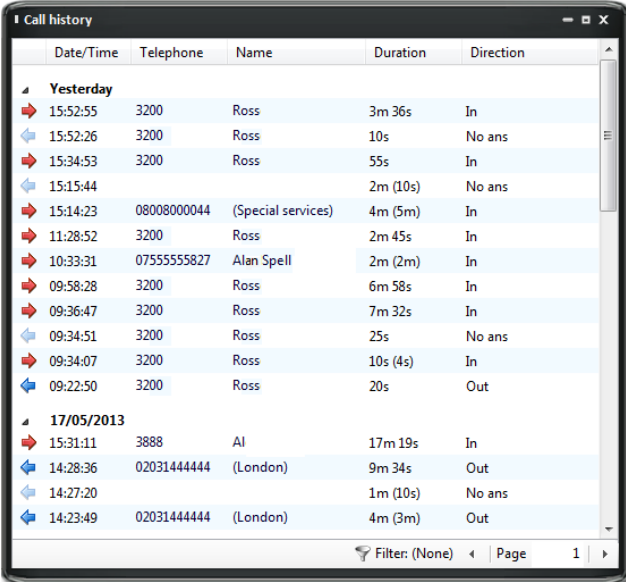
Call history

Once you've used PHONE-LiNK for a while you will come to rely on the Call history. It's a great way to find the telephone number of someone who you spoke to recently. The Call history window is accessed from the Call history item on the Main menu or from the tray icon menu. As well as reviewing recent activity you can dial someone from here by clicking on their telephone number and you can access their contact record here by clicking on their name (we'll look more at this in the Address book section). It's good practice to store the names of people when you speak to them, especially if you're likely to speak to them again.

By default, the Call history screen returns the fifty most recent calls. The next fifty can be accessed by pressing the page right button in the bottom right of the window.

Call history can be filtered using the criteria: "Direction" (Inbound or outbound), "Answered" (Answered or Not answered), "External calls" (External or Internal), Time and Duration of the call.

Also, to aid readability you can hide and show individual days from your history by pressing the plus/minus button to the left of the date.

Call history					
Date/Time	Telephone	Name	Duration	Direction	
Yesterday					
15:52:55	3200	Ross	3m 36s	In	
15:52:26	3200	Ross	10s	No ans	
15:34:53	3200	Ross	55s	In	
15:15:44			2m (10s)	No ans	
15:14:23	08008000044	(Special services)	4m (5m)	In	
11:28:52	3200	Ross	2m 45s	In	
10:33:31	07555555827	Alan Spell	2m (2m)	In	
09:58:28	3200	Ross	6m 58s	In	
09:36:47	3200	Ross	7m 32s	In	
09:34:51	3200	Ross	25s	No ans	
09:34:07	3200	Ross	10s (4s)	In	
09:22:50	3200	Ross	20s	Out	
17/05/2013					
15:31:11	3888	Al	17m 19s	In	
14:28:36	02031444444	(London)	9m 34s	Out	
14:27:20			1m (10s)	No ans	
14:23:49	02031444444	(London)	4m (3m)	Out	
Filter: (None)	◄	Page	1	►	

Address books and contacts

The Address book window is accessed from the Address book item on the main menu or tray menu icon. It provides access to a company-shared address book. Unless you're the first person to use the software at your company, then there are probably some entries already in there. Go ahead and have a look. Don't worry about filling in any of the boxes, just press the Search button at the bottom and see if there are any entries already there.

No, none in there? No problem, we'll add one now. If you did see some entries, we'll discuss the results page shortly. But first, we're going to add another entry.
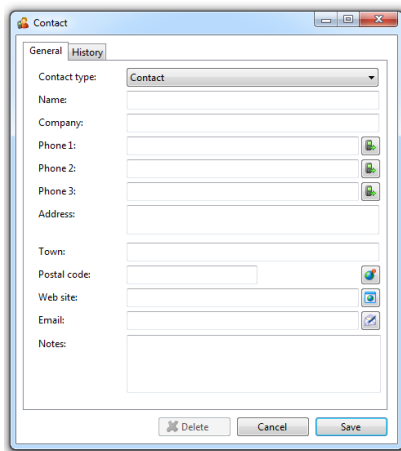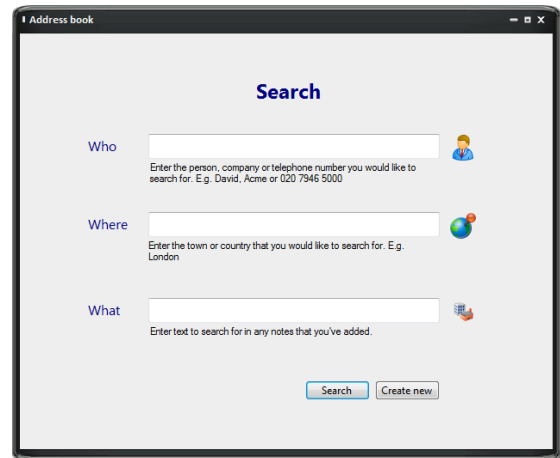

On the results page, press the New search button at the top and in the original Search page press the Create new button at the bottom. This will present you with a blank Contact window. Enter a name, company and phone number in the relevant boxes. All of the boxes from the Contact window, including the Notes box on the second tab, can be searched. You can also interact with some of the boxes to make a call, send an email, etc.

You may be wondering what the Type box is for at the top of the page. This is used to change the format of the Contact window. Different "types" have different templates. Pick the one that best represents the contact entry that you are creating. When you're finished press the Save button and we'll search for your new entry.

Back at the main Address book search page, enter search criteria to find your entry. If you want to search using the contact's name or company name then put some text in the "Who" box. The Who box can also be used to search using a partial or whole telephone number.

The Where box is used for address fields such as town or postal code. Finally, the What box searches the remainder of the fields such as the Notes box.
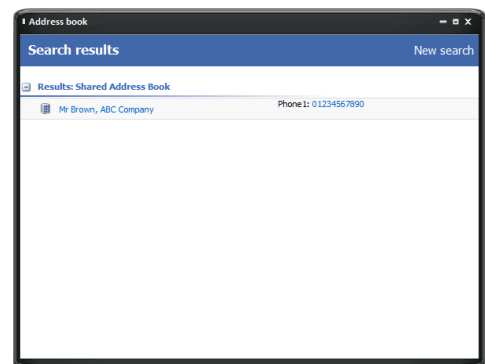
Press the Search button and after a short delay you'll be presented with a list of results. From this screen you can click on the telephone number of a contact to dial them, or click on their name to edit or view their contact details including the contact's most recent call history.

Storing contact details when on a call

If you've made or received an external call using the Phone window yet, you've probably noticed that when PHONE-LiNK doesn't know who the other party is that you're speaking to, then it will show a town or location name instead.

It does this in an effort to be helpful, but if you really want to help yourself, then you'll add a name to the contact for future use.

How do you do this? You press the "New contact" button on the right hand side of the screen. (You already knew this, didn't you?)
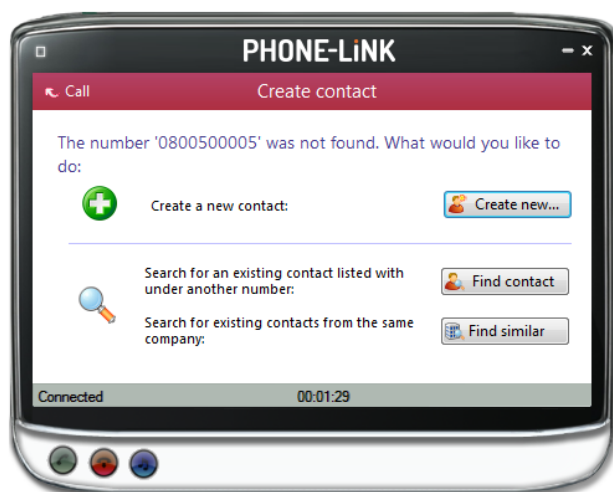
PHONE-LiNK will auto-populate the phone number in the "Phone 1" field, all you have to do is just to enter the person's details, like before. If you're not sure if the person or company is already stored under one of their other numbers then go to the Address Book to look for the company/person's name, PHONE-LiNK will display all of the relevant entries related to your search criteria. The "Find contact" button does very similar things, so it doesn't really matter which one you pick. The Find contact button shows a blank search screen where you type the person or

company's name to see if you already have an entry for them. The Find similar button starts the search by looking to see if the first part of the telephone number is already in the Address book. This would typically happen if you have dealt with the company before but stored the contact record under a similar telephone number.
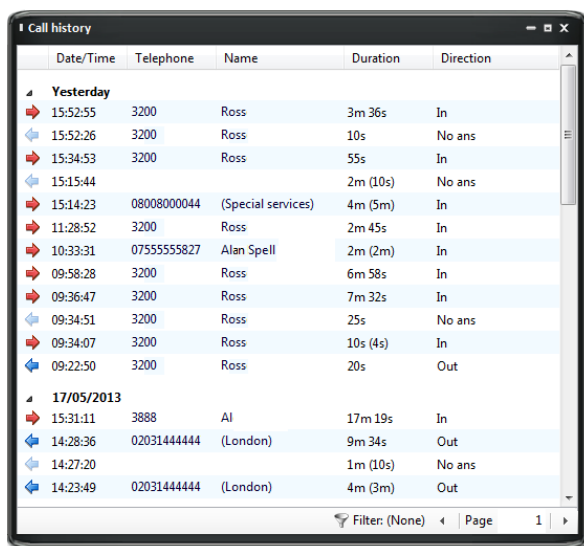
From here you can show the relevant Contact window so that you can edit it, add a number to an existing contact or create a new contact.

Adding contact details from the Call history window

You may find it easier to add a contact's name and other details after the call has ended. This is fine, you can concentrate better this way. To do this, go into your Call history and click on where the name would appear (it will be a location name in brackets instead). When you do this, PHONE-LiNK will open the contact window and you can enter the person's details as before and click on Save.

It's a good idea to have a look in your Call history, from time to time, and enter caller's details in this way. That way, when you're looking for someone's number, you will be able to find it.
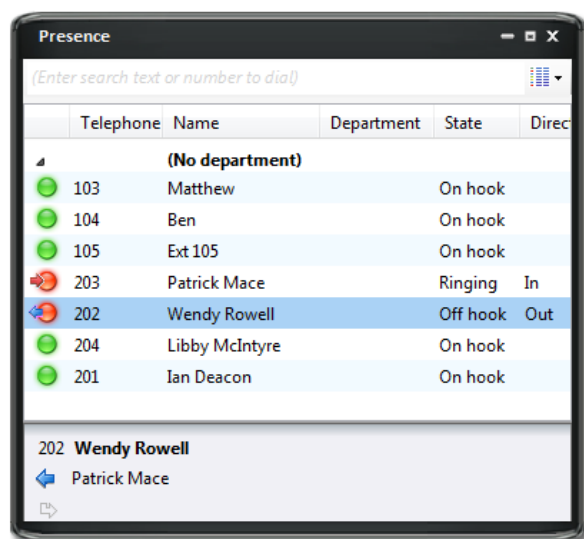

Presence window

In its most basic form, the Presence window provides a quick way to check the availability of your colleagues. The Presence window is accessible from the main menu, tray menu or the left hand edge of the phone window. When you first install PHONE-LiNK, then the Presence window should contain a list of all the extensions, unless your administrator has chosen a different arrangement.

If you click on one of the entries in the Presence list, then a context menu should appear. Assuming that you are not already on a call, then the menu should contain the items Make Call, Call History and Send Message. By choosing one of these actions, you can check your colleagues call history, dial the extension directly, or begin to send them a message.


If you had been on a call already, then the choices would have been Consult and Transfer in place of Make call. This is appropriate because, if you are already on a call, then the expectation is that you are clicking on the extension with a view to transferring the call to them.

What other actions can you perform? Well, if you see an extension that is flashing red then it means that the extension has a call ringing at it (you might be able to hear the phone if it's nearby). Click on the extension and the context menu will include an option to Pickup the ringing call.

The other colors that you might see are on the Presence list are solid red, which means that the extension is engaged on a call, and fluttering yellow, which means that there is an held call at the extension.

🟢	Available
🔴	Busy
⚪	Offline
🟡	Held

If you want to personalize your Presence window to include just the contacts that you need, then you can do this in the Presence settings page under the Settings menu (in the Phone window). The other styles that you can choose, instead of extensions, are Users or custom. The user list is for hotdesk oriented sites. These are sites where staff move around and hence the list is oriented toward who is available and where they are, rather than which extension is available. In user mode, the Users are shown as colored "chess pawns" instead.
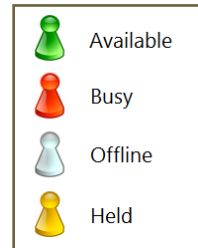
The final mode, Custom, offers the most flexibility. This mode allows you to choose exactly who appears on the Presence list.

Settings and configuration

The Settings menu contains many options that you can change to improve your enjoyment of PHONE-LiNK. Let's take a look at some of the more common ones. If you select the Settings menu item at the Main menu then you are given a page with six more options. There are actually two pages of options, so to access the other pages of options you can use the left/right buttons in the top right hand corner.

System settings

When you first install PHONE-LiNK, it takes you through an installation phase where you need to tell it your telephony server's address and your extension number. When it does this, it presents the System settings page followed by the Telephony settings page, so you may have seen these before. You're not that likely to change these settings, but you might as well know what they do. Go into the settings page and you will see a series of tabs on the left hand side.

The first tab, Session, contains the details of your telephony server. If you have a Secondary server set, it is most likely because you are a laptop user and this is the IP address that you reach the server on over the internet. Unless you understand the settings here then don't change them. To have the software start automatically when you log on to Windows, put a tick in the tickbox. The setting will take effect next time you log on to Windows.

The next tab is the User mode tab. This allows PHONE-LiNK to support a number of different operations. Most users log in to their PC as a name (or username) that is the same, or similar to their own name. Or in other words, they log in as a name that uniquely identifies them. PHONE-LiNK can take advantage of this to associate this user name with the extension that the user is logging in as. This behavior, of associating the user and the extension number, gives PHONE-LiNK some powerful functionality such as "hotdesking" where other others can reach you, by name, even if you temporarily use another PC. If you like this functionality, but don't use "unique" usernames (i.e. you log into your PC as something like "user" or "technician") then you can still use it by manually declaring your username and password on the User tab. (Your administrator will have to create a user on the telephony server for you first). Finally, if you want to be completely anonymous as a user on your network, then you can choose not to log in. Be careful if you use this, though, because there are some features in the software required a logged in user to work.
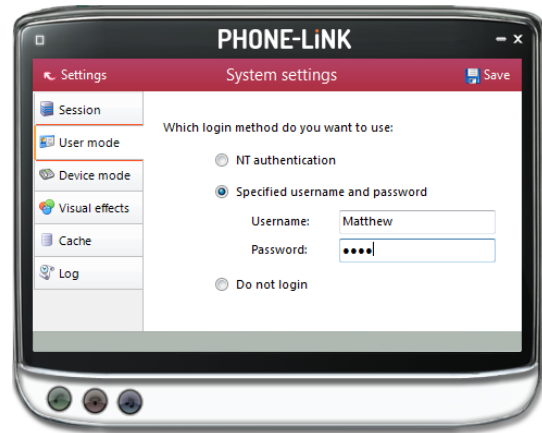
The next tab, Device mode, is useful when several people share the same PC. Read the two choices and select which one best fits your mode of working. On the tab below you have got the Visual effects which can be enable or disabled. Next Cache tab has buttons you can press to quickly and securely clear the history of all CRM contacts from your call history, recent numbers (as shown in the Recent list), and which hints the software has shown you (clearing hint history allows the software to show you the hints again). Finally Log tab contains all of the connection, session and login details, providing you with the information helpful in diagnosing any PHONE-LiNK related problems.

Telephony Settings
"Telephony settings" is the place where you enter your extension number. You can also use this screen to diagnose problems in case your extension stops working with PHONE-LiNK Server. The Log tab should contain information that would be useful in diagnosing any problems.

Dialing Settings

The Dialing settings are covered in an earlier section, Making calls. Refer back to that section for a description of this option.

CRM integration

The CRM Integration page allows you to configure telephony integration with supported databases. Integration enables contact popping and caller preview when a call is made or received, and address book searching

To make a new integration, select the type of database from the dropdown list, and click Configure. For applications like Outlook (see Outlook settings), the software attempts to find and use default settings that will "just work" for you, so you won't need to do anything more. For more complicated databases, the software will do as much as it can for you, but you may need to help it by for example entering your password, or telling it where the database files are, etc.

The Integration "Quick test" tab allows you to test the settings you have entered by entering a telephone number and seeing if the software can find it. If the number is found, you can click the Show contact button to make sure that "popping" works. Log tab will help you to diagnose any CRM integration related issues.

When you are done, click Save. The new integration will be available immediately.

Outlook settings

Outlook integration is a separately licensed module. If you do not have the license then this functionality will be disabled. It may be possible for you to try the functionality out on a time limited basis. Please see your administrator for further details.

When the integration is enabled you can select the Outlook Profile that you would like to use. On the "Folders" tab you can choose which folders will be used for searching of the active Contacts, Appointments and Tasks. Or choose the (Default) settings which should make the integration work just fine. Log tab will help you to diagnose any Outlook related issues.
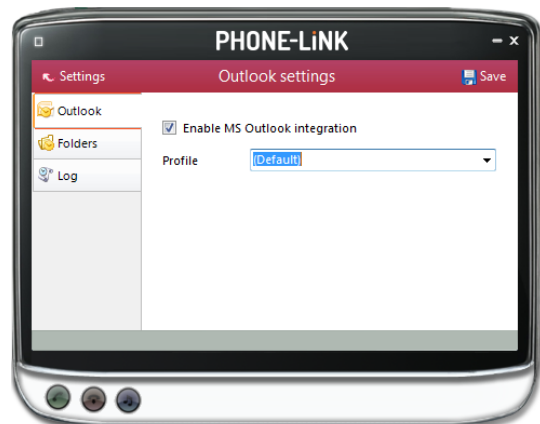
To best use Outlook functionality, it is recommended that you set your "Home page" to the "My photos" option. This will style has the option of displaying upcoming appointments in the best format.

Customize buttons

The customize buttons screen allows you to configure two main sets of options. Firstly, you can configure one or more of your function keys to act as "hotkeys" for PHONE-LiNK. For instance, you could set your F2 function key to answer your phone calls. Then, as long as PHONE-LiNK is running, the F2 key will answer calls for you, even if you can't see the Phone window. When you choose a key, remember to pick one that is not used in other applications, as its function will be disabled elsewhere.

The second tab provides a way of configuring the two silver buttons at the bottom of the Phone window. If you haven't seen these buttons yet, it's because you don't have anything configured.

There are a number of actions available to use as buttons, most of them are fast ways in getting around PHONE-LiNK. One that might be particularly useful is "run application". This allows you to configure one of the buttons to directly run a third party application, such as one you might write yourself.

Home page settings

The Home page button screen is on the second page of settings, so you will need to use the page right button to get to the option. You can configure PHONE-LiNK's main menu (or home page) to provide you with topical information, such as news or upcoming appointments. This is done by changing the "style" of the home page. The default option is the traditional six item menu. This can be changed to the "my photos" option which will show a random picture (changing every minute) from your My Pictures folder on your PC. It will also show upcoming appointments or other information based upon the settings underneath. (These settings require the optional Microsoft Outlook integration).
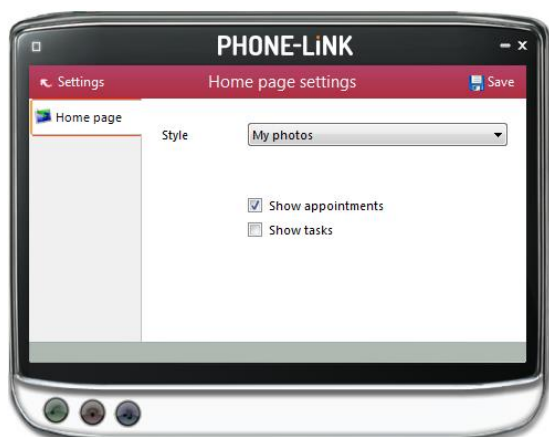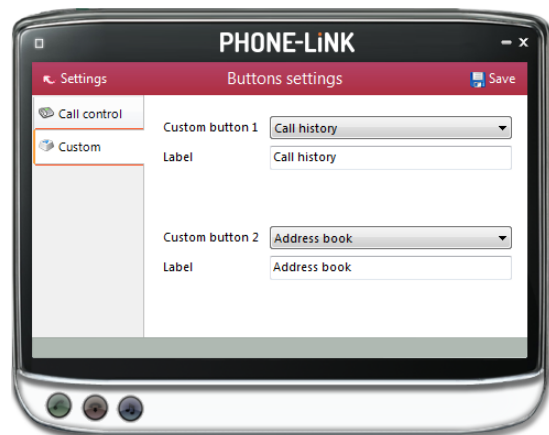
Interface settings

The Interface page allows you to change settings relating to the look and feel of the software, including actions that happen when calls take place.

Out of office tab allows you to enter the personal message that will be visible to other users. Ticking the box will activate and un-ticking the box will deactivate the message shown to your colleagues.
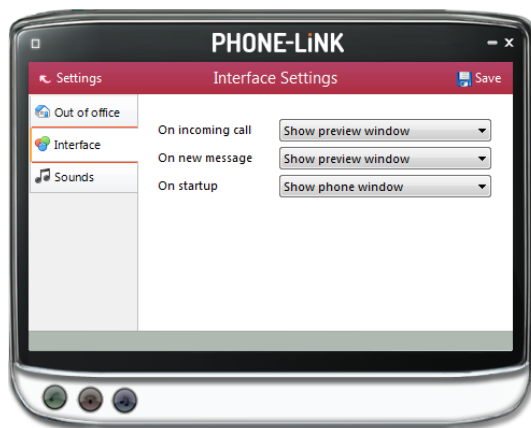
The Interface tab allows to automatically show the preview window or the phone window when an incoming or outgoing calls is received or made, helping you to dial and answer the calls in the way that is most convinient for you.You can also choose to see the phone window on the start up.

Sounds tab on the Interface page allows you to choose a sound to have your computer play when your phone is ringing and/or you have a call waiting. This can help you to uniquely identify that it is your phone that is ringing and not a colleague's. You can also tick the box to have your computer's sound automatically muted whenever a call is in progress, which is useful if you listen to music or Internet radio while you work, giving you a more professional appearance.

Versions

The chances are you will never need to look at these pages but it is best you know what they are for, just in case.

Most software these days consists of several small programs and libraries that form a whole and PHONE-LiNK is no different. The **Version information** page lists the version used for each component part that makes up PHONE-LiNK. This information can be used to track down any rogue element that perhaps hasn't updated correctly or to provide clues to a problem's cause. Should something like that happen you could click the **Copy to clipboard** button and then paste the info straight into a document or email.
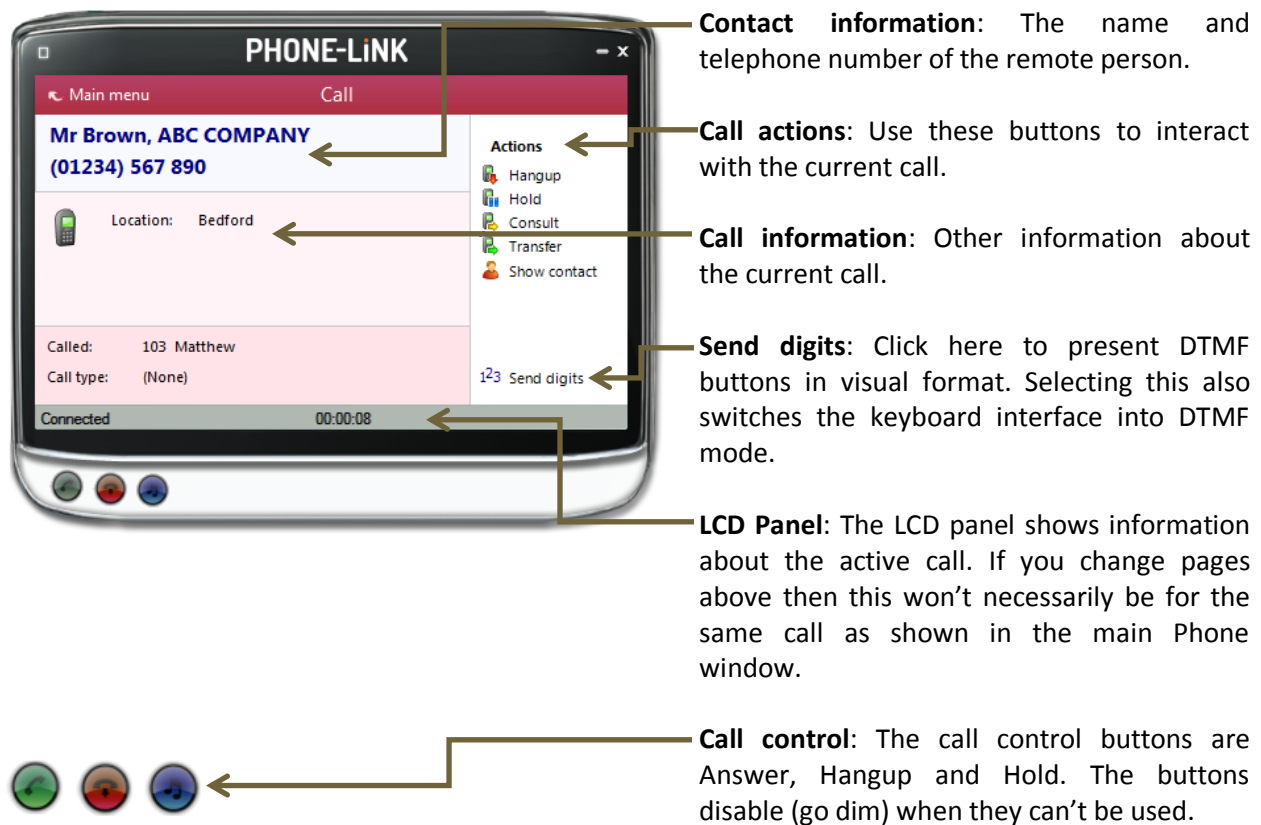
The **Devices** tab shows the devices that are being used; this could include hardware and any apps that you have integrated with PHONE-LiNK.

The panel below shows the **Log** entries and keeps a record of what PHONE-LiNK attempts to do and whether it was successful or not. This information can be very useful when troubleshooting an issue; click the **Copy to clipboard** button and paste the info into a document.

Call control

By now, you will probably have seen the Call screen in the Phone window a number of times. It appears when you make or receive a call. Let's take a moment to review the items on the screen.

Contact information: The name and telephone number of the remote person.

Call actions: Use these buttons to interact with the current call.

Call information: Other information about the current call.

Send digits: Click here to present DTMF buttons in visual format. Selecting this also switches the keyboard interface into DTMF mode.

LCD Panel: The LCD panel shows information about the active call. If you change pages above then this won't necessarily be for the same call as shown in the main Phone window.

Call control: The call control buttons are Answer, Hangup and Hold. The buttons disable (go dim) when they can't be used.

As you can see, the Call screen allows you to interact with the current call in a number of ways. One of the most common ways is to click on the Contact information or the Edit contact button to apply a name to the person you are speaking to. This was covered in an earlier section, Address books.

It is also common to use this screen to perform a transfer of the current call to another extension or user. To do this you must be Connected to the call (as opposed to it being on Hold or Ringing). When you are Connected then the Actions list looks like the above example. To transfer a call you do NOT press the Hold button. The Hold button has a different purpose (more about his later). Instead you either press the Consult or Transfer button. You choose the button according to whether you want to speak to the other person (Consult) or not (Transfer).

You are then presented with a screen like the Make call screen, but with the word Consult or Transfer at the top. Your call is not on hold at this stage yet, but when you are ready, type the number to transfer to (or choose one of the dialing options) and if you are Consulting then the original call will be put on Hold pending transfer (the pending transfer bit is important). If you are transferring then the call will be put straight through (remember to say goodbye first).

You can also transfer calls by using the Presence window. This feature is covered later in that section.

Transfer mode versus DTMF mode

When you are connected to a call, you can also use the numbers on your keyboard to begin a transfer. When you press the first digit then the screen switches to a transfer screen.


If you prefer, then you can actually use the keyboard to send DTMF tones instead. Press the Send digits button below the list of actions and you switch to DTMF mode. You can now send DTMF tones by pressing the digit buttons in the call window or pressing number keys on the keyboard. As you press each digit, a small status window will appear to help you keep track of what you have pressed.

More call control

We've seen what you can do with a connected call. Can you interact with other calls? Yes, when a call is ringing, you can choose to answer the call or Deflect it (transfer it without answering it) to another extension. Deflecting a call is done in a manner similar to transferring calls. If you want to use this feature, then why not go ahead and try it out now. Phone in from your mobile and see how it works and then you'll be ready if you need to deflect a call for real.
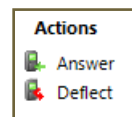
Deflecting calls is not just used to avoid work. If you are already on the phone and someone else phones you, then you can use Deflect productively to move the call to a colleague who can tell the caller to wait for you to become available.

Note: Deflect works differently according to your phone system. On some phone systems, your extension may continue to ring during a deflect. If it does, then it should ALSO be ringing at the destination that the call is deflected to.

You can also put calls on hold. Depending on your telephone system, this means that the other person should hear music. When you are ready to talk to them again, use the Unhold button. Remember, the Hold button is not for transferring calls. It is purely to pause the call. If you want to transfer a call that is on hold, then first you will have to take the call off hold first.
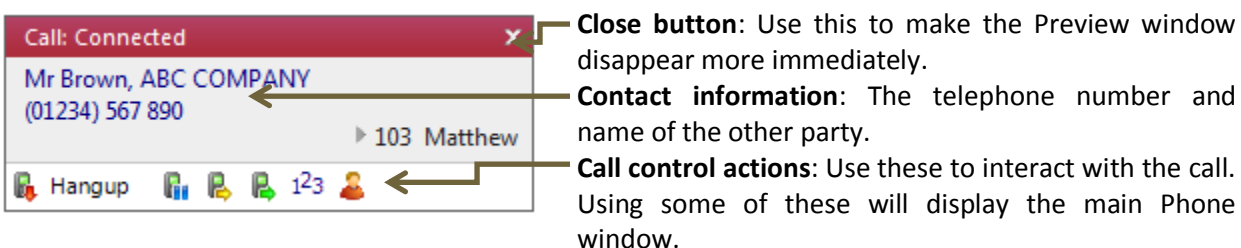
Note: On some phone systems, you may not be able to put internal calls on hold.

Preview window

If you are not using the preview window yet, you probably should be. Previewing can be configured in the Interface Settings. Go to the Interface tab and choose the Preview window to be shown on New calls and, depending on your preference, New messages too.

Done that? Great. So make a call in to your extension again and the Preview window should appear. It contains much of the information from the main Phone window, but in a much more compact format. Plus it will disappear shortly after a call connects.

Let's review the main parts of the window:

Close button: Use this to make the Preview window disappear more immediately.

Contact information: The telephone number and name of the other party.

Call control actions: Use these to interact with the call. Using some of these will display the main Phone window.

Like the Phone window, the actions at the bottom of the preview window adapt to the state of the call. The example picture shows the actions that are available when a connected call is in progress. To conserve space, the text is only shown for the first action. The rest are depicted by their icons only.

Note: For consistency with the Phone window, the Consult button is listed before (to the left of) the Transfer button. They both have the same icon.

Previewing messages

You can also use Preview windows for text messages, especially if you receive a lot of short messages. The Preview window will remain on the screen when you receive a message until you chose to Close, Delete or Reply to it. If the text is too large to display in the Preview window then you can click on the background area to show the message in the Phone window instead. When you display messages in the Phone window, then you also get to see the previous messages in the thread.

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