Smart Office Desktop Quick Reference Guide

Avatar and Online Status

davidavrum@ptrials.com

About

Available	✓
Busy	⊖
On Vacation	⊖
Away	🕐
Out to Lunch	🕐
Be Right Back	🕐
Appear Offline	✕

Setting Your Presence
Presence is an easy and effective way to see the status of colleagues. To set presence click on the avatar and choose from the dropdown menu.

Profile

🔍 Contact ➕

Favorites ★

B

Directory 👤 — Bond, Jim

Chat 💬 — Bozena, Milana

Send Message
Audio Call
Video Call
Open Profile
Delete Contact

History 🕐

H

Sessions 📅 — Hung, Chi

Dialpad ⌨ 15

P

Collaboration 👥 — Pang, Yee Loy

Custom Tabs 🌐

S

Shivali, Sashi

A B C D E F ... O P Q R S T U V W X Y Z #

Services

📞 Call Grab
service

📞 Voicemail
service

Settings ⚙

Contact Action Menu

Logging In
Enter your administrator provided Username and click NEXT. If you are enabled for single sign-on (SSO), login with your corporate credentials to authenticate & complete login. If you are not enabled for SSO, enter your password and click LOGIN.

Username

NEXT

Send Feedback or Logs

Username
davidavrum@ptrials.com

Password
•••••••••

☑ Remember me **LOGIN**

Use another user name

Send Feedback or Logs

Interacting with Contacts
Initiate instant messages, audio calls, and video calls by clicking on contacts that are in favorites, directory, and history. See their phone & online presence & choose the best way to interact.

Application Settings ✕

Language Settings
○ Deutsch
● English
○ Español
○ Français
○ Português
○ 日本語
○ 한국어

Display mode
○ Dark
● Light

☐ Enable Skype for Business Presence
Skype UserId

Skype Password

Click To Call Setting
☑ Confirm call

CANCEL **ACCEPT**

Device Settings ✕

Microphone Source
Headset Microphone (Logitech H820e) ▼

Microphone Sensitivity
───────●── **TEST**

Audio Device for Alerts
Headset Earphone (Logitech H820e) ▼

Speaker Volume
────●────── **TEST**

Audio Device for Calls
Headset Earphone (Logitech H820e) ▼

Speaker Volume
────●────── **TEST**

CANCEL **ACCEPT**

Service Settings ✕

Select the service you want to see in your favorites

Services
☑ MeetMe Audio Conference
☑ My MeetMe Conference
☑ Call Grab
☑ Voicemail

Setting Your Preferences
Add new contacts, contact sorting options, device settings for speaker, mic & webcam. Application settings control language, light or dark theme, etc.

Milana Bozena — □ ✕

M Milana Boze
milanabozena

AUDIO ANSWER

VIDEO ANSWER

DECLINE ▼

Receiving a Call
A dialog box appears in the bottom right-hand corner of the screen when an incoming call is received. Choose to accept, decline, or ignore the call. If the incoming call is video enabled, a triangle symbol offers the option to choose whether to answer with audio or video.

⭐ Creating Favorites

Adding favorites creates a quick way to check the availability (presence) of co-workers and quickly connect. Right click any favorite to send message, make audio/video call, view their profile or delete contact.

Search

Click + to Add New Contact
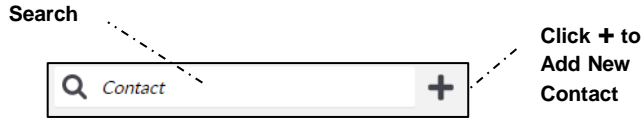
Add a favorite from Directory:
1. Search for a contact in the Directory tab, select the contact and right click on the contact's name
2. Select Add Contact
3. Check Show Availability
4. Click Accept
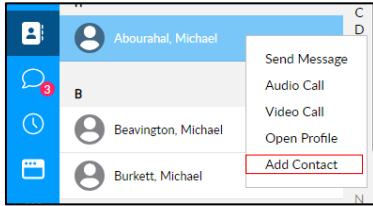
📇 Directory

Access Global Address Book to easily find and add contacts as favorites. Click any contact to open their profile & view details, click to start audio call, video call, chat and click to email. Right click any entry to send message, make audio/video call, view their profile or delete contact.

**Profile**

Sara Hughes
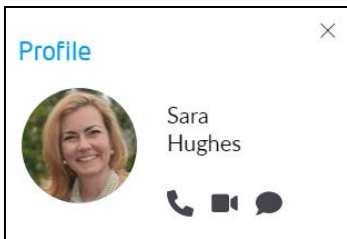
💬 Chat

The Chat tab provides a history of conversations and also provides notification of unread chat messages. Click a listing in the history to continue the conversation or right click on a contact to delete the conversation. You can also search the Chat history to locate a conversation.

Additional Icons

Additional icons may appear on the left margin based upon your administrator or enterprise settings. (training, help, portals)

🕐 History

Users can access their call, chat & collaboration history and access an action menu by right clicking on the entry to send message, make audio/video call or Add to Favorites. Missed calls will show as a number next to the history icon. Click the down arrow to filter by type or date.

🔍 Search

2020/12/2   2021/2/18
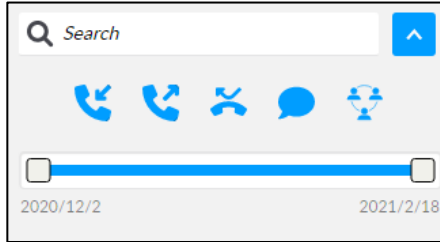
🗓 Finding Open Sessions

The sessions tab shows all of the open sessions making it easy to switch between active conversations. Active Calls show phone icon. Active chat sessions show chat icon. Select any entry to bring that window to the foreground.

⠿ Dialpad

Use the dialpad to make audio or videocalls. You can click to enter number or paste numbers to call. Click the voicemail icon to check voicemail messages. A number will appear next to the dialpad icon with the number of unheard voicemail messages you have.

Conversation Controls

Click on a contact to open a conversation window. Easily start an instant message, send emojis or use these controls to make an audio call, video call, or invite the contact to collaborate. When your have an active call, click the three dots to place the call on hold or initiate a transfer.

Additional Functions

Transfer to a New Call

Hold
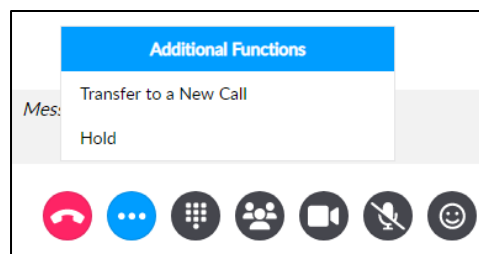
Call Controls

Manage audio & video, launch the dialpad, send a collaboration link or access additional features using the call controls at the bottom of the conversation window.

End Call	More	Dial Pad	Send Collab Link	Video	Mute	Emojis
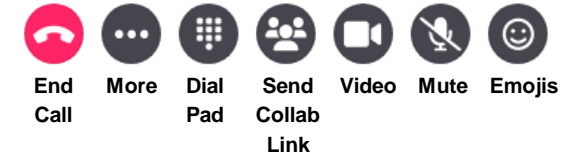
👥 Collaboration (optional)

Start a Smart Office Collaboration session, copy your collaboration room details to paste in another application or invite participants via e-mail.

Smart Office

START COLLABORATION

You can also send an automated invitation

Invite by Email

Copy your collaboration room details by clicking on the clipboard icon

URL
https://pa-ucc.genband.com/collab/davidavrum@ptrials.com

Access code
47384377

Dial In Number
2663