NEC Desktop Suite User Guide

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Desktop Screen Overview

- Personal Presence
- ACD Menu
- Main Menu
- Active Call Window
- Presence Button
- Park Toolbar

Presence States and BLF Colour Descriptions

Presence States

- In the Office
- In a Meeting
- Out to Lunch
- On Vacation
- Unavailable
- Out of the Office
- Business Travel
- Sick Leave
- Gone for the Day

Busy Lamp Field Colour Descriptions

- Grey: Idle
- Green: On the phone
- Blue: Call forward
- Red: Do not disturb
Managing Calls Using Desktop Suite

Make a Call

You can make a phone call right from the Desktop Suite using the Dial button on the main tool bar.

1. Press the **Dial** button on the tool bar

2. Enter the number you would like to dial in the **Destination Field**

3. Press the **Start** button to initiate the call

Put a Call on Hold

Once you have a call in your **Active Call Window** you can use the **Hold** button on the main toolbar to place your caller on hold.

1. Ensure you have a live call in your **Active Call Window**, as seen below. Active calls have a **Green** border

2. Press the **Hold** button on the tool bar

3. The call will drop below the **Active Call Window** and have a **Yellow** border. This indicates the caller is on Hold

4. To retrieve the held call simply **Double Click** on it
Call Transfer

Initiate transfers in the desktop suite using the Transfer button the tool bar

1. While on an active call press the Transfer button on the toolbar

2. Enter the extension or phone number you would like to transfer in the Destination Field

3. Next you have 2 options. Press Start to begin a Supervised Transfer - this allows you to talk to the person you are transferring too prior to putting the call through. Alternately press Blind to complete a Blind Transfer - this is where the call is taken directly from you and rings to the person you are transferring too. If you select Blind your transfer is complete and you do not need step 4.

4. Once you have the person you are transferring to on the line press the Complete button to complete your transfer. If the person does not pick up you have the option to press Voicemail to put the caller directly into their voicemail instead.
Call Park

There are 2 ways to Park an active call using the Desktop Suite.

1. With an active call press the Park button on the toolbar and enter a Park Location OR
2. Press the Valet button at the bottom of the desktop window and the Race Car Icon will move to the Park Location for you.

Conference Calling

Using the Conf button on the toolbar you can achieve three way calls.

1. First you need to connect with the first caller. Dial their number or press their Presence Button to get them on the line.
2. Next, press the Conf button on your toolbar
3. In the Destination Field enter the extension or outside number you would like to join the conference then press Start
4. Your first caller will be put on hold while you speak with the second caller. Press Complete to join the 2 calls together or press Disconnect if the second person declines the conference.
Directed Call Pickup

Use the Desktop Suite to answer another phone in the office that is ringing without leaving your desk.

1. From the Toolbar press the **Dir. Pickup** button

   ![Dir Pickup](image)

2. Enter the **Extension** you would like to pick up

   ![Select Pickup Type](image)

3. Press **Start**

Last Number Redial

Dialing the last number you dialed is easy using the toolbar

1. Press the **Redial** button on the toolbar

   ![Redial](image)

2. You will be connected to your previously dialed number
Presence

Your **Presence Status** appears to all other users with the Desktop Suite on your **Presence Button**. This allows your colleagues to see where you are, when you’re due back and notes on how to reach you if necessary.

Setting Your Presence

While you’re setting up your **Presence Status**, the desktop suite allows you to update your **Call Forwarding** or **DND Status** as well, saving you a step.

1. Click the Presence Dropdown at the top of the desktop screen

2. Select your desired **Presence Status**. Some examples are: **In a Meeting**, **On Vacation** or **Out of the Office**.

3. Complete the **Set Presence** window

   - **Subject**
   - **Location**
   - **Presence State**

   **Phone Settings** allows you to choose your **Call Forward** type and destination, or turn on **DND mode**.

   - **Expected Return**
   - **Remarks**

   The **Remarks** field lets you leave specific notes or call handling instructions for your team.

Use the **Subject**, **Location** and **Presence State** fields to let your colleagues know where you are.

Set your **Expected Return** date/time so everyone knows when you’re back.
Call Forwarding

There may be times you wish to set up a Call Forward without changing your Presence Status.

1. Press the Forward button on the toolbar

2. Select Set Call Forward

   Enter an extension number or the outside number you would like to forward to in the Destination field

3. Complete the remaining fields as noted above, then click Start

   Note: To cancel your Call Forward simply press the Forward button on the toolbar and select Cancel Call Forward

DND

Do Not Disturb takes your calls and points them directly to voicemail without ringing your phone.

1. Press the DND button on the toolbar

2. Select Set Do Not Disturb and using the dropdown what types of calls you would like the DND to apply to (internal, external, all, etc)

3. Press Start

   Note: To cancel DND press the DND button on the toolbar and select Cancel Do Not Disturb
Instant Messaging

The **Instant Message** feature of the desktop suite allows you to have an ongoing text-based conversation with another user logged into Desktop. A user’s name will be highlighted in **Yellow** on their **Presence Button** when they are logged in and available to IM.

1. Press the IM button in the toolbar.
2. Select the user you would like to IM from the Participant window. **Note:** Only users logged in to Desktop will appear on this list.
3. Press the Start button to begin the Instant Message.
4. The instant Message Window opens.

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**Chat and Messaging Functions**

**Enter your message here and hit the Enter key or Send button to send it.**

**The Status Bar indicates if the user has accepted your IM request.**

**Your messages will appear here.**
Quick Message

The Quick Message feature allows you to send a logged in user a quick predetermined message with built in response options for common place items such as their meeting arriving, or a call waiting.

1. Click the Quick Msg button on the toolbar

2. The Quick Message window opens

   Click the **To:** button and select your recipients from the list of users logged in. **Note:** You can send quick messages to more than one user at a time

   Select your **Message** from the dropdown. For example: "**<Someone> is on the phone**". The cursor will go to the **<Someone>** placeholder and allow you to enter a name

   Select what **Responses** you would like the user to be able to choose from. Some of these will be auto populated, or you can enter your own.

3. Hit the Send button to send your message

4. The quick message appears under your Active Call window. If you send the message to multiple users a Quick Message Bubble will appear for each extension.

   Each **Quick Message Bubble** indicates the extension the message is for.

   The **Response:** field will populate when the user selects one of the response options you provided

5. 
Display Message

The **Display Message** option allows you to program a preset greeting to appear on the screen of your phone when you’re away from your desk, giving details to anyone looking for you at your desk.

1. Press the **Display Msg** button on the toolbar

2. The **Display Message** window opens

3. Use the dropdown to select the **Message** you would like to display

4. Use the **Date**, **Time** and **Number** fields to fill in any blanks in your chosen message.

5. Press the **Set** button to complete, or if you already have a **Display Message** set up press **Clear** to clear it.

Your **Display Message** displays on the phone until you clear it.
Outlook Integration

Dialing from Outlook and Transferring to Outlook Contacts

There are 3 ways to dial from outlook. Methods 1 and 2 also work for transferring calls to contacts if you have already connected to a call.

Method 1: Right Click

1. From the Contacts page in outlook Right Click on the contact you would like to dial

2. From the dropdown select NEC UC Desktop then NEC Call and chose the number you would like to dial

Method 2: Outlook Toolbar

1. From the Contacts page in outlook select the contact you would like to dial with a single Left Click

2. From the Toolbar use the Dial dropdown and select the number you would like to dial
Method 3: Highlight-To-Dial

1. **Double click** on the **Contact** in Outlook to open it

2. **Highlight** the phone number you would like to dial

3. Press your **Highlight Dial Shortcut** (default is **CTRL+F1**)

   **Note:** You can update your **Highlight Dial Shortcut** in Desktop- see section Desktop Customization for more details.

Creating Speed Dials from Outlook Contacts

You can add Speed Dials to your UC Desktop window using your outlook contacts. These speed dials appear on a Speed Dial tab located next to your BLF Tab.

1. From the **Contacts page** in Outlook Right Click on the contact you would like to add to Speed Dial
2. Select NEC UC Desktop from the drop down

3. Click NEC Add to Speed Dial
4. The contact is now added to your speed dial tab

Highlight Dial

Highlight Dial works with many types of documents such as web pages, spreadsheets and CRM applications.

1. Highlight the number you would like to dial
2. Press your Highlight Dial Shortcut (default is CTRL+F1)

**Note:** You can update your Highlight Dial Shortcut in Desktop- see section Desktop Customization for more details.
Saving Profiles

Before you begin changing settings save a base profile you can revert to in case of trouble.

1. Select Tools from the Toolbar

2. Select Profiles

3. The Profiles window opens

4. Click the Save button and name your profile.
   
   **Note:** All users can see these profiles so use something unique to you to name your profile.

5. To apply the profile in the future simply select it from the list and click the Apply button.
Accessing the Preferences Menu

The Preference menu is where all your customization options reside in the Desktop suite. All following customization options require you to first access this menu.

1. Click the Tools button

2. Select Preference

3. 

4. The Preferences window opens

Use the Tabs to locate the features you would like to customize

Make sure to hit OK to save your changes

5. 

OK Cancel
Customizing the BLF/Presence Buttons

You can customize details on your BLF/Presence buttons by accessing the Preference Menu and selecting the BLF/DSS tab.

Use the Label Format and Name Display for BLF/Directory fields to personalize how you view contact names on your BLF/Presence buttons.

Use the BLF Appearance field to change the size of your BLF/Presence buttons.

Make sure to hit the OK button to save.
Customizing the Toolbar

The Tool Button tab in the Preferences menu allows you to add and remove buttons from your toolbar, reorder them and select icon size.

1. **Available Tool Buttons** menu allows you to select and deselect which options you would like to appear on the toolbar.

2. Use the **Move Up** or **Move Down** buttons to reorder the toolbar buttons from left to right.

3. **Image Size** menu to customize the size of your toolbar buttons.

4. Make sure you press the **OK** button to save.
Highlight Dial Hotkey Setup

From the Shortcuts menu you can

Use the **Highlighted Dial Shortcut** section to enable or disable the **Highlighted Dial** feature as well as select the **Hotkey**.

**Note:** Hotkeys for this feature can be **Ctrl+F1** through **Ctrl+F12**.

Make sure you press the **OK** button to save.
Instant Messaging Settings

Access the Instant Messaging tab to make changes to your IM preferences.

The **General** section allows you to change basic settings such as **Font Size**.

Use the **Auto Save** section to enable or disable the **Auto Save** feature and choose your **Save Location**.

The **History** section allows you to set the number of sessions to keep in **History** as well as other options.

**Notifications** allows you to choose **Alarm** and **Screen Pop** options for your IM's.

Make sure you press the **OK** button to save.
Customizing Quick Messages

In the Quick Message tab you can set up new Quick Messages as well as new Responses.

Setting up new Quick Messages:

1. Press the New button below the Defined Messages section

2. The Create a New Message window opens

3. Enter your Message and press the OK button

4. On the right of the screen check off the corresponding Responses or add a New Response using the below steps

Setting up new Responses:

1. Press the New button below the Responses section
2. The **Create a New Response** window opens
3. Enter your **Response** and press the **OK** button

![Create a New Response window](image)

Toggling Between Views

From the main toolbar you can select different modes to view the Desktop suite.

1. Press the View button on the toolbar
2. Select the mode you would like to activate. Mode descriptions are listed below

- **Standard View** is the default view. It is the only view that shows the **BLF/Presence** buttons
- **Toolbar View** only shows the main **Desktop Toolbar** across the top of your computer screen
- **Compact Phone** resembles a mobile flip phone for easy dialing