## Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome</td>
<td>3</td>
</tr>
<tr>
<td>What's New</td>
<td>3</td>
</tr>
<tr>
<td>Multimedia Messaging Service (MMS)</td>
<td>4</td>
</tr>
<tr>
<td>Call Switch</td>
<td>4</td>
</tr>
<tr>
<td>Selective Ringing on HUD</td>
<td>5</td>
</tr>
<tr>
<td>Promote Local Conference</td>
<td>5</td>
</tr>
<tr>
<td>Flip Screen Redesign</td>
<td>6</td>
</tr>
<tr>
<td>Expose Call Queue and IVR Numbers in the Caller ID List</td>
<td>6</td>
</tr>
<tr>
<td>Download and Install the App</td>
<td>7</td>
</tr>
<tr>
<td>System Requirements</td>
<td>7</td>
</tr>
<tr>
<td>Log into the TELUS Business Connect for Desktop App</td>
<td>8</td>
</tr>
<tr>
<td>Favorites</td>
<td>9</td>
</tr>
<tr>
<td>Contacts: Add or Update Your Contacts List</td>
<td>10</td>
</tr>
<tr>
<td>View Your Contacts</td>
<td>10</td>
</tr>
<tr>
<td>Updating Your Company Contacts List</td>
<td>10</td>
</tr>
<tr>
<td>Updating Your Personal Contacts List</td>
<td>11</td>
</tr>
<tr>
<td>Add a Contact</td>
<td>11</td>
</tr>
<tr>
<td>Edit a Contact</td>
<td>11</td>
</tr>
<tr>
<td>Delete a Contact</td>
<td>11</td>
</tr>
<tr>
<td>Adding a Photo Avatar to any Contact</td>
<td>12</td>
</tr>
<tr>
<td>Favorites: Create a List of Favorite Contacts</td>
<td>13</td>
</tr>
<tr>
<td>View Your Favorites List</td>
<td>13</td>
</tr>
<tr>
<td>Make a Call</td>
<td>16</td>
</tr>
<tr>
<td>Dynamic Active Calls Tab</td>
<td>16</td>
</tr>
<tr>
<td>HD Voice and Secure Call Indicators</td>
<td>17</td>
</tr>
<tr>
<td>VoIP Unavailable</td>
<td>17</td>
</tr>
<tr>
<td>When You’re on the Call</td>
<td>18</td>
</tr>
<tr>
<td>Call Management</td>
<td>19</td>
</tr>
<tr>
<td>Answer a Call</td>
<td>20</td>
</tr>
<tr>
<td>Pick up the Call</td>
<td>20</td>
</tr>
<tr>
<td>New Window for Each Incoming Call</td>
<td>20</td>
</tr>
<tr>
<td>Respond with a Courtesy Message</td>
<td>20</td>
</tr>
<tr>
<td>Screen Voicemail</td>
<td>20</td>
</tr>
<tr>
<td>Send the Call to Voicemail</td>
<td>20</td>
</tr>
<tr>
<td>Forward the Call</td>
<td>20</td>
</tr>
<tr>
<td>Call Recordings</td>
<td>21</td>
</tr>
<tr>
<td>View or Listen to a Message</td>
<td>21</td>
</tr>
<tr>
<td>To View Your Messages</td>
<td>24</td>
</tr>
<tr>
<td>Voicemail Preview</td>
<td>24</td>
</tr>
<tr>
<td>To Listen to a Voicemail Message</td>
<td>24</td>
</tr>
<tr>
<td>To Read a Text Message</td>
<td>24</td>
</tr>
<tr>
<td>To View a Fax</td>
<td>24</td>
</tr>
<tr>
<td>Send or Receive a Text Message</td>
<td>28</td>
</tr>
<tr>
<td>Hold an Audio Conference Call</td>
<td>28</td>
</tr>
<tr>
<td>Launch an Online Meeting</td>
<td>28</td>
</tr>
<tr>
<td>Send or Receive a Fax</td>
<td>28</td>
</tr>
<tr>
<td>View Your Call Activity Records</td>
<td>28</td>
</tr>
<tr>
<td>Personalize the TELUS Business Connect for Desktop App</td>
<td>28</td>
</tr>
<tr>
<td>Sound Menu</td>
<td>28</td>
</tr>
<tr>
<td>Calls Menu - Incoming</td>
<td>28</td>
</tr>
<tr>
<td>Calls Menu - Outgoing</td>
<td>28</td>
</tr>
<tr>
<td>Messaging Menu</td>
<td>28</td>
</tr>
<tr>
<td>Contacts Menu - Integrate with</td>
<td>28</td>
</tr>
<tr>
<td>Microsoft Outlook</td>
<td>37</td>
</tr>
<tr>
<td>Contacts Menu - Integrate with Mac Address Book</td>
<td>38</td>
</tr>
<tr>
<td>Join Now</td>
<td>39</td>
</tr>
<tr>
<td>Hotkeys</td>
<td>40</td>
</tr>
<tr>
<td>Mac Hotkeys</td>
<td>41</td>
</tr>
<tr>
<td>Support - Technical</td>
<td>41</td>
</tr>
<tr>
<td>Support - Send Product Feedback</td>
<td>41</td>
</tr>
<tr>
<td>About</td>
<td>42</td>
</tr>
<tr>
<td>Head Up Display</td>
<td>43</td>
</tr>
<tr>
<td>HUD Call Display</td>
<td>49</td>
</tr>
<tr>
<td>Active Call Layout</td>
<td>50</td>
</tr>
<tr>
<td>Park Locations at HUD</td>
<td>51</td>
</tr>
<tr>
<td>Check for Updates</td>
<td>52</td>
</tr>
<tr>
<td>Give Us Feedback</td>
<td>53</td>
</tr>
<tr>
<td>Log Out of the Desktop App</td>
<td>54</td>
</tr>
</tbody>
</table>
Welcome

The TELUS Business Connect® for Desktop app turns your PC or Mac computer into an all-in-one communication hub completely synced to your office network so you can collaborate with your colleagues and customers anywhere you have a broadband connection and a headset. You’re ready to communicate as soon as you log into your computer, no matter where you are.

It combines the call-handling power you expect from your desk phone with the collaboration tools you rely on most—like texting, conferencing, and faxing—so you can stay productive with fewer devices to worry about. The TELUS Business Connect for Desktop app is easy to install and even easier to use.

We’ll show you how.

What’s New

<table>
<thead>
<tr>
<th>What’s New</th>
<th>Version 9.2.3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Promote 3 Way Call</td>
<td>Promote a 3-way active call to a conference call.</td>
</tr>
<tr>
<td>Selective Ringing on HUD</td>
<td>Configure extensions allowed to ring your phone.</td>
</tr>
<tr>
<td>New Languages</td>
<td>Added support for Spanish and Italian.</td>
</tr>
<tr>
<td>Flip Screen Improvements</td>
<td>Improved user experience of the “Call Flip” feature.</td>
</tr>
</tbody>
</table>
Multimedia Messaging Service (MMS).

- Send and receive multimedia files
- File types supported for receiving: images, videos, files
- File types supported for sending: images
- Maximum MMS payload: 1.5 MB
- Learn more [here](#)

Call Switch

- Call Switch allows users to handoff an active call from one endpoint to another, e.g. from the desktop app to their mobile phone, from mobile phone to desktop app
- On-demand feature (will be enabled on account level, users with Call-Switch service feature turned on). Doesn’t replace existing Call Flip feature.
- Use case is instant switch between calls when you’re using multiple instances of TELUS Business Connect office apps on mobile devices and laptop, or you have two laptops and want to transfer the call to one of them
Selective Ringing on HUD.

- Selective Ringing allows an admin to select a group of extensions from his pickup list and mute their calls so they would not be displayed as incoming calls.
- Admins can mute any group member’s extension with one click.

Promote Local Conference.

- Promote Local Conference allows users to increase the number of conference participants (from a maximum of 7 participants to unlimited).
- All users in the Local Conference will be automatically transferred to a new common bridge, with unlimited participants possible.
- Also, “Invite to conference” functionality will be added directly to the conference screen.
Flip Screen Redesign.

- Simplifies the Call Flip experience to require only one button
- Add custom number option – can quickly enter number not on private list and flip call to that number

Expose Call Queue and IVR Numbers in the Caller ID List.

- The Caller ID drop down lists direct numbers assigned to Call Queues (departments) where the user is a member and direct numbers are assigned to IVR menu extensions
- Although IVR and Call Queue (CQ) numbers can be used as Outbound Caller ID with Office, these numbers have not been able to be used as outbound caller IDs on the desktop app (IVR and CQ direct numbers did not appear in drop-down list)

Additional numbers labeled Call Queue and IVR will be displayed in the dropdown list.
Download and Install the App.

It’s quick and easy to get the TELUS Business Connect for Desktop app installed on your computer. Before you start, check the system requirements to ensure that your computer can use the desktop app.

To download and install the TELUS Business Connect for Desktop app:

1. Log in to your TELUS Business Connect online account through Voice Manager.
2. Go to the Tools menu and select Desktop App.
3. Download the version of the app compatible with your computer, either PC or Mac.
4. Run the install wizard.

Now you’re ready to log into TELUS Business Connect for Desktop.

System Requirements

Your computer needs the following minimum requirements to best use the app:

**PC**
- Windows 7 (or later)
- 2 GHz (32-bit or 64-bit) processor
- Minimum 1 GB RAM
- 300 MB hard drive space

**Mac**
- Mac OS X 10.8 Mountain Lion or above
- Intel processor
- Minimum 1 GB RAM
- 300 MB hard drive space
Log into the TELUS Business Connect for Desktop App.

1. Click on your computer desktop.

   Enter the phone number and password you use to log into your TELUS Business Connect account. (Note: After a grace period of 30 days, alphanumeric passwords will be required, replacing numeric-only passwords. If you are signing up for new service, choose a strong alphanumeric password.)

2. Click Log In.

   Or, click Single Sign On and log in with your credentials to access the TELUS Business Connect for Desktop app, and all of your company applications with a single sign on.

Learn more about Single Sign On here.
Favorites

The TELUS Business Connect for Desktop app opens to the Favorites screen the first time you log in, and displays icons linked to everything else you want all on one screen. You can add a favorite from your list of contacts by clicking and selecting from your All, Company, Personal, or Outlook contacts lists using this filter.

Mouse over a name (E.g., Jen Williams) to reveal your contact options—Call or Text. Here’s a quick rundown on how to get around the app.

- **Your account Presence:** Set your availability status.
- **Messages:** View all your messages in one place. Messages are always current and synced from your other devices.
- **Favourites:** Add colleagues you contact often. See their Presence status and contact them directly from this screen.
- **Calendar:** Google Calendar or Outlook. iCal if you are using a Mac.
- **Call Log:** Review all call activity on your account.
- **Contacts:** Separate Personal and Company contact lists to make it easy to quickly find the right person.
- **Head Up Display:** Provides a single interface to manage incoming calls from the desktop; views Presence status of up to 100 users.
- **Dial pad:** Dial a phone number to make calls from this screen.*
- **SMS text messaging:** Send text messages to one person or a group.**
- **Online Meetings:** Launch Online Meetings to collaborate and share screens with remote colleagues or clients.**
- **Audio Conference:** Hold instant conference calls and easily invite up to seven participants.**
- **Fax:** Send faxes, schedule faxes, and select cover pages from this screen.
- **Settings:** Set your app preferences.

*Professional customers require a purchased number for making outbound calls from the app.

**SMS, Online Meetings, and Audio Conference are available on selected Office plans.

Note: Contacts and Favourites are now sorted by letters first, numbers next, and special/Unicode characters last.
Contacts: Add or Update Your Contacts List.

The Contacts list is your online address book. It stores your company contacts — everyone in your corporate directory, and your personal contacts — everyone else outside of the company, such as friends, family, and even vendors. Your personal contact list is clearly separated from your company contact list so there’s never any confusion when you’re looking for the person you want to contact.

View Your Contacts.

At the top of the screen, click 🔄 to open your contacts. Click the Filter icon ☑️ to select All, Company, Personal, or Outlook contacts. Click on a contact to see its Presence status.

Updating Your Company Contacts List.

Good news! There’s no need to manually update your company contacts. Your corporate directory is synced to your company’s main Business Connect account and continually updated so you always have the latest contact information for your entire company.

Did you know?

You can call or text your contact directly from your contacts list. Just click the name of the person you want; then click any one of these icons:

- To call, click 📞
- To text, click 📩
 Updating Your Personal Contacts List.

Your personal contacts may already be synced to your mobile phone or Microsoft Outlook, but you can also manually add, edit, or remove a personal contact at any time.

**Add a Contact.**

1. At the top of the screen, click 🔄.
2. Click the filter and select Personal.
3. Click 🔄 at the top right corner to open the Add Contact screen.
4. Fill in any of the information fields you want, such as name, email address, and a phone number or two. You can always come back and add more details later.
5. Click Save. The page refreshes and displays a summary of the contact details.
6. Click ← to return to the full list of Personal contacts.

**Edit a Contact.**

1. At the top of the screen, click 🔄.
2. Click the Personal tab.
3. Click the name you want to edit.
4. On the Contact Details screen, click 🔄 at the top right of the screen.
5. Make the changes you want to any of the contact details.
6. Click Save.

**Delete a Contact.**

1. At the top of the screen, click 🔄.
2. Click the Personal tab.
3. Click the name you want to remove.
4. On the Contact Details screen, click 🔄.
5. Click Delete.
6. In the confirmation box, click Delete again. The contact is permanently removed from your Personal contacts list.
Adding a Photo Avatar to any Contact.

The TELUS Business Connect for Desktop app seamlessly integrates with Microsoft Outlook and Mac Address Book so you can easily import contacts into your desktop contacts. If there are pictures in these contacts, the photos will display in your contacts list.

When you have a lot of contacts, sometimes it’s easier to recognize the contact you want when you have a visual hint to jog your memory. The TELUS Business Connect for Desktop app lets you upload any photo or graphic to use as an avatar, which displays next to the name of the contact. For example, you can upload a photo of the person or an image file, like a logo or animal, to represent the person to you.

The avatar is visible only to you, while you’re using the desktop app. Any image you use won’t be seen by the person you’ve contacted. This is different from a profile image you might have used to display publicly. This avatar is for your personal recognition use only.*

Here’s how to add an avatar:

1. At the top of the screen, click 📸.
2. Click the filter icon 📦 and select All, Company, Personal, or Outlook.
3. Click the name of the contact to which you want to assign an avatar.
4. Click 📸 next to the name. The Add Photo screen opens.
5. Click to add photo. Find the image file you want to use.
6. Click Save. You should now see your uploaded image next to the contact name.
7. Click ← to return to the full list of contacts.

*Note: Your personal profile image will be synced across The TELUS Business Connect cloud, and desktop and mobile app. Your profile image in company contacts will also be synced to the desktop app. However, your newly added photo will not automatically replace the one for you that was manually added earlier by your contacts. Cloud contacts added locally do not affect Favorites from external sources such as MS Outlook and OS X contacts.
Favorites: Create a List of Favorite Contacts.

The Favorites screen is a shortcut to your most frequently used contacts. You can add up to 60 contacts from your Personal list or Company list. Since it’s a shorter list, you can find the person you want faster.

Additionally, when you add a Company contact in your Favorites list, you can see their phone Presence status. This status shows whether the person is available to take calls. Presence status is available only from your Favorites list and available only for Company contacts.

View Your Favorites List.

At the top of the screen, click or . The Favorites screen opens, showing all of your existing favorite contacts.

Make a Contact a Favorite.

1. At the top of the screen, click or .
2. Click and select Personal or Company.
3. Click the name you want to add to your Favorites list.
4. Click next to the name.

The open star ( ) changes to a filled star ( ). Your contact was successfully added to your Favorites list.

Did you know? You can call or text your contact directly from your contacts list. Just click the name of the person you want; then click any one of these icons:

- To call, click
- To text, click

Google Contacts Integration.

It is now possible to view your Google contacts from inside the desktop app. You can also select and move Google contacts one at a time.

Remove a Favorite Contact.

1. At the top of the screen, click . All of your existing Favorites are shown.
2. Click at the top right of the screen.
3. Find the person you want to remove, and click next to the name.

The contact is removed from the screen but you can still find them in your general Personal or Company list.
View Presence Status of a Favorite Contact.

The Presence status lets you know if one of your Company contacts is available to take a call or not. Presence status can only be shown on your Favorites screen so you can’t see Presence status from your Company contact list.

To view Presence status:

1. At the top of the screen, click ⭐. All of your existing Favorites are shown.
2. Look under the contact name:

- A green dot (●) means the person is available. Go ahead and give them a call.
- A red dot (●) means the person is busy, often already on a call
- A red dot with a white bar (●) means Do Not Disturb
- A gray dot (●) means the person is invisible (offline)
Set Your Own Presence Status.

You can set your own Presence status so other people in your company can quickly tell if you’re available or not to take a call. Here’s how:

1. Click your phone number at the top left of the page. A dropdown screen displays, showing your name and current availability.
2. Do any of the following:
   - Set your availability status: click Available, Busy, or Offline
   - Comment on your status: Click directly under your name. Type a brief comment, such as In a Meeting.
   - Decide whether you want to take calls (Accept Calls) or send them directly to your voicemail
   - Click Save to save your changes

Now your Presence status will stay that way until you change it again. You can change your status as often as you like.
Make a Call.

You can use the dial pad to make a call, either to a person in your Contacts list or by manually dialing a phone number.

To make a call:
1. Click at the top menu to bring up the Dial Pad.
2. In the To field, either click to select a contact, or click the digits on the dial pad to manually dial a phone number. You may also type the user’s name in the To field and the system will complete the entry if the person’s name exists in your corporate directory or in your contacts.
3. Click the caret on the Caller ID line to select the phone number you want displayed to the receiver of the call.
4. Click the green call button to place the call.
5. When the call goes through, the caller’s screen will change to Active Call, shown at right, and display either the called phone number or extension number if the call is to an internal number.

**TIP:** You can always make a call directly from your Contacts screen, too. Just click the name you want to call and your call will connect from the screen.

Dynamic Active Calls Tab.

- Only the dial pad is shown when no active call is in progress
- Active Call tab appears only when an active call is in progress
HD Voice and Secure Call Indicators.

- HD Voice provides optimum call quality automatically between devices that support high definition
  - The TELUS Business Connect solution employs the Opus codec, which provides greater voice clarity, especially in limited bandwidth and network environments
- Secure Voice calls are supported between devices capable of that feature*

VoIP Unavailable

A warning shows when VoIP calling is unavailable.

*Secure Voice can be obtained after contacting your account manager.
When You’re on the Call.

When you’re on an active call, the on-screen options make it easy to manage your call. You can:

- **Mute the call.** Click again to unmute so your callers can hear you speak.

- **Access the Keypad** so you can enter numbers or a code while on a call.

- **The Audio button** allows you to customize your sound settings while on a call.

- **Put the call on hold.** Click again to return to the call.

- **Immediately start recording the call.** Your caller hears a message letting them know they’re being recorded. Click **Stop** when you no longer want to record the call.

- **Add more people to the same call.** You can add up to four people.

- **End call.**

Transfer the call to another colleague or phone number. There are three types of transfers:

- **Warm Transfer** puts the call on hold so you can talk to your colleague before transferring

- **Blind Transfer** simply connects the caller directly to another extension

- **To Voicemail** causes immediate transfer of the caller to a designated voicemail box

Allows you to transfer (Flip) a call to another phone, such as your mobile phone, without interrupting the call. Click to flip the call and select the phone you want to use.

Click to park the call and the operator will announce the code to use to pick up the call. This is the code you’ll tell others about. If no one picks up the call, the call comes back to you.*

*Users listed in Park Location groups might see the option to park a call in a private or public location.
Call Management

Call Management features display of a Current Call and a Call on Hold.

From the screens, these quick actions are available:

- Resume or answer a call
- Join a held call to a current call
- Add a call to a conference
- Transfer a call to another extension
- Record a call
- Mute a call
- Activate your speaker
- Place a call on hold
- Park a call in the cloud
- Flip a call to a forwarding number in your extension
- End a call
Answer a Call.

When a call comes in, your desktop screen automatically changes to the Incoming Call screen so you know someone is calling you even when you don’t have the sound turned up on your computer. The Incoming Call screen shows the phone number (or internal extension) of the person calling, as well as the name and photo of the person, when it’s available.

A user has the option of answering the call; forwarding the call to another extension; screening the call; replying with a text message; sending it directly to voicemail; or ignoring the call and letting it be handled according to the call handling rules set up by the extension owner.

From here, you can decide how you want to answer the call.

Pick up the Call.

From the Incoming Call screen, click Answer to pick up the call. The volume on your computer is automatically switched on. If you like, you might want to have your headset handy so you can use it for the call.

New Window for Each Incoming Call.

All incoming calls are presented in a separate window when they come in.
Respond with a Courtesy Message.

When you can’t take the incoming call right away, you can provide a courtesy response. The TELUS Business Connect for Desktop app has automatic text-to-voice options. You can select a prepared message or type your own custom message, and it will convert it to voice and relay the message to your caller.

To respond with a prepared message:
1. From the **Incoming Call** screen, click **Reply**.
2. A popup screen opens with three different messages, such as: *Will call you back in…*
3. Click the message you want to use, and if needed, complete the message by typing the time limit you want (ex: *5 minutes*).
4. Click **Send**. The TELUS Business Connect for Desktop app relays the message to your caller.

To respond with a custom message:
1. From the **Incoming Call** screen, click **Reply**.
2. A popup screen opens with message options. Click **Custom Message**.
3. Type the response you want to send.
4. Click **Send**. The TELUS Business Connect for Desktop app relays the message to your caller.

To respond to an urgent request:
- When an urgent request is received, and replied to with a custom message, the requestor may press 5 on their phone and enter an “urgent” call back number that is instantly received
Screen Voicemail

When you’re not sure if you want to pick up the call, you can screen the call. The TELUS Business Connect for Desktop app allows you to send the caller to Voicemail, but you can hear the message the caller is leaving you. At any time while the caller is leaving you the message, you can pick up the call, and talk to the person. Voicemail is automatically stopped and your call becomes live again.

To screen the call:
1. From the Incoming Call screen, click **To Voicemail > Screen Voicemail**.
2. You can hear the caller leaving you a message.
3. To answer the call in progress, click **Pick Up**.
4. To stop screening and let the call continue to Voicemail, click **Stop Listening**.

Send the Call to Voicemail.

When you can’t take a call right away, you can send it to voicemail so the caller can leave you a message. To do so, from the **Incoming Call** screen, click **To Voicemail**.

Forward the Call.

When a call comes in and you think someone else might want to take it, you can forward the call. Here’s how:
1. From the **Incoming Call** screen, click **Forward**. A popup screen opens with phone number options.
2. Click the phone number where you want the call forwarded. Or click **Custom** and type the phone number you want.
3. Click **Forward**. It transfers the call to the new phone number.
4. Click **Ignore** to stop ringing on your app and allow call forwarding rules to take effect.
Call Recordings

Call recordings can now be accessed from your Desktop call log. The small red dot indicates calls that have been recorded. The tiny arrows indicate whether the call is inbound or outbound. Selecting Recordings shows which calls can be played or deleted (images 2 and 3).
View or Listen to a Message.

The Messages screen lists all of your messages in one place so you can prioritize the ones you want to open first. You can see your voicemail, fax, and text messages on this screen. Your messages are automatically synced from your online account and mobile app, so this message list is always current.

By default, you’re shown all messages, but you can click on any tab at the top of the screen to narrow your view to only one type of message. The red numbers next to the tabs tell you how many new messages you have.

To View Your Messages.

At the top of the screen, click 📧. The Messages screen opens. All of your messages are listed on the screen.

Voicemail Preview

Office Enterprise customers can also enable Voicemail Preview from the Messages & Notifications settings. When enabled, your voicemail messages will be converted to text and displayed as shown on the left.

Voicemail Preview is limited to the first 60 seconds of the message; short messages of 5–6 seconds will not be converted. Accuracy is not 100% and is influenced by the speaker's accent and connection factors.

Voicemail Preview will continue until turned off.

To Listen to a Voicemail Message.

Voicemail messages are shown with this icon: 🎧

- Click the message you want to hear
- Then click ⏯ on the audio bar to start the message

When you’ve finished listening to the message, you can:
To Read a Text Message.

Text messages are shown with this icon: 📩. The entire message is shown on the screen so you can read it immediately.

- Click the message to respond with a text of your own. The screen switches and now you can see the entire recent conversation thread.
- Type your message and click Send. This is a shortcut to the texting screen.

Group text messages are shown with this icon: 📩.

To View a Fax.

Fax messages are shown with this 📄. Click the fax you want to see then click 📄 to open the fax. The fax opens in a separate window on your computer.

When you've finished reading the fax, you can:

- View faxes and print locally by converting to PDF first.
- Send the person a text message.
- Delete the fax; it's permanently removed from your account.
- Flag the fax so you know you've read it already. Click again to mark it as unread.
- More information.
- Forward fax.
- Download fax PDF to save locally.
Send or Receive a Text Message.

You can send a text message to anyone you want, even if the person isn’t in your company network, so you can communicate easily with clients, friends, and family. You can send a text to one person at a time, multiple people listed together, or an existing group (of people) already set up in your Contacts list. When you’re texting multiple people or a group from your company directory, you can see the entire conversation thread from everyone participating in the thread.

To send and receive a text message:

1. At the bottom left of the screen, click 📩. The New Message screen opens.
2. In the To field, either click 📞 to search for contacts, or type the phone numbers you want.
3. Select Caller ID.
4. In the Type a message field, type what you want to say to the person.
5. Click Send. Your message is sent.
6. Keep the screen open and you’ll see any responding text messages. You can send another text and keep the conversation going for as long as you want.
7. If you miss a responding text, the Message screen will keep count of unread texts and save them there so you can read them at your convenience.
Hold an Audio Conference Call.

You can hold an audio conference call at any time directly from the desktop app. Conference calls can be held immediately, with no need to schedule one ahead of time. Every TELUS Business Connect user is assigned a unique conference line so you can have a conference call whenever you need one without worrying about network congestion.

Conference calls are a great way to get multiple people on the same call so you can discuss a topic. This is an audio-only connection. If you want to have a video meeting, use TELUS Business Connect Online Meetings instead.

Your **Host Access** number is the phone number you dial to start the Conference Call. The **Participant Access** number is the phone number your guests will dial to join your Conference Call.

The host of a multi-way conference call can disconnect any party in the call.

To hold an audio conference call:

1. At the bottom of the screen, click 📞. The **Conferencing** screen opens, listing your Host Access and Participant Access numbers.
2. If you have international participants, turn on **Include additional dial-in numbers**. This option lets you include local numbers in other countries so your participants won’t be charged international fees. Once you turn on this option, you can select the countries you would like to include in the invitation.
3. Decide if you want to invite people by text message or by email. Then click either **Invite with Text** or **Invite with Email**. The screen will switch to the email form or a text message.
4. In the **To** field, find the contacts you want, or type their phone numbers. Notice that an invitation message, complete with dial-in numbers, is automatically created for you. You can tack on a personal message if you like.
5. Click **Send**, and your invitations are sent to your participants.
6. Now, click **Join as Host** to start the conference call. The **Active Call** screen opens so you can manage your conference call as needed. The **Mute**, **Record**, and **Add+** (persons) options are especially useful during a call.
7. When you’re finished with your conference call, click **End Call** to stop the conference call for everyone and hang up.
Launch an Online Meeting.

You can hold an online video meeting at any time using TELUS Business Connect Online Meetings and start it directly from the TELUS Business Connect for Desktop app. Online meetings can be held immediately, with no need to schedule one ahead of time, unless you want to. Every TELUS Business Connect user is assigned a unique Online Meetings ID and password, so you can hold as many online meetings as you want.

Online meetings are a great way to reach multiple remote people to discuss a topic as if you’re all in the same room. You have access to video views from web cameras so you can see people face-to-face, and screen shares, so you can easily share presentations or other documents on your computer with everyone in the online meeting.

To join or schedule TELUS Business Connect Online Meetings:

1. At the bottom of the screen, click TELUS Business Connect Meetings opens in a separate window on your computer.
2. Click Join a Meeting if you have been invited to a meeting, or click Sign In if you want to set up an online meeting.
3. On the Sign In screen, select your country and enter your credentials.
4. Click Schedule Meeting if you want to set up an online meeting.
5. Or click Join a meeting if you’re connecting to a meeting set up by someone else.

For more information on how to use all the TELUS Business Connect Meetings features to make your online meeting more productive, see the Business Connect Meetings User Guide.
Send or Receive a Fax.

You can send and receive online faxes directly in the desktop app so you’ll never have to walk to your separate fax machine again. Your phone number is also your fax number, so you only have to remember one number. You can fax to one or more people at the same time.

To send a fax:

1. At the bottom of the screen, . The **Send Fax** screen opens.
2. In the **To** field, either click + to search all the contacts you want to fax, or type all the fax numbers.
3. Decide if you want to include a cover page. The default is **Blank**. Click the arrow icon next to **Blank** to see your cover page options.
4. Or click the blue plus icon + to see instructions on how to create your own custom cover page and add it to the list.
5. Click ✓ at the top right of the screen to save your selection.
6. Back on the **Send Fax** screen, in the **Note** field, add a comment or message, if you want.
7. Attach any files you want to send. Click ![folder] to browse and upload your attachment. Or drag-and-drop files from your desktop onto the dotted field (up to 20 MB).
8. You can also click ![scanner] to scan and attach a document from the scanner you have selected in **Settings > Messaging** as long as the scanner is installed, powered on, and connected to your computer.*
9. Click **Send now** to send your fax now, or click **Send later** and set the date and time when the fax will be sent.

*Scan to fax function is available for Windows only.
View Your Call Activity Records.

You can easily review your call activity directly from the desktop app. All call transactions (outgoing and incoming/missed calls) to your phone number are listed so you can check them when you want.

To view your call activity records:

1. At the top of the screen, click . The Call Log screen opens, showing all of your incoming and outgoing calls.
2. Here's how you can read the log:
   - Means a missed call
   - Means an outgoing call you made

Did you know?

Double-click on any call listed in the log to call the person again. Or click to see more options, such as adding the person to your Contacts list.
Personalize the TELUS Business Connect for Desktop App.

The TELUS Business Connect for Desktop app is ready to use as soon as you install it on your computer and log in. But it’s nice to personalize the app.

Here’s how you can personalize the TELUS Business Connect for Desktop app:

1. At the bottom of most app screens, click 🗝. The Settings screen opens in a separate window.
2. In the left menu, select your preference for any of the following:

<table>
<thead>
<tr>
<th>Click</th>
<th>To do this...</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Set as a default faxing and calling application</strong></td>
<td>Clicking the Apply button will change the status to “Currently set as default faxing and calling application”</td>
</tr>
<tr>
<td>Return to previous setting by:</td>
<td></td>
</tr>
<tr>
<td><strong>Automatically launch this application on startup, ON or OFF</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Run application minimized, ON or OFF</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Keep app in foreground, ON or OFF</strong></td>
<td>Set this switch to ON to keep your Desktop app on top of all other applications.</td>
</tr>
<tr>
<td><strong>TELUS Business Connect products alerts</strong></td>
<td>Informs customers of new features and service offerings.</td>
</tr>
<tr>
<td><strong>Access my account online:</strong></td>
<td>Clicking My extension settings will open your TELUS Business Connect application, where you may review or change your settings. Clicking Phone system will open your TELUS Business Connect application, where you may review or change your settings.</td>
</tr>
</tbody>
</table>

Settings screens are from the Windows app; Mac screens are similar.

---

**Note:** The Desktop app follows the user’s device language when available. Users can set their language of choice in the Language dropdown menu on the Settings — General page.
Sound Menu

Use the Sound menu to manage your Microphone, Speaker, and Ringer style and volume. If installed, the Plantronics Headset can be switched ON or OFF from the Sound menu.

<table>
<thead>
<tr>
<th>Click</th>
<th>To do this...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sound</td>
<td>Microphone</td>
</tr>
<tr>
<td></td>
<td>Automatically adjust microphone settings</td>
</tr>
<tr>
<td></td>
<td>Speaker</td>
</tr>
<tr>
<td></td>
<td>Ringer</td>
</tr>
<tr>
<td></td>
<td>Volume</td>
</tr>
<tr>
<td></td>
<td>Plantronics Headset</td>
</tr>
<tr>
<td></td>
<td>Ringtone</td>
</tr>
</tbody>
</table>
The Calls menu allows quick access to many desktop settings.

<table>
<thead>
<tr>
<th>Click</th>
<th>To do this...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calls</td>
<td></td>
</tr>
<tr>
<td><strong>Incoming</strong></td>
<td>Display incoming call in the standalone window. Launch an external app or URL on incoming call.</td>
</tr>
<tr>
<td><strong>HUD</strong></td>
<td>Monitor your contacts, view presence status, and call or text them.</td>
</tr>
<tr>
<td><strong>Ring when any user I am monitoring receives an incoming call.</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Auto answer/After</strong></td>
<td>Switch ON to select the number of seconds to wait before an incoming call forwards to voicemail or another extension. This can range from 5 to 30 seconds.</td>
</tr>
<tr>
<td><strong>Blocked numbers</strong></td>
<td>Click the + sign to open a field into which you can list phone numbers that you want to block from reaching your extension.</td>
</tr>
<tr>
<td><strong>Call quality</strong></td>
<td>Use high bandwidth whenever possible.</td>
</tr>
</tbody>
</table>

*Mac users have the option to automatically pause iTunes when a call comes in.*
Calls Menu—Outcoming.

The Calls menu allows quick access to many desktop settings.

![Calls Menu](image)

<table>
<thead>
<tr>
<th><strong>Click</strong></th>
<th><strong>To do this...</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Calls</td>
<td></td>
</tr>
<tr>
<td>Outgoing</td>
<td></td>
</tr>
<tr>
<td><strong>Calling mode/Direct Dial</strong></td>
<td>The Direct Dial option is visible only when a digital line is assigned to the computer where the desktop app is installed.</td>
</tr>
<tr>
<td><strong>Calling mode/RingOut</strong></td>
<td>Ring me on a specified device first, then connect the called party.</td>
</tr>
<tr>
<td><strong>Prompt me to dial 1 before connecting the call</strong></td>
<td>Switch OFF to have the call come directly to your extension without delay.</td>
</tr>
<tr>
<td><strong>Local dialing</strong></td>
<td>Dial local calls without dialing country and area code first.</td>
</tr>
<tr>
<td><strong>Country</strong></td>
<td>Select your country from the drop-down.</td>
</tr>
<tr>
<td><strong>Area code</strong></td>
<td>Enter the area code from which your calls will originate.</td>
</tr>
<tr>
<td><strong>Outbound caller ID</strong></td>
<td>Select the number you want to display when you make outgoing calls or texts.</td>
</tr>
<tr>
<td><strong>Calls</strong></td>
<td>From the drop-down, select a number from which your calls will originate. All numbers on the Service Web are available.</td>
</tr>
<tr>
<td><strong>Texts</strong></td>
<td>From the drop-down, select the number from which your texts will originate.</td>
</tr>
<tr>
<td><strong>Call quality</strong></td>
<td>Use high bandwidth whenever possible.</td>
</tr>
</tbody>
</table>
Messaging Menu

Use the Messaging menu to manage incoming calls to the desktop.

Click | To do this...
--- | ---
Messaging | Play notification sound for fax and text messages
  | Decide whether you want to hear a sound when you send or receive a text or fax.
  | Convert direct numbers to extensions when I try to send a message to several recipients
  | Extensions are sometimes easier to recognize between colleagues. Decide when you’d like to do a conversion like this.
  | Default action: Ask me; or Do not convert; or Convert.
  | Automatically print incoming faxes
  | When Automatically print incoming faxes is ON, a list of printers will appear for selection (Windows only).
  | Scanners
  | Select a scanner from the drop-down list—configure it in Settings.
  | This scanner will be used to add a scanned page to an outgoing fax.
  | - Supports DPI downscaling and inverting images
  | - Automatically converts color to black and white
  | - Windows only
  | Invert image
  | Default setting is OFF.
Contacts Menu—Integrate with Microsoft Outlook.

The TELUS Business Connect for Desktop app seamlessly integrates with Microsoft Outlook so you can conveniently call, fax, or text all of your contacts while you’re in Outlook. *Available for Microsoft Windows users only.*

Click To do this...

<table>
<thead>
<tr>
<th>Click</th>
<th>To do this...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contacts</td>
<td>To set up your Outlook* account to work with Business Connect for Desktop:</td>
</tr>
<tr>
<td>1.</td>
<td>At the bottom of the app screen, click . The Settings screen opens in a separate window.</td>
</tr>
<tr>
<td>2.</td>
<td>From the left menu, click Contacts.</td>
</tr>
<tr>
<td>4.</td>
<td>Select Contacts (Mobile).</td>
</tr>
<tr>
<td>5.</td>
<td>Outlook Contacts will be added to your Contacts list, provided you have previously selected the profile and available folders of the contact lists you want to import.</td>
</tr>
<tr>
<td>6.</td>
<td>Then set your contact import and profile preferences.</td>
</tr>
</tbody>
</table>

*Microsoft Outlook 2010 or later is required.*
Contacts Menu—Integrate with Mac Address Book.

The TELUS Business Connect for Desktop app seamlessly integrates with Mac Address Book so you can conveniently call, fax, or text all of your contacts while you’re in your Mac Address Book. Available for Mac users only.

<table>
<thead>
<tr>
<th>Click</th>
<th>To do this...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contacts</td>
<td>To set up your Mac Address Book to sync with The TELUS Business Connect for Desktop app:</td>
</tr>
<tr>
<td></td>
<td>1. At the bottom of the app screen, click . The <strong>Settings</strong> screen opens in a separate window.</td>
</tr>
<tr>
<td></td>
<td>2. From the left menu, click <strong>Contacts</strong>.</td>
</tr>
<tr>
<td></td>
<td>3. Set the <strong>View contacts from “Contacts”</strong> option to <strong>ON</strong>. If this is your first time syncing your Mac Address Book with The TELUS Business Connect for Desktop app, you will be asked to allow the desktop app to access your Mac Address Book.</td>
</tr>
</tbody>
</table>
Join Now

Join Now integrates with Google, Outlook (Win), and iCal (Mac) calendars, so you can identify and join meetings and conferences, and make calls from calendar events.

Switching **ON** Join Now opens your Google Account.

<table>
<thead>
<tr>
<th>Click</th>
<th>To do this...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Join Now</td>
<td>- Identify meetings and conferences, and make calls from calendar events</td>
</tr>
<tr>
<td></td>
<td>- One tap to join conference calls—access code entered automatically</td>
</tr>
<tr>
<td></td>
<td>- Shortcut buttons to join meetings</td>
</tr>
<tr>
<td></td>
<td>- Configure calendar source and notifications</td>
</tr>
</tbody>
</table>

![Settings menu with Join Now option highlighted]
Hotkeys

Available for Microsoft Windows and Mac users.

<table>
<thead>
<tr>
<th>Click</th>
<th>To do this...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotkeys*</td>
<td></td>
</tr>
<tr>
<td>Pick up the call</td>
<td>None; Ctrl + Enter; Enter</td>
</tr>
<tr>
<td>End call</td>
<td>Ctrl + E</td>
</tr>
<tr>
<td>Mute/unmute</td>
<td>Shift + Ctrl + M</td>
</tr>
<tr>
<td>Hold/unhold</td>
<td>Shift + Ctrl + H</td>
</tr>
<tr>
<td>Sending new text</td>
<td>Ctrl + N</td>
</tr>
<tr>
<td>Sending new fax</td>
<td>Ctrl + J</td>
</tr>
<tr>
<td>Advanced Hotkeys</td>
<td></td>
</tr>
<tr>
<td>Transfer</td>
<td>Ctrl + T</td>
</tr>
<tr>
<td>Park</td>
<td>Shift + Ctrl + P</td>
</tr>
<tr>
<td>Outgoing Call</td>
<td>F6</td>
</tr>
<tr>
<td>Outgoing Fax</td>
<td>Ctrl + J</td>
</tr>
<tr>
<td>Send text message using Enter</td>
<td>Ctrl + Enter</td>
</tr>
<tr>
<td>Dialpad</td>
<td>Ctrl + D</td>
</tr>
</tbody>
</table>

Access my account online:

- Extension settings
- Phone system
- Billing (requires login to your online account)

*Hotkeys on your TELUS Business Connect for Desktop app are always available even if the app is minimized, as long it is running. This allows you to perform specific actions with just a touch of a key on your Windows PC. You can set Hotkeys to pick up a call or to send a text message.
Mac Hotkeys

Available for Mac users.

**Hotkeys**

- **Pick up the call**: None; Ctrl + Enter; Enter
- **End call**: Ctrl + E
- **Mute/unmute**: Shift + Ctrl + M
- **Hold/unhold**: Shift + Ctrl + H
- **Sending new text**: Ctrl + N
- **Sending new fax**: Ctrl + J

**Advanced Hotkeys**

- **Transfer**: Ctrl + T
- **Park**: Shift + Ctrl + P
- **Outgoing Call**: F6
- **Outgoing Fax**: F8
- **Send text message using Enter**: Ctrl + Enter
- **Dialpad**: Ctrl + D

**Access my account online:**

- **Extension settings**
- **Phone system**
- **Billing (requires login to your online account)**
Support — Technical

For issues or questions about TELUS Business Connect or other TELUS products, visit the Customer Support page.

Application logs
When you allow TELUS Business Connect to collect data, TELUS will use your feedback to debug issues.

Send crash reports automatically

Purge data

Support — Send Product Feedback.

Let us know what you think.
We welcome your ideas, questions and comments.

What is your feedback about?

Email (optional):

Comments:
Enter your comments here

Send
About

This message will appear at the bottom of your About screen when you click Check for Updates if your installed version of the desktop app is up-to-date.

Click | To do this...
---|---
About |

**About Business Connect for Windows**
Business Connect for Windows is a complete communication hub that lets you talk, text, fax and conference from one convenient app on your computer desktop.

**Take a Tour**
Learn about the latest features in this easy-to-use, friendly desktop app.

**Check for Updates**
The current version of the desktop app installed on your computer is shown here. Click Check for Updates to determine whether you have the latest version installed. Use this button to download updates to the desktop app.

**Release Notes:**
This section lists the new features in this release. Among these are:

- Promote a 3-way active call to a conference call
- Selective ringing on HUD: configure extensions allowed to ring your phone
- Improved user experience of the “Call Flip” feature
- Call queue and IVR numbers are now available in the caller ID dropdown

- Added support for Spanish and Italian
Head Up Display.

Head Up Display (HUD) is a call management feature that allows you to monitor and interact with up to 100 user extensions that you can add to a HUD list, which is displayed alphabetically.

With HUD you can view the presence status of each extension on the list in real time. You can also transfer active calls to any extension in your system, and add users to active calls. If you have permission, you can pick up incoming calls on behalf of other extensions.

To enable HUD, follow these steps:

1. Click the HUD icon at the top of most app pages.
2. Welcome to the HUD will appear if you have not set up your Presence appearance in your online account; otherwise your HUD list will sync automatically to the extensions in your Presence appearance.
To add extensions to the HUD, follow these steps:

1. Click the green **Create** button (previous page). The **Select a Contact** screen opens.
2. On the **Select a Contact** screen, place a checkmark next to users you want to add to your HUD list, and click **Add**.
3. Click **Save**. Your new HUD list will appear as shown at right on the next page.

Click the **Edit** icon ; then the **Add** icon on the HUD list to add more contacts.

**Note:** If the Presence appearance is defined in the user’s Office account, the HUD list will be set up automatically and synchronized to the user’s Contacts list (User > Phones & Numbers > Presence > Appearance).
There are many ways you can manage calls with HUD:

1. On the new HUD list, mouse over a name to place a call or send a text message to the extension.
2. Click the **Undock** icon to see the complete HUD list in a separate screen for easy call handling. The HUD list can contain up to 100 extensions.
3. During an active call, mouse over the extension (i.e., Ben Smith, Ext: 106) to see additional options you can perform with HUD. These are **Call**, **Text**, **Transfer**, and **Conference**.

4. You can transfer your active call to another extension by **Warm Transfer**, **Blind Transfer**, or **To Voicemail**.

5. With HUD you can also instantly add (conference in) users to your active calls.
6. To pick up an incoming call to an extension you have permission to monitor, mouse over the extension to reveal the Pickup option. Click the Pickup icon to handle the call.

7. On the pop-up that follows, the person monitoring an extension can **Forward** the call; **Reply** to the call with text; **Ignore** the call; or **Pickup** the call and answer it on behalf of the extension owner.

Ignoring the call will cause it to be handled by the call forwarding rules set up by the extension owner, such as going to voicemail, being forwarded to another phone, or forwarded to a colleague.
HUD Call Monitoring.

Incoming calls to an extension within the HUD list can be monitored if the extension owner has granted permission to the person who wishes to monitor that extension.

For example, when an agent is on a call, a supervisor in the same monitoring group can mouse over the extension to start monitoring the call.

The supervisor can listen in and **Whisper** only to the agent; **Barge** in and be heard by both Agent and Caller, or **Takeover** the call.

Agent Charlie Lee takes a call from a client. Charlie’s supervisor scrolls over Charlie’s extension and clicks **Monitor** to listen in.

Charlie’s supervisor has the option to **Whisper** to Charlie, **Barge** in, or **Takeover** the call.
Active Call Layout.

This screen for conference calls provides:

- Improved layout for all local calls in conference
- An updated design that displays all parties in conference
- Improved user interface and structure
Park Locations is a feature on the desktop app HUD that allows you to park a call privately that can only be answered by users within the group. This provides increased security as only selected employees can pick up the parked call.

Users within the designated group can pick up a parked call anywhere within the TELUS Business Connect for Desktop app, even when away from their desk.

During an active call, click the Park Location group on the HUD; then mouse over the location to park the active call. Answer parked calls by mousing over the Park Location extension and clicking Pickup.
Check for Updates.

- Click the View Settings icon near the bottom left of the Settings screen.
- Next to Current Version: Click Check for Updates to determine whether you have the latest version of the TELUS Business Connect for Desktop app installed.
Give Us Feedback.

We love hearing from you! Your comments help us improve the TELUS Business Connect for Desktop app, so don’t be shy about telling us what’s on your mind. We want to hear the good and the bad.

Here’s how you can get in touch with us:

1. At the bottom of the screen, click . The Settings screen opens in a separate window.
2. From the left menu, click Support > Send Product Feedback.
3. In the What is your feedback about field, select the topic of your correspondence.
4. In the Email field, type your email address if you’d like us to respond to you.
5. In the Comments field, type your feedback. Go all out. Let us know what’s on your mind. We are happy to hear whatever you have to say.
6. When you’re done having your say, click Send. Your feedback is sent around to the TELUS Business Connect team. While you might not get a response right away, rest assured that we hear you. We review every bit of feedback that comes our way. If you included your email address, we might contact you for more details.
7. Please send feedback as often as you like!

When you’re done with work for the day, you can log out of the TELUS Business Connect for Desktop app. Here’s how:

1. At the top of the screen, click Settings. The Settings screen opens in a separate window.
2. From the left menu, click Log out.
3. A confirmation message displays. Click Log out again.

You’ve now successfully logged out and closed your TELUS Business Connect for Desktop working session. See you tomorrow!