



The following guide gives a description of the most commonly used features of Accession Desktop. Please refer to the installation instructions for information on downloading and launching the client.

A main component of the Accession is making and taking phone calls from the application. To do this, you may use a headset compatible with your PC (optimal) or, if available, inbuilt microphone and speakers.

Accession lets you make calls from anywhere using the most convenient device. Therefore, if you place a 911 call from Accession Communicator, the 911 operator may not be able to identify where you are calling from, thus this is not suggested for emergency use.

Getting Acquainted with Accession Interface and In-Call Screen

Access other features and log out via the top File, Tools, and Help menus.

Use the call manager button to manage your presence, availability, and call manager settings.

Recent calls list may be used to dial back a call or review former calls.

Red= Missed
Green= Outgoing
Blue= Incoming

Dialpad is available to dial ad-hoc numbers. Directories may also be used to initiate calls.

Access voicemail and faxes in your account by using the Messages button.

Quick Access tabs for Favorites, Contacts, and Recent call lists.

When selected, use to call the entry or to add the entry to your contacts list.

- In call screen function keys include:
1. Add Call
 2. Transfer
 3. Hold
 4. Mute
 5. Adjust Volume
 6. Dial
 7. Switch the call to another available device
 8. Record
 9. Park
 10. End Call

Line - 00:00:04

1 2

Line Inc

3 4 5 6 7 8 9 10

Accession Desktop Basics

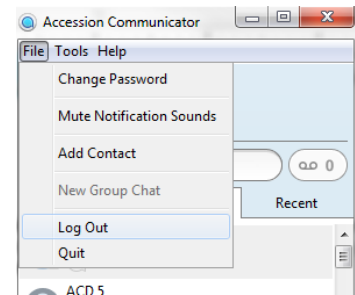
Logging In and Out

You must be logged into the Accession desktop application to use its features.



To launch the installed application, choose the application from the start menu or click on the associated desktop icon. While running, the Accession program may be minimized. Click on the icon in the taskbar or system tray to maximize the program.

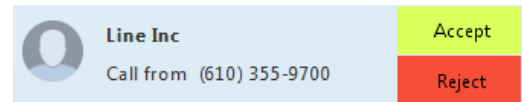
To log out of the program, click on File then Log Out as shown to the right.




Answer a Call

When Accession receives a call, a notification will show on the screen and a ringtone will play through the connected headset/speakers.

- To answer the call, click *Accept*. If you were already on one call and answer a second, the other call will go on hold automatically.
- To reject the call, click *Reject*. If voicemail is enabled on your line, the call will go to voicemail.



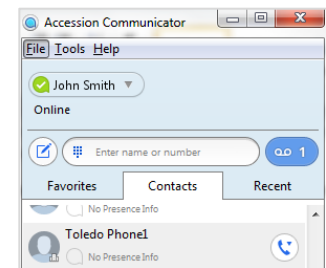
End a Call

To end a call, click the  End call button at the bottom of the call screen.

Make a Call

Call Using Accession Contacts:

- Click the Contacts tab.
- Scroll through the contacts or type in a search term to find the appropriate contact.
- Hover over the contact name then click on the Call Contact button.



Call Using Accession Dialpad:


- Type in the phone number in the dialer field or click on the dialer to launch to keypad.
- Press enter or click Call to initiate the call.




In Call Features

Add Call


You may add another call to an existing phone call. This allows all parties to speak with each other at the same time.

- Click the  Add Call button from the call screen
- Type in the phone number or extension you wish to transfer the call then click the **Add** button.
- The call will immediately be added to the current call (all parties will hear each other).


- To end the group call, click the  End call button at the bottom of the call screen.
- To remove one of the parties from the call, click on the X above their name in the call screen.





Transfer

- Click the  Transfer button from the call screen
- Type in the phone number or extension you wish to transfer the call.
- Click Transfer Call button to complete the transfer.


Hold

Click the  Hold button on the call screen to place a call on hold. Click again to resume the call.

Mute

Click the  Mute button on the call screen to mute your current call. Click  to resume audio.

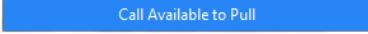
Record

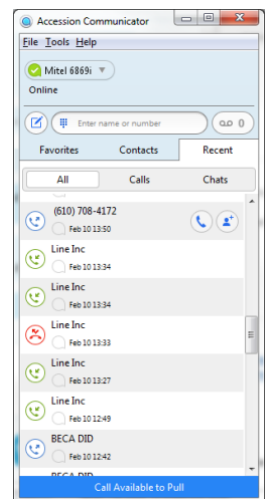
Click the  Record button on the call screen to record your current call. Recordings are saved to your local computer drive by default. Be sure to follow all state, federal, or industry guidelines for recording and file retention.

Pull

If you are on a call on another device (for example, your mobile soft phone), you may *pull* the call to the Desktop application in order to continue it there.


To Pull a live phone call to Desktop Accession:

- Click the  Call Available to Pull button in the Accession interface.
- In the screen that appears, click *Pull Call* to continue the call on the Desktop application.



Switch

If you have other devices logged in as this phone number, you may switch your currently active call to another device.


Click the  Switch button on the call screen to switch call to a different device. When the call is answered on another device, it will automatically end on the desktop.

Advanced Features

Call Park

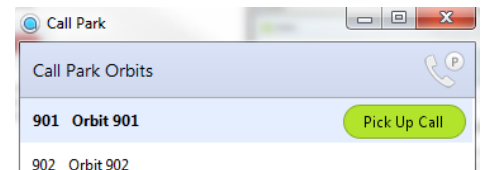
To use call park, you must first enable it. Navigate to *Tools- General- enable call park*. You will only need to do this once. After the call park is enabled, it may be used as follows:

To park a live call:


- Click on the  Call Park button in the call screen
- Click on an available park to transfer the call to the orbit.

To retrieve a parked call:

- Navigate to *Tools – Call Park*.
- Click on the parked call you wish to retrieve.



Voicemail

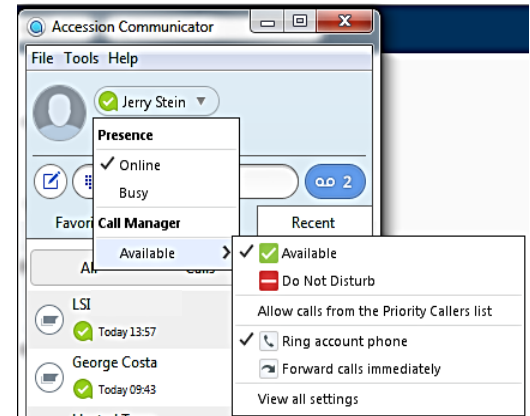
See any/all messages by clicking on the  messages icon. Any messages that are being sent to your CommPortal (phone) may be managed in the *Messages* screen that follows. If new messages are in your box, they are indicated as a number on the messages button.

Call Manager

The Call Manager section allows you to modify your availability for calls. Please note that the changes you make to the call manager will apply to all instances of your phone number (for example, you may have a desk phone, desktop softphone, and a mobile softphone application).

To modify the Call Manager settings:

- Click on the arrow by the name of your phone to show the drop down menu
- Hover over the call manager section then choose the menu option you would like to utilize.



Available or Do Not Disturb

- A checkmark by *Available* signals that you are ready to take calls to the phone number and extension assigned to your Accession Desktop login.
- A checkmark by *Do Not Disturb* sends all of your calls directly to your voicemail. You may still make outbound calls normally.

Allow Calls from the Priority Callers list

- If you've chosen to put your phone into *Do Not Disturb*, you may choose to keep getting calls from your designated Priority Callers by placing a checkmark here.
- Please note that you must create your desired list of priority callers by going to *View All Settings* and creating a list there.

Ring account phone or Forward calls immediately

- A checkmark by *Ring Account Phone* signals that you want all calls to ring the phone number assigned to your account.
- A checkmark by *Forward calls immediately* allows you send all calls to an alternate phone number or extension.








View all settings

- Use this option to modify the above call manager settings and more.

Presence

Accession users may monitor the presence of other Accession users in their business group.


Presence statuses on Accession Desktop include:

-  Available: user is available
-  In call: user is on at least one phone call
-  Do Not Disturb: user has enabled Do Not Disturb
-  Busy: user has changed presence status to *busy*
-  Outlook Busy: user outlook calendar reflects an event
-  Inactive: user has not been active recently (default is 15 minutes)
-  Off line: user is not logged into Accession or is not an Accession user





Chat

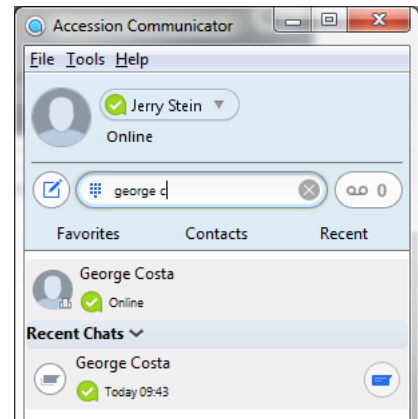
Accession users may initiate chat with one or more Accession users in their business group.

To initiate a chat session:

- Search for the contact in the Favorites, Contacts, or Recent tab
- Hover the cursor over the contact
- Click the chat icon  to begin a chat

Buttons that line the top of chat window will allow the user to do the following:

-  Send a file
-  View recent chat history
-  Call the contact
-  Add an additional person to the chat session





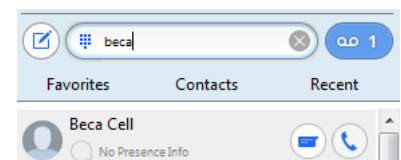
SMS

Accession users may send and receive SMS messages if the feature is enabled on the account. Usage charges may apply for SMS messages. Please contact your sales representative for details.



If your Accession client has SMS capabilities enabled, you can send an SMS message to other SMS-enabled telephone numbers. For example, you can send an SMS (text) message to one of your clients' cell phones.

To send an SMS message to an existing contact:

- Find the contact using search or one of the contact tabs.
- Click the  chat icon to open the SMS/Chat box.
- Ensure that  SMS option is selected in the chat text box then send the message normally.



To send an SMS message to an ad-hoc telephone number:

- Input the telephone number of the contact in the dial field.
- Click the  SMS icon to open the SMS/Chat box.
- Ensure that  SMS is selected in the chat text box then send the message normally.

