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UNIVERGE BLUE®
CONNECT

Desktop and Mobile Application Get Started Guide

UNIVERGE BLUE®
CONNECT

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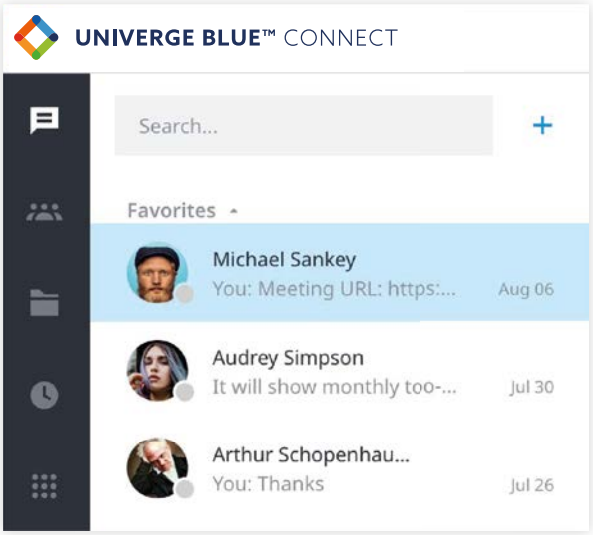
OVERVIEW

The UNIVERGE BLUE® CONNECT Desktop App brings essential collaboration tools together, making teamwork easier than ever. See who is available, send chats, place and receive calls, share screens, start video calls and share files – all from one application.



ICON GLOSSARY	MEANING
	Call
	Meet now
	Add member
	Voicemail
	Park
	Transfer
	Flip
	Dial
	Receptionist View*
	Chat

INSTALLATION

UNIVERGE BLUE® CONNECT Desktop App is available for both Windows® and Mac® platforms. You can download the app at **https://www.univerge.blue/apps/**

Once installed, log in using your email address and your CONNECT password.

*Only visible when Receptionist View is enabled.

CALLING FEATURES

Once logged into the application, you will be prompted to select a call mode.
You can use your application in two ways:

- Call Controller Mode: acts like a remote control for your associated desk phone
- Softphone Mode: place and receive calls from your PC or Mac® using the computer's external speaker and microphone; a headset is highly recommended for this mode

  Note: Emergency calls are not allowed and will be blocked by the application.

Calling features in the CONNECT Desktop App vary based on calling mode. Please see the table below for differences between Call Controller and Softphone modes.

FEATURE / APP MODE	PLACE A CALL	RECEIVE A CALL	3-WAY CALLING	MUTE/ UNMUTE	HOLD	DTMF	CALL FLIP	CALL PARK	TRANSFER	END CALL
Call Controller	●	Desk Phone	●	Desk Phone	Desk Phone	Desk Phone	●	●	●	●
Softphone	●	●	●	●	●	●	●	●	●	●

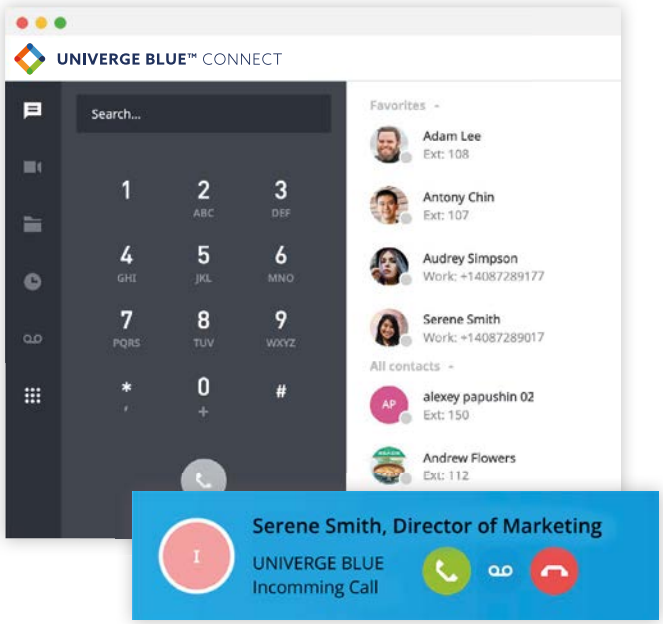
CALL CONTROLLER MODE

Placing a call

- You can place a call using the dial pad or by clicking on the 'Dial' button in a chat or a user's contact card
- Pick up the handset or press the 'Speaker' button on your physical phone

Receiving a call

- To answer an incoming call, pick up the handset or press the 'Speaker' button on your physical phone. You can reject a call or send an incoming call to voicemail using the desktop application



SOFTPHONE MODE

Placing a call

- You can place a call using the dial pad or by clicking on the 'Call' button in a chat or a user's contact section
- The call will be placed through the computer

Receiving a call

- To answer an incoming call, click the 'Pick-Up' button in the incoming call notification.

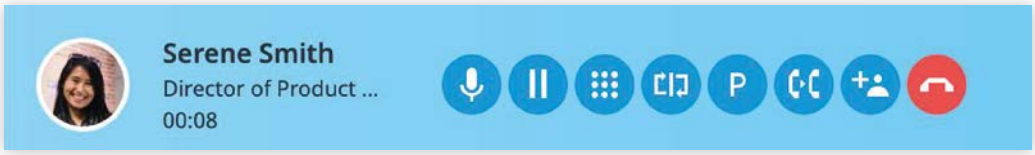
ACTIVE CALL FEATURES

UNIVERGE BLUE® CONNECT Desktop App provides multiple options for handling calls.

Transfer

You can choose between three options to transfer calls:

- Blind transfer allows you to transfer the call without having a conversation with the party you are transferring to:
  1. While on an active call press 'Transfer'
  2. Select the contact or use the dial pad to enter the phone number
  3. Click on the 'Blind' transfer icon



- Warm transfer allows you to first consult with the party to which you are transferring a call to before completing the transfer:
  1. While on an active call press 'Transfer'
  2. Select the contact or use the dial pad to enter the phone number
  3. Click on 'Warm' transfer icon
  4. Your first call will be placed on hold. Your second call will be established
- Transfer to voicemail allows you to send the call directly to voicemail
  1. While on an active call press 'Transfer'
  2. Select 'Transfer to Voicemail' icon

CALL PARKING

Call Park is a feature which allows CONNECT users to put a call on public call park and have a different user pick it up on another phone by dialling the park location.

- Press 'Park' icon next to the active call
- The system will tell you which extension the call is parked on
- Share the parked call extension with the co-worker who can help the caller
- To pick up the call, you or your co-worker should dial the extension the call is parked on

Note: After 60 seconds of a call being parked it will ring back on the original phone.

CALL FLIP

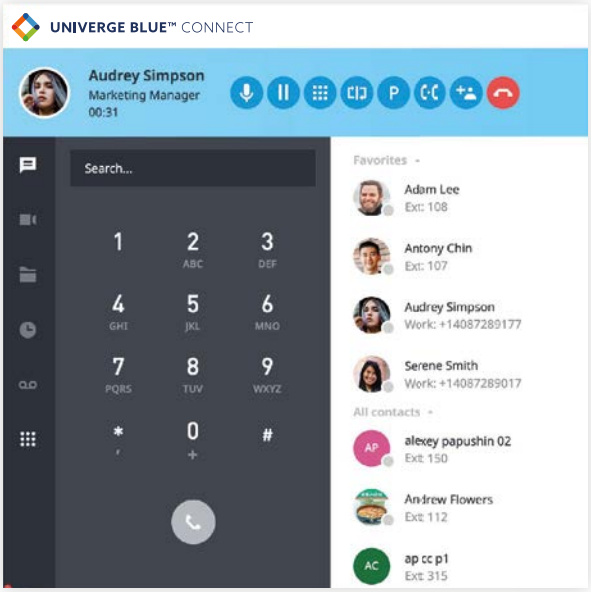
Call Flip allows you to continue your active call using a different device. For example, you can flip a call from your mobile to your desktop phone and vice versa.

1. While on an active call, press the 'Flip' button
2. Call will be placed on hold and all other assigned devices will start ringing
3. Pick up the call and continue conversation on the new device

3-WAY CALLING

Add a third person to any active call.

1. Start a regular call with one of your contacts or any external number
2. Click 'Add Call' on active bar
3. Select a contact to add to the call or enter a number to call
4. The first call will be put on hold.
   To start a 3-way call click 'Merge Calls'



CALL HISTORY

Call History tab shows a list of all your past calls, making it easy to return missed calls and see logs of previously made calls.

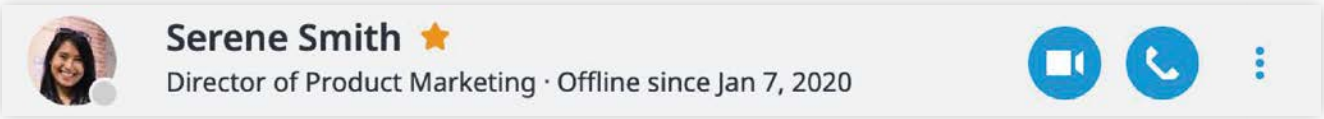
CONTACTS

Contacts Search

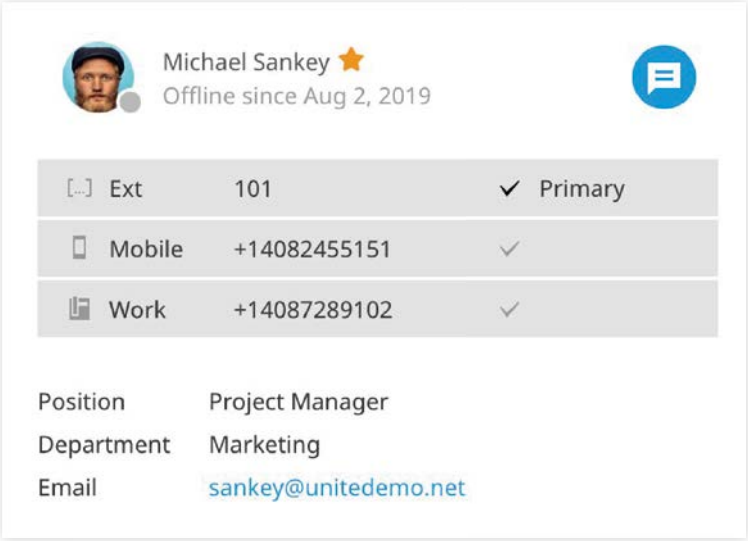
CONNECT Desktop allows you to search for and initiate calls and chats with your co-workers. Searches can be conducted by first name, last name, job title, position, department, or email address.

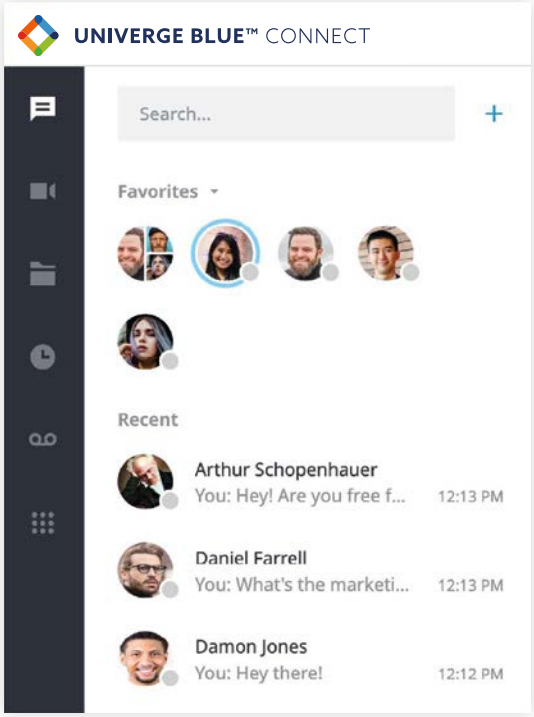
Once the search results appear, you have two choices:

1. You can click on the contact from the search results, which will open a chat window with them. From there, you can chat with them, place a call with the 'Call' button, start a meeting, or search your chat conversation.



2. Or, you can hover over their avatar, and choose to chat or pick a number to dial.





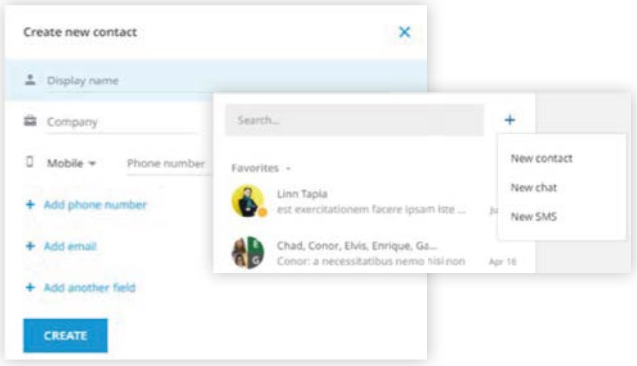
SETTING FAVOURITES & VIEWING RECENT CONTACTS

CONNECT Desktop allows you to pin your 'Favourite' contacts to the top of your client for easy access. Below your favorites, you will see a list of your most 'Recent' chats.

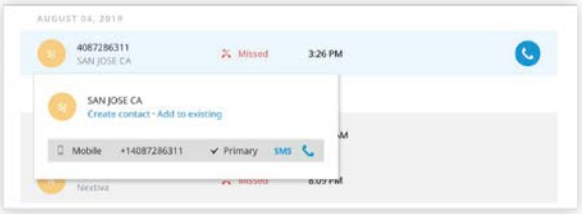
Contact Management

There are a few ways to create a new contact:

1. Click on '+' and select 'New Contact'



2. Create new contact based on a placed or received call

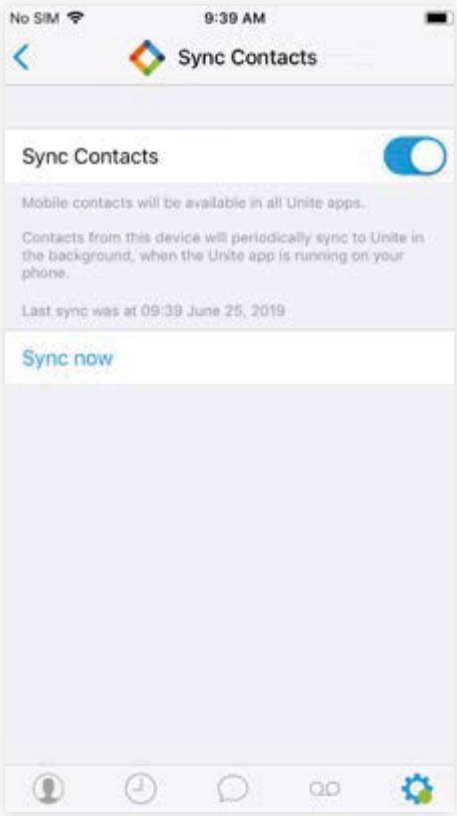


Contact Sync

From your mobile device (Android®, IOS®) sync your contacts from popular third-party platforms (Office365®, G Suite® and more) to all your CONNECT Apps.

To enable Contact Sync:

- Open your CONNECT Mobile App > My Account/Settings > General > Enable 'Sync Contacts' to CONNECT
- Your contacts will automatically sync across your CONNECT Desktop and Mobile Apps



TEAM CHAT

CONNECT Desktop enables you to instant message any of your co-workers in your contact database.

Sending a chat

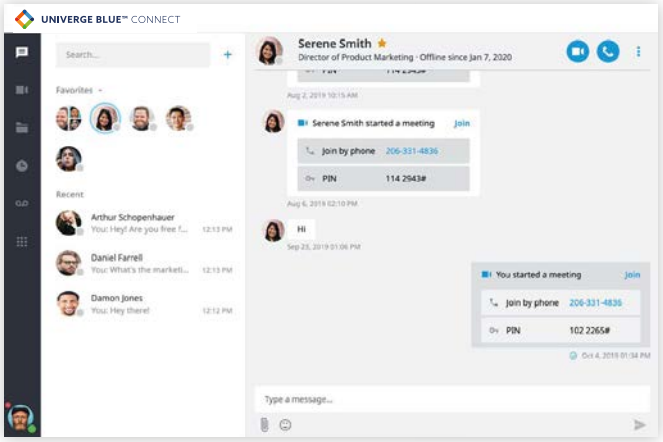
- You can initiate a chat by searching for a contact or clicking on a 'New Chat' button and selecting the user you want to chat with

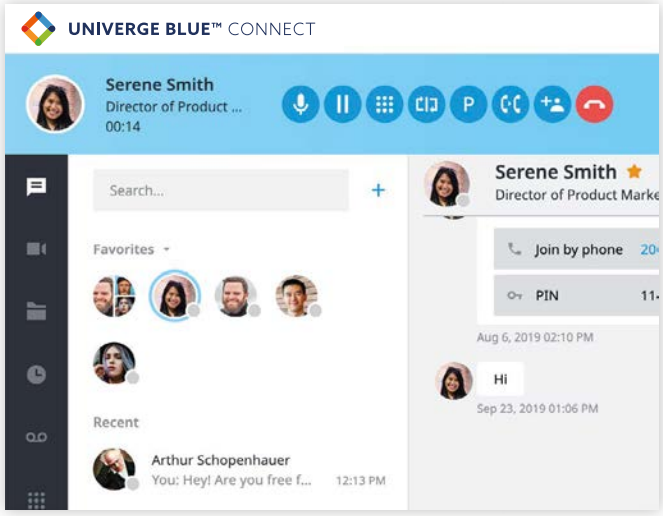
Receiving a chat

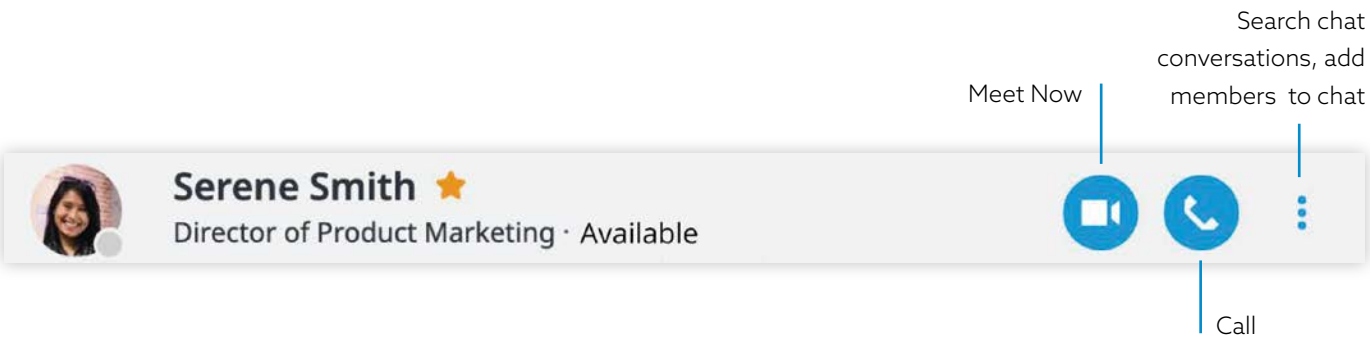
- If someone sends you a chat while you are online, the app will visually notify you of the new message and the message will show up in your 'Recent' list
- If someone sends you a chat while you are offline, you will receive an email. Once you come back online, your desktop app will highlight the unread chat messages

In-chat collaboration options

- 'Call' button will call the chat contact on their extension
- 'Meet Now' button will start a meeting (screenshare, video call, conference call) with a chat contact

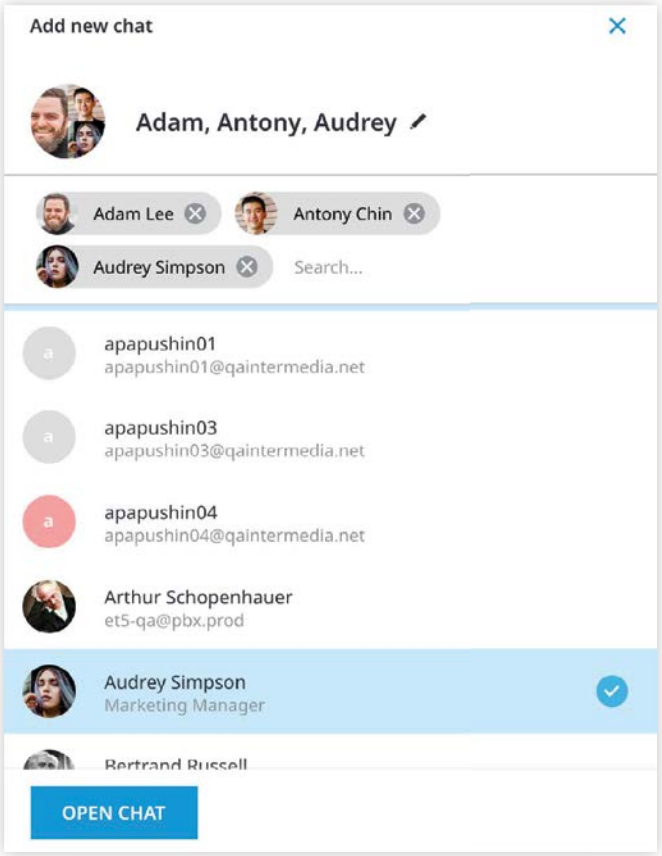






TEAM CHAT

CONNECT Desktop allows you to create team chats, so that multiple users can participate in a chat at the same time.



Creating a team chat

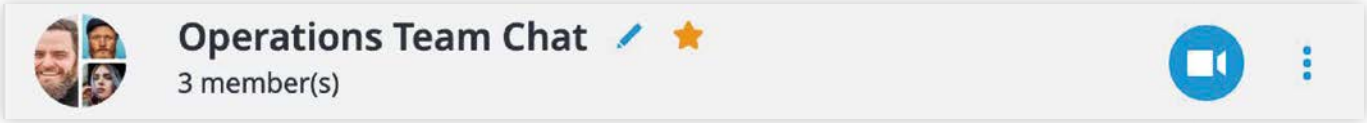
1. You can add one or more members to an existing 1-on-1 chat
2. You can create a group chat using the 'New Chat' workflow

In-chat collaboration options

- 'Meet Now' button will start a meeting (screenshare, video call, conference call) with team chat members

Chat history

- Chat history is retained indefinitely
- Chat history is also synced across all of your desktop and mobile devices, so that you can always refer to past conversations and have the desired context as you chat with co-workers
- Search conversation history in CONNECT (1:1 chat, group chats) to find relevant messages



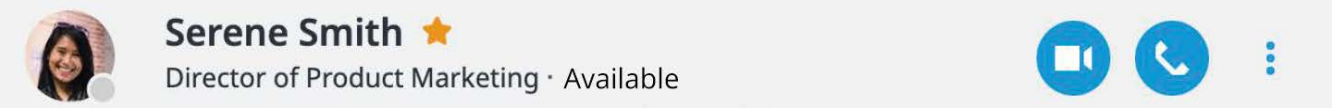
MEETINGS

CONNECT Desktop enables you to easily start and participate in online meetings. Meetings will allow you and your co-workers to join an audio/video conference, screen share, record, etc.

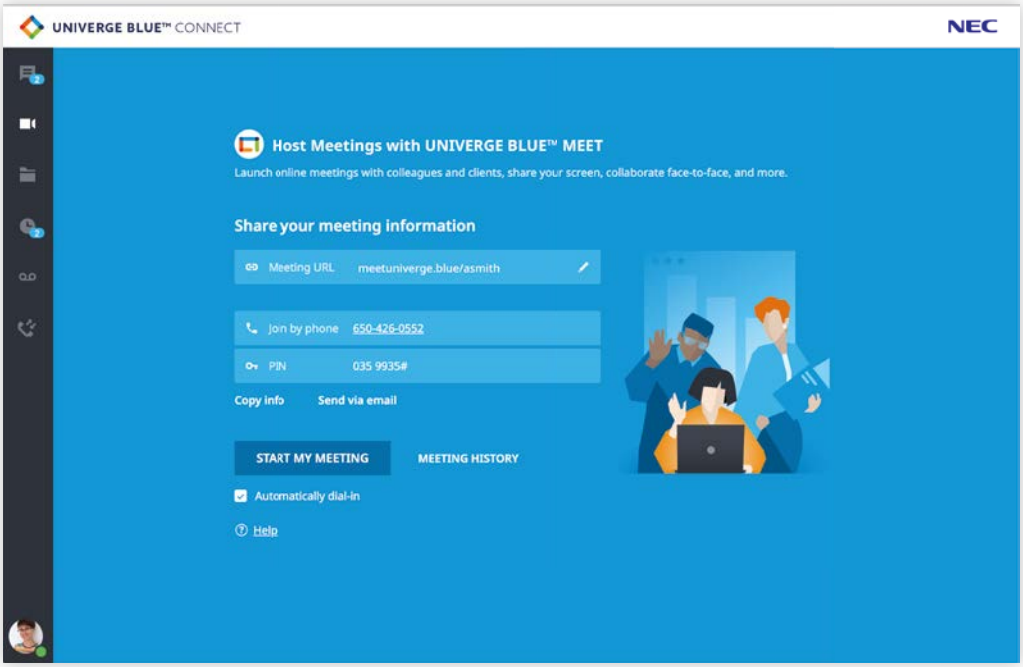
Start a meeting

Users can start a meeting in 2 different ways:

1. Screensharing and conferencing with chat participants
   a. You can start a meeting with one-on-one or team chat participants by clicking the 'Meet Now' button



2. Meetings Tab
   a. You can easily start your previously scheduled meeting from the Meetings tab
   I. Meeting details (Personal Meeting URL, Conf bridge info, etc.) are typically shared via a calendar invite
   II. Clicking on 'START MY MEETING' will launch your meeting



INTEGRATIONS

CONNECT CRM Screen Pops

Connect your UNIVERGE BLUE® CONNECT desktop app to third-party platforms (Salesforce, Zendesk, etc.) and custom CRMs to quickly view caller's profile on inbound and outbound calls and in call history.

CONNECT for G Suite®

Click to call phone numbers on any web page, start meetings from your Chrome™ browser, and more.

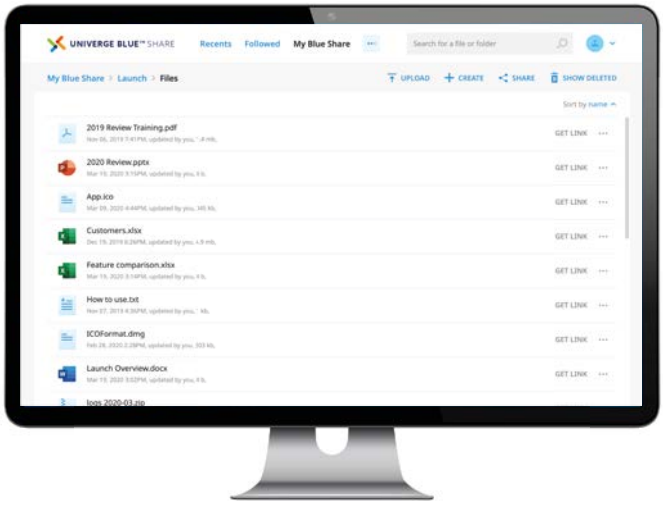
CONNECT for Microsoft Outlook®

Place calls, view presence, click-to-chat, and start meetings all from your Outlook contact list, emails, and calendar events.

FILES

UNIVERGE BLUE® SHARE is integrated with UNIVERGE BLUE® CONNECT. SHARE enables you to securely access, manage and share your files directly from the CONNECT desktop application – while also protecting your files from viruses and data loss.

For the complete SHARE experience, read the SHARE Quickstart Guide.



Licensing

Each CONNECT PRO and PRO PLUS user account includes a SHARE part of 10GB/user. Contact your admin if your licence is not enabled or you require a higher storage allotment.

MOBILITY

UNIVERGE BLUE® CONNECT mobile app allows you to place and receive calls, chats, text messages, attend meetings*, and manage your SHARE files* from anywhere as though you were in the office. Apps are available for iOS and Android in the respective App stores.

* features require UNIVERGE BLUE® MEET and SHARE apps to be installed.

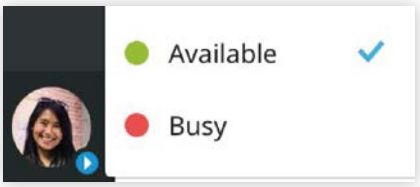
PRESENCE

Presence features within CONNECT help indicate to users which of their co-workers are available for collaboration and communication.

PRESENCE ICON	PRESENCE STATUS	HOW IS IT SET?
	Offline	Automatically - when a user's desktop goes offline
	Away	Automatically - when a user locks their computer or we detect no activity on the desktop for 10 min
	On a call/In a Meeting	Automatically - when a user is on a call or in a meeting
	Sharing Screen	Automatically when a user in a meeting sharing your screen
	Busy	Manually - when a user wants to indicate to others that they are busy and may not respond right away
	Available	Automatically or Manually. This status indicates that a user is available to chat or talk on the phone
	Do not Disturb	All calls will go to voicemail and chat notifications will be hidden

Setting your presence Manually

You can manually toggle your presence by hovering over your presence icon.



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OVER
$29 BILLION
REVENUE

#1
SMB & ENTERPRISE COMMS WORLDWIDE

LEADER IN
BIOMETRICS

75 MILLION
GLOBAL USERS

TOP 100
GLOBAL INNOVATORS
(THOMSON REUTERS)

RECOGNIZED AS A LEADER
BY FROST & SULLIVAN IN ENTERPRISE COMMUNICATIONS TRANSFORMATION

125+
COUNTRIES

GLOBAL 100
MOST SUSTAINABLE COMPANIES IN THE WORLD
(CORPORATE KNIGHTS)

107,000
TEAM MEMBERS
WORLDWIDE

4,000+
CHANNEL PARTNERS

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