

Navigate User Manual

April 2013



Navigate User Manual
Document No. 022
Version No. v3.2/0413/3

© Copyright SpliceCom Ltd

SpliceCom Ltd
The Hall Business Centre, Berry Lane
Chorleywood, Herts WD3 5EX
Tel: 01923 287700
Website: www.splicecom.com

Contents

Introduction.....	1
About this manual.....	1
How Navigate will operate	1
Feature Highlights.....	4
The PCS range	5
 Basic Call Handling	 6
Make a Call	6
Answer a Call	7
End a Call	8
Mute a call (IP soft phone only)	8
Place a call on hold	9
Transfer a Call	9
Call Information Window.....	10
Add a note to a call.....	11
Parking a call.....	12
Conference Call.....	14
Using the Directory.....	15
 Viewing your Calls History.....	 18
Identifying the type of call.....	18
Missed Incoming Calls	19
Redial a number	19
Dial a previous caller	19
Choose Number to Dial.....	20
Add Contact.....	20
Get Info.....	21
Nuisance Calls	21
 Users Directory	 23
View the Users Directory	23
Make a call to a User	23
Transfer a call to a User	24
View a User's Details.....	25
Make a call to a User's personal numbers	25
 Departments.....	 26
Working as a member of a Department.....	26
Receiving a Department Call	26
Make a call to a Department	26
Transfer a call to a Department	27
Calls History	27
Log in or out of a Group	28
 Contacts.....	 29
View the Contacts Directory	29
Receiving a call from a Contact	30
Make a call to a Contact	30

Transfer a call to a Contact	30
Make a call to a Contact's alternative numbers	31
Add a note to a Contact during a Call	31
Viewing Contact Details	32
Amend a Contact's details	33
Create a new Contact	34
Delete a Contact	36
Using an Ambiguous Number	36
Integration with your Outlook Contacts	36
User Configuration	38
Call Waiting	38
Call Forwarding	40
Out of Office Message	43
Do Not Disturb	45
Personal Numbers	47
Favourites	48
Ring Tunes	55
Extension Anywhere	57
Quick Settings	58
Voicemail	59
Receiving a Message	59
Listen to a message	59
Message Handling	61
Recording a Greeting	63
Using an Assistant telephone number	64
Ring back a caller	65
Leave a message for a colleague	65
Transfer a call to a colleague's voicemail	66
Record a Call	66
Record a Memo	66
Voicemail for Departments	67
Using Navigate as a Vision Call Centre Agent	69
Status Bar	69
Completion Codes	69
Not Available Codes	69
Navigate Configuration	70
Hot Desking/Log In	70
Manually label your parked calls	71
Favourites on Top	72
Partner Configuration	72
Softphone Configuration	73
Set up Information	74
Icons in Brief	75
Index	78

Introduction

About this manual

This manual contains all that you need to know to operate the Navigate application being run via a SpliceCom **maximiser** system using version 3.2 software. This manual assumes that the Navigate software has been loaded and configured on your PC by your system administrator. If this is not the case please refer to your System Administrator for further assistance.

How Navigate will operate

The Navigate software will be configured to run as an IP soft phone or as a partner to your telephone.

If your Navigate has been configured to partner your telephone handset this means that your telephone conversations will be via the handset but Navigate will assist you to handle calls quickly and efficiently. If you are using your telephone with a headset your conversations will be via your headset and you can use Navigate solely to handle the calls.

If your Navigate is running as an IP soft phone this means your PC becomes your telephone and you will require a headset and microphone connected in order to facilitate a telephone conversation.

When Navigate is installed on your PC a shortcut will be automatically created on your desktop, double click on this shortcut to run Navigate. Otherwise your system administrator will inform you how Navigate will start up on your PC.



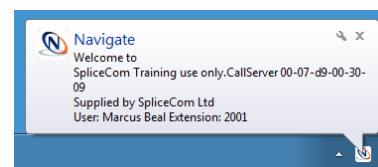
When the application is running, a Navigate icon will be displayed in the Notification Area of your Taskbar. This will display applicable information when you make and receive calls as described in the relevant section in this manual.



To ensure this facility is available your Notification Area (Windows 7) can be customised as follows:

1. Right click on the Taskbar on your PC and select Properties
2. Within the Notification Area section click on the Customize... button
3. Find Navigate within the list of Notification Area Icons
4. Ensure that Show Icon and Notifications or Only Show Notifications is selected
5. Select OK to save the change

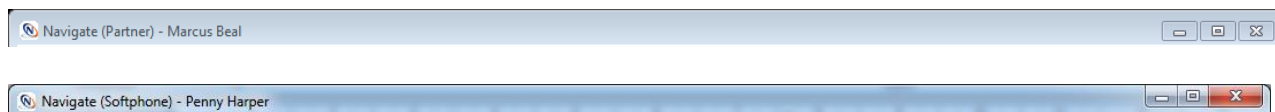
Information similar to this diagram will be displayed from the Notification Area when you first open Navigate. This will disappear after a few seconds.



Your User Account

You are a "User" of the SpliceCom **maximiser** telephone system and as such you have a User account on the system. Your User name will be used to identify you as you make, receive and transfer calls. Each of your colleagues will also have a User account and will be identified in the same way, by their User name. A list of the Users of your **maximiser** system can be viewed via the Directory page as explained in the Users Directory section from page 23.

Your User Name will appear in the Title Bar at the top of the application and in the Status Bar.

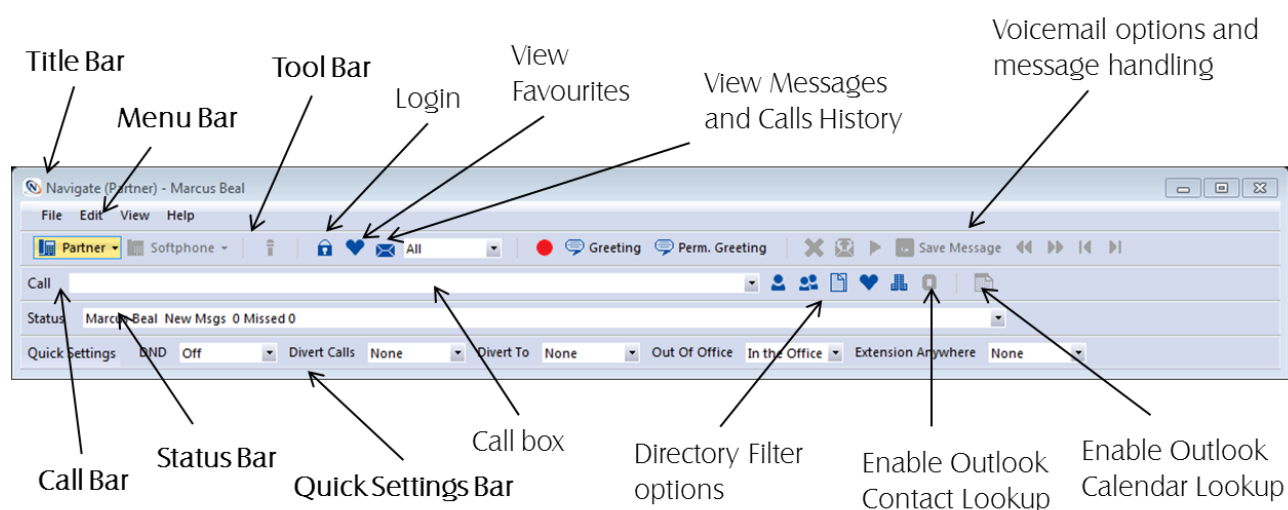


As a User on the system you will be given an extension number, eg 2021, and possibly a DDI number, eg 01632 563862. So that when a colleague rings your extension number or an external contact rings your DDI number these will be routed to your User account. Your DDI number may also be the number that is presented as your CLI when you make a call, please refer to your system administrator for further details.

In most implementations the telephone on your desk (partner mode) or your PC (IP soft phone) will be your permanent phone and as such it will have been automatically allocated to you by your system administrator. Therefore, your User account will be permanently logged on to this handset. However, you may wish to log on to another handset if you are required to work in another part of your office or at another site. If this is the case, please refer to the Hot Desking/Log In section from page 70 for further details.

Your User account will store all of your User settings (as described in the User Configuration section from page 38) so that when you log on to another handset these settings will be available to you and your calls will be routed to whichever phone you are logged on to.

Guided Tour of the application



Menu Bar

The Menu Bar gives you access to some of the features and settings available with Navigate. Click on the menu you require and a list of the selectable options is displayed. Click on the option required. Alternatively, hover over another menu and the relevant list will be displayed, this can be repeated until the option you require is selected. If you do not wish to select an option from a menu click on the menu name and it will disappear.

The Menu Bar can also be operated via your keyboard. Press the **Alt** key and the first letter of each menu will become underlined. Press the letter for the menu you require and a list of options will be displayed.

Use the Up and Down arrow keys to choose the option required. Use the Right and Left arrow keys to display another menu. Alternatively, press **F10** and use your arrow keys to display the menu required.

Tool Bar

This tool bar gives access to the Login, Favourites and Calls History windows, and voicemail message handling. Each icon is described in detail within the relevant section of this manual.

Call Bar

This bar is used to make calls and search the Directory. The Directory filter icons determine which entries are displayed within the Directory.

Status Bar

The Status Bar will display your name as the currently logged in User together with the number of new voicemail messages you have received, and the number of calls missed and not answered. This bar is purely for information that enables you, at a quick glance, to ascertain the status of your extension and is described further in the relevant sections of this manual. If your User account has also be configured to monitor calls and voicemail for a Department(s) the Status Bar will also show these statistics for this Department(s). Click on the list box arrow to view and select the details for the Department(s).

Quick Settings Bar

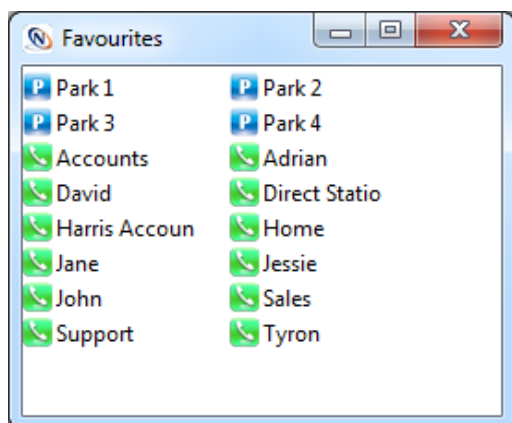
These list boxes allow you to quickly turn on/off regularly used configuration settings such as Do Not Disturb and Follow Me. Each option is described in more detail in the relevant section of this manual. Please note: if your Quick Settings Bar is not displayed you have been given restricted access to your configuration options. Please refer to your System Administrator for further information.

Call Status pane

Call Status will appear when you are on a call. This will display the name of the person you have called or the caller (if known by the system), the number you have dialled or received, your name and the length of time of the call, together with call handling icons on the right hand side which will be covered in the relevant section of this manual.



Favourites window



The Favourites window will display your Park slot icons and Favourites (speed dials).

This window can be displayed by selecting the Favourites icon ♥ on the Tool bar or by selecting Favourites from the View menu.

This window enables you to quickly and easily make calls, park calls, transfer calls and pick up calls.

To close this window click on the Favourites icon again or use the Close button.

Feature Highlights

Access to the System Database

Navigate gives you access to a database of information stored on your **maximiser** system that provides directories of telephone numbers to help you to quickly and easily make and transfer calls.

Making Notes during a call

During the process of a call you can attach a note that will help you to remember the caller's name and details or the nature of the call. This text will then follow the call when it is transferred to help the recipient deal with the call proficiently. If the call is received from or made to an external number stored on the central database a note can be saved for future use and referred to at a later date.

Parking a Call

All calls received can be put on hold and the call remains in your control. However, another way to place a call on hold is to park the call into one of the system areas (or Park Slot). You can use this method to place a call on hold while you deal with another call or as a way of transferring the call as your colleagues will be able to pick up the call if they have access to the same park slot.

Favourites

As well as access to the directories stored on the telephone system's database you can also set up your own list of "favourite" numbers that you regularly call or transfer calls to. Your Favourites will also act as Busy Lamp Fields indicating when internal extensions are engaged or receiving calls and allow you to pick up a call ringing on a colleague's extension.

Voicemail

The SpliceCom **maximiser** system provides standard voicemail functionality which can be enabled on your system and for you as a User allowing your callers to leave a message if you are unable to deal with a call. Navigate allows you to easily manage these messages.

Hot Desking

If you share your PC or telephone handset with other colleagues Navigate will allow you and your colleagues to log in using your own extension number and access code so that you can use your own settings and be identified with your name when you make and receive calls.

Microsoft Outlook Integration

If you use Microsoft Outlook for your calendar and for storing your contacts, your User account can be configured to enable you to turn on Outlook Contact Lookup and Outlook Calendar Lookup in Navigate. Outlook Contact Lookup will enable Navigate to search within your Contacts so that you can easily and quickly dial numbers stored in your Outlook Contacts. The Outlook Calendar Lookup will enable Navigate to turn on Do Not Disturb if you have an appointment scheduled that is set as Busy or Out of Office, and if that appointment contains one of the five Out of Office Messages (In Meeting, At Lunch, On Holiday, Off Site and In the Office) in the body of the appointment this will set your Out of Office message at the relevant time.

The PCS range

From affordable entry-level phones, through IP terminals that unify advanced telephony and IT applications at the desktop, to native IP Phone applications that run on Smart Phones, Tablets, PCs and Macs; in SpliceCom's comprehensive PCS telephony family you'll find the product that's the ideal match for every specific business requirement - whatever it may be.

Designed to complement other market leading and stylish IT equipment on your desktop, SpliceCom's PCS 552, PCS 56x, PCS 57xG & PCS 58xG IP Phones combine looks, intelligence and desirability in equal measure. The world's slimmest desktop IP phones provide easy access to the benefits delivered by **maximiser**, SpliceCom's range of innovative and award-winning Unified Communications platforms. All PCS 5xx IP phones have large graphical displays, intuitive multi-functional context sensitive keys, and bold instantly recognisable icons to provide the ease-of-use associated with mobile phones, so delivering the ultimate business telephony user experience.

The IP 530 is SpliceCom's entry-level IP Phone, designed to work with **maximiser** to address everyday business telephony needs. The PCS 520 is a display phone with pre-configured system access keys, desktop paging and combined Do Not Disturb/Message Waiting LED, with the entry-level PCS 505 completing SpliceCom's range of desktop phones.

SpliceCom's iPCS is a native IP Phone application for Smart Phones and Tablets, allowing a mobile device to operate as a highly functional system phone extension. This makes it an ideal **maximiser** Office Mobility solution for the replacement of existing DECT wireless systems, or as an alternative for SIP/WiFi phones.

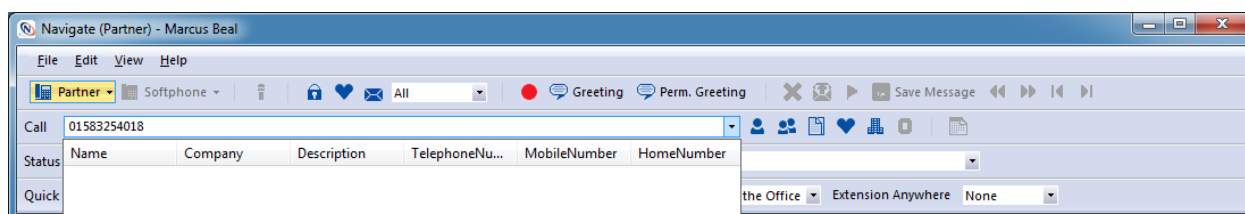
Navigate is a Phone Partner application, delivering powerful personal call management features via Windows 7 & Windows 8 PCs for users of SpliceCom's broad range of PCS IP Phones, or existing 3rd party analogue telephones. Providing point and click access to both commonly used and advanced **maximiser** telephony & integrated Microsoft features, Navigate provides a single intuitive interface to manage business communications for all employees across an organization, irrespective of their role. Navigate can also be used as an IP Softphone with the addition of an associated licence, with PCS 60 offering similar functionality for Apple Mac OS X users and those running versions of Microsoft operating systems prior to Windows 7.



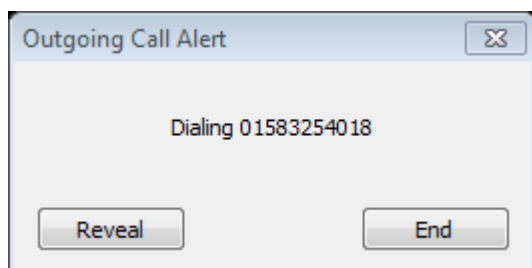
Basic Call Handling

Make a Call

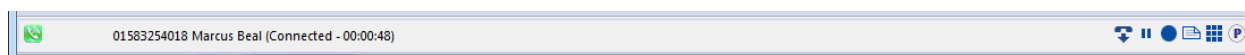
1. In the Call box enter the number to be dialled (internal or external number).
2. Press Enter and the call will be made.






The Outgoing Call Alert window will appear from the Navigation icon in the Notification Area and display the number you have dialled.



Call Status will display the name of the person you have called (if known by the system), the number you have dialled, your name and length of time of the call, together with call handling icons on the right hand side which will be covered in the relevant section of this manual.



The unanswered call icon  will be displayed until the call is answered when it will be replaced by the answered call icon .


If you have started to make a call, have changed your mind and wish to stop the call either replace your handset (partner mode) or select End from the Outgoing Call Alert window or select the Hang Up icon  or press **Esc**.

Please note that if you are using Navigate in partner mode, the telephone conversation will proceed via your handset. Your telephone will ring if a call is made and the handset has not been lifted. If you dial a number via your handset Call Status will appear as soon as you lift your handset and display the number you have dialled. If Navigate is hidden behind other windows or has been minimised select the Reveal button on the Outgoing Call Alert window and Navigate will become the active window.

If you wish to make a call by looking up the number in the system directories please refer to the Make a call via the Directory page from page 16.

Entering additional digits

You may be required to enter further digits once a call has been made, for example, when presented with an auto attendant, this can be done as follows:

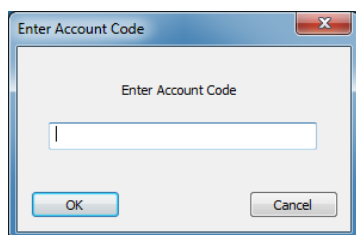
1. Within the Call Status pane click on the Dial icon 
2. The Keypad window will be displayed
3. Select the number(s) required either by clicking on the numbers with your mouse or enter the numbers on your keyboard.
4. Each number will flash as you enter it.
5. Use the Close icon at the top right to close the Keypad window when you have finished.



Account Codes

Accounts codes on a **maximiser** system enable calls to be tracked. This feature would be useful if you wish to bill customers for time spent on their job or calculate the cost of a project, for example. Please refer to your system administrator for further details if you wish to use this facility.

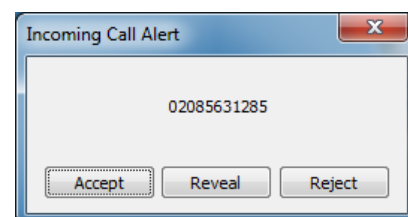
Once configured on your system, you can enter the account code when you dial the number (please refer to your system administrator for the relevant digits to enter). Alternatively, your User account can be configured so that you can only make an external call if you enter an Account Code, please refer to your system administrator for further details. If this is the case, the following dialogue box will be displayed from the Navigation icon within your Notification Area, when you make an external call:



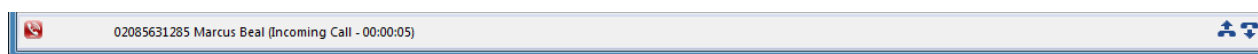
Enter the code you wish to use in the Enter Account Code field and select OK. Proceed with the call as normal.

Answer a Call


When you receive a call the caller's details will be displayed in the Incoming Call Alert window, which will appear from the Navigate icon in the Notification Area.



Call Status will display the caller's name (if recognised by the system), the caller's number and who the call is for. This will either be your name, the name of the colleague who has forwarded their calls to you or a Department name. All this information enables you to answer the call in the required manner.



If Navigate is hidden behind other windows or has been minimised and you wish to bring it forward, select the Reveal button on the Incoming Call Alert window and Navigate will become the active window.


To answer the call, lift your handset (partner mode only)
or
Select the Answer icon , from Call Status
or
Select Accept from the Incoming Call Alert window
or
Press **Enter**

Please note that if you are using Navigate in partner mode, the telephone conversation will proceed via your handset. If you answer a call via Navigate your handset will continue to ring until the handset has been lifted.

Call Status will display the name of the caller (if known by the system), the number received with the call, your name and length of time of the call, together with call handling icons on the right hand side which will be covered in the relevant section of this manual.




Reject a call

1. If you do not wish to answer the call,
Replace select the Hang Up icon , from Call Status
or
Select Reject from the Incoming Call Alert window
or
Press **Esc**
2. The call will be passed to your Forward on Busy number (if set), or voicemail (if enabled), or cancelled



If you do not answer it will be passed to your Forward on No Answer number (if set), or voicemail (if enabled) or will continue to ring until the caller hangs up. The amount of time the call will ring before going to your Forward on No Answer number or voicemail will be dependent on the time set on your User account, please refer to your system administrator for further details.

End a Call

Replace your handset (partner mode only)
or
Select the Hang Up icon , from Call Status
or
Press **Esc**

Mute a call (IP soft phone only)

The Mute facility will allow you to prevent a caller from hearing, for example, your conversation with another colleague. You will be able to hear the caller but they will not be able to hear you.

1. Select the Mute icon 
2. The Mute icon will be displayed with a red circle  to indicate that this facility is on. Your caller will be unable to hear you.
3. Select this icon again to talk to your caller

Place a call on hold


1. From Call Status, select the Hold icon .
2. Note that the Hold icon is now displayed on the left hand side of Call Status, with the call details, indicating that this call is on hold

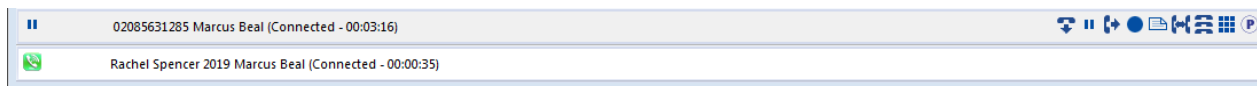
External callers will be played “music on hold” if configured. (Please refer to your System Administrator for further details.)


To retrieve the call, click on the call details within Call Status, or select the Hang Up  icon

Transfer a Call


Announced Transfer

1. Place the call on hold by selecting the Hold icon .
 2. In the Call box enter the number to be dialled (internal or external number)
 3. Press **Enter**
- or
1. In the Call box enter the number to be dialled (internal or external number)
 2. Press **Enter** (the original call will be put on hold)
 3. Wait for the call to be answered and announce the caller
4. The two calls will be displayed in Call Status together with additional call handling icons.





5. To transfer the original call, select the Transfer icon , from Call Status
or
press **Enter**.
You will no longer have control of the call

or


5. To clear the current call and return to the original caller select the Hang Up icon 
or
press **Esc**
or
wait for the other end to hang up.

or

5. To return to the original call and place the second call on hold, select the Switch icon 
or
click on the original call within Call Status
6. Use the Switch icon to toggle between the two calls,
or
click on the required call within Call Status (note that the Call Handling icons will be displayed alongside the active call)

7. Finally, select the Transfer icon  to connect the two calls (regardless of which call you are currently connected to).


or

5. Select the Hang Up icon  to clear the call you are currently connected to and return to the other call
or
wait for the other end to hang up

Please note:

- The green telephone icon  indicates the call you are currently connected to
- The Hold icon  indicates the call currently on hold.

Unannounced Transfer (Blind Transfer)

1. Place the call on hold by selecting the Hold icon 
2. In the Call box enter the number to be dialled (internal or external number).
3. Press **Enter**

or

1. In the Call box enter the number to be dialled (internal or external number).
2. Press **Enter**
3. The original call will be put on hold

4. Once the ringing tone is heard,

Select the Transfer icon 

or

Press **Enter**

or

Replace your handset (partner mode only)

You will no longer have control of the call.

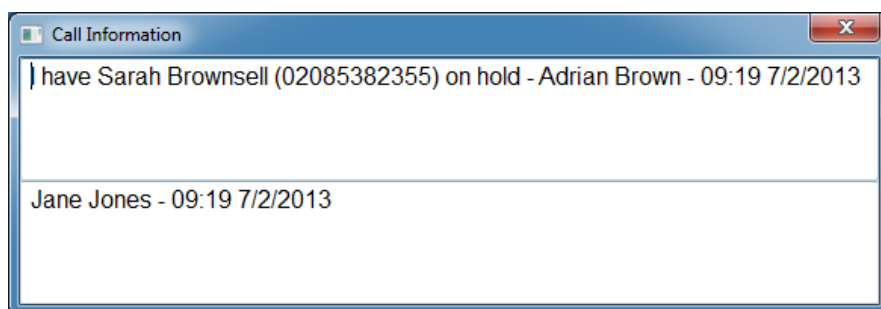
Call Information Window

The Call Information window will give you information about your current call and help you deal with the call, particularly when a colleague is transferring a call to you as explained below, and when using Notes as explained in the Add a note to a call section from page 11.

Open the Call Information window – from the View menu select Call Information.

If you receive a call from a colleague who has another call on hold the following information will be displayed.

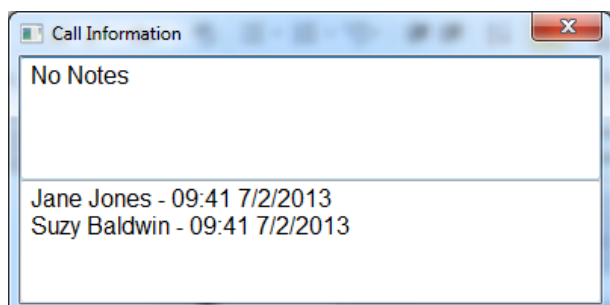
“I have [caller’s name if recognised by the system] (caller’s number) on hold – [name of User making the call to you] – time and date.”



Once the call has been transferred the history of the call will be displayed in the Call Information window, ie the name(s) of the User(s) who transferred the call together with your name as the next recipient of the call.




If you are the recipient of an unannounced transfer the Call Information window will display the name of the User who transferred the call together with your name as the next recipient of the call.

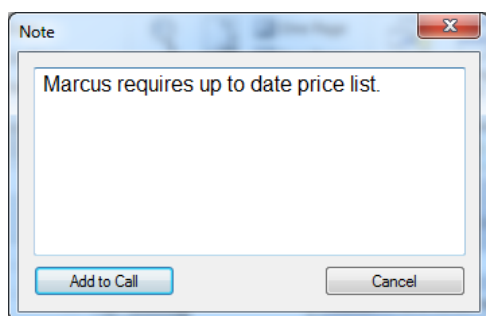


Close the Call Information window when you no longer wish to view this information, otherwise it will automatically close at the end of the call.

Add a note to a call

During a call you may wish to make notes about the call, for example, the caller's name, the details of his enquiry, etc. This information not only acts as a reminder for you but will also be passed to another User of Navigate, PCS 60 and PCS 58x/57x/56x when the call is transferred.

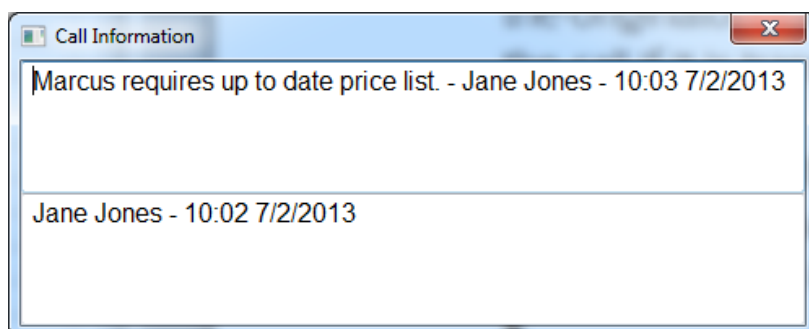
1. During a call click on the Add Note icon  from the Call Status pane
2. Enter any text in the Note box



3. Select Add to Call

Please note that if the Add to Contact button is available in the Note box this means that the call has been made to or received from a number stored in the Contacts Directory. Please refer to the Contacts section from page 29 for further details.

This Note can be viewed in the Call Information window (from the View menu select Call Information). The text together with your name as the originator of the note and the date and time will be displayed. This information will be passed on with the call if it is transferred, and will disappear once the call has ended.

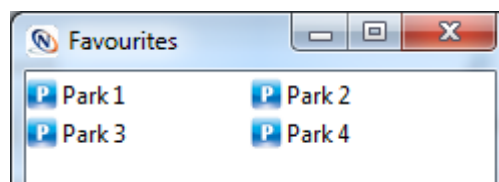


The Call Information window will also display Notes added by a colleague when they are transferring a call to you, for example.

Parking a call


The Park facility allows calls to be put on hold in a system area, rather than on your phone. Either, a colleague can pick up the call (if they have access to the same park slot), or you can pick up the call when you wish to return to the caller. This is useful as another method to transfer a call, or if you wish to deal with other calls while a call is on hold.

By default, you will be given access to Park slots 1, 2, 3 and 4 via the four Park icons displayed in the Favourites window. By default, all your colleagues using Navigate, PCS 60 or PCS 58x/57x/56x will also have access to these same park slots. (This default configuration may be different on your system, please refer to your system administrator for further details.)



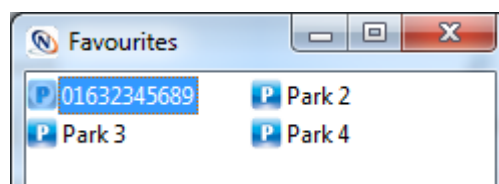
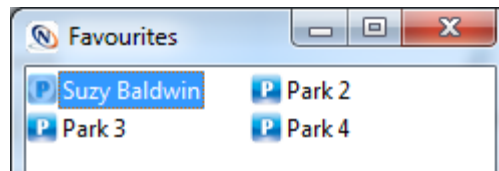
A call will remain parked for 5 minutes (default), after this time the call will be represented to your extension and you can answer the call in the normal way.

Park a call

1. Click on the Park Call icon , on the far right hand side of Call Status
2. The call will be parked in your first available park slot

If you wish to view the parked call select the Favourites icon  to open the Favourites window, if not already open.


The details of the caller will be displayed within the Park icon




If there are calls parked in all of your Park slots (please remember that these slots may be shared by other Users on your telephone system) your call will not be parked and the “No free park slots” message will be displayed from the Navigate icon within your Notification Area.





Alternatively,

1. Click on the Favourites icon  to open the Favourites window, if not already open
2. Click on Park icon required
3. The details of the caller will be displayed with the Park icon

Pick up a parked call

1. Click on the Favourites icon  to open the Favourites window, if not already open
2. Click on the Park icon displaying the call you wish to return to

Transfer a parked call

1. Make a call to the intended recipient of the parked call (internal or external number).
2. Place the call on hold
3. Click on the Favourites icon  to open the Favourites window, if not already open
4. Click on the relevant Park icon to un-park the original call
5. The two calls will be displayed in Call Status
6. To connect the two calls select the Transfer icon . You will no longer have control of the calls.

For further information on transferring calls please refer to page 9.

The Favourites window will stay open so that your Favourites and Park icons are constantly available. Use the Close icon if you no longer wish to view or use this window.

Please note:

- If your Park Label option is turned on, the “Enter park label” dialogue box will appear when you click on a Park icon. Please refer to the Manually label your parked calls section from page 71 for further details.

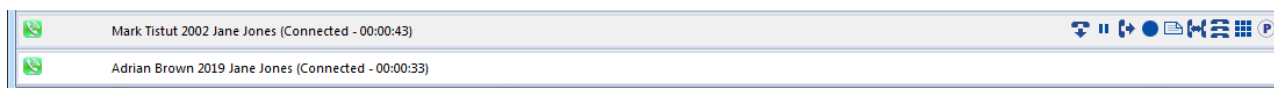
- If you pick up a parked call while in the progress of another call, this call will be automatically parked in the next available slot.
- If a colleague needs to pick up a parked call via an analogue handset and does not have the use of Navigate or PCS 60, please refer to your system administrator for the relevant short code he/she should use.
- If a call parked by a colleague is not accessible via your Park icons, your Park slots may have been configured differently or you may be operating within a different "Company" to your colleague. Please refer to your system administrator for further details.
- If you belong to a "Company" on the **maximiser** system, this Company may be configured with a different Park Timeout to the default 5 minutes. Please refer to your system administrator for further details.
- By default the four Park icons displayed are configured to access Park slots 1, 2, 3 and 4. However if you wish to access alternative Park slots in order to create either group or "private" park slots you can create icons to access other Park Slots, eg Park slot 5, or Park slot 7, 60, 123 etc. Please refer to the Favourite section from page 48 for further details.
- If you do not use the Park facility and wish to remove the Park icons, please refer to the Favourite section from page 48



Conference Call

The conferencing facility allows you to create a 3-way conversation between yourself and two internal and/or external calls. (Please note that this feature must be enabled on your telephone system. Please refer to your System Administrator if this feature is not available.)

Creating a conference call


1. Make a call to the first number required (internal or external), or you may have already received a call from the first member of the conference.
2. Placed this call on hold
3. Make a call to the second number required (internal or external)





4. Once the call has been answered select the Conference icon .
5. You are now in a 3-way conference with your two calls, as shown by the In Conference icon .


Cancel a conference call

You may wish to cancel the conference and return to a 2-way conversation with your calls as follows.

1. Select the In Conference icon .
2. You will return to the caller that you were last speaking to before creating the conference. The other caller will be put on hold.

Use the Switch icon  to toggle between the two calls or click on the call required in Call Status (note that the Call Handling icons are displayed alongside the active call). The two calls can be connected via the Transfer icon  or ended in the normal way.

You can return to a conference with your two calls at any time by selecting the In Conference icon .

If you select the Hang Up icon  while on a conference you will hang up the caller that you were last speaking to before creating the conference, and return to a 2-way conversation with the other call.

If one of the conference members hangs up you will return to a 2-way conversation with the other caller.






End a conference call (partner mode only)

If you replace your handset while on a conference call, you will end the conference and hang up all the calls.

Using the Directory

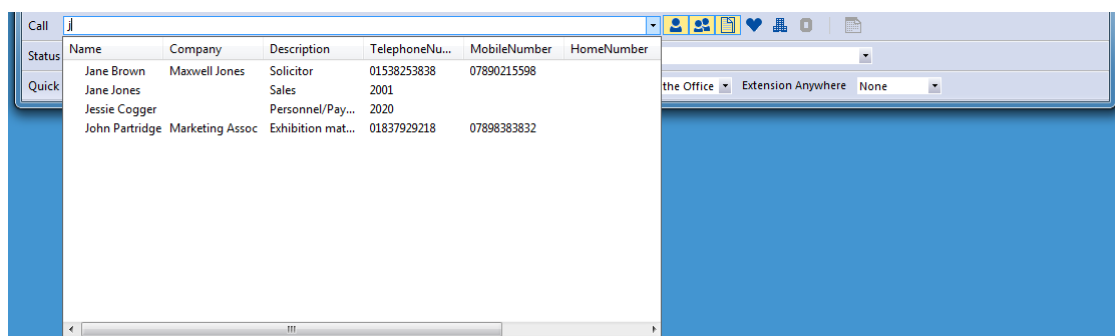
The Directory provides access to a database of contact information that is stored centrally on your telephone system. Your System Administrator is responsible for the maintenance of this database and will be able to assist you with your queries.

The type of records displayed is determined by the Directory Filter icons displayed beside the Call box. Select or de-select the options as required.



- **Users Filter**  will display a list of the User accounts on your telephone system allowing you to quickly and easily call a colleague.
- **Departments Filter**  will give access to the list of Departments configured on your **maximiser** system that will allow your call to be routed efficiently to a group of Users.
- **Contacts Filter**  will display the list of external contacts entered on your telephone system allowing you to quickly and easily make calls to customers, suppliers, etc. The search will be made within the Name column.
- **Company Filter**  will display the list of external contacts entered on your telephone system allowing you to quickly and easily make calls to customers, suppliers, etc. The search will be made within the Company column.
- **Favourites Filter**  will display your personal list of regularly used telephone numbers stored in your User account. Please refer to the Favourites section from page 48 for further details.

View the Directory

1. In the Call box enter the name or number of the User or Department or Contact or Company you wish to view
2. As you starting typing the list of the records matching the text you have entered will be displayed.



You can enter an asterisk (*) in to the Call box to view all the records in one list (dependent on the Directory Filter icons selected).

Name	Company	Description	TelephoneNumber	MobileNumber
 Adrian Brown	Epson	Director	2019	07890329818
April Brown			02082938837	07829838384
 David Exeter	Maxwell Jones	Support	2017	07893289332
Jane Brown		Solicitor	01538253838	07890215598
Jane Jones		Sales	2001	07890183838
Jessie Cogger	Marketing Assoc	Personnel/Payroll	2020	
John Partridge		Exhibition material	01837929218	07898383832
Mark Hogg		Stationery	02088269156	07890543112
Mark Tistut	Richmond Photocopiers	Sales	2002	
Mike Harrison		Photocopier Support	01483283983	07930532828
Reception			8000	
Richard Inspire	Dell	Sales	02083838389	07890621977
Sales			8001	
Sarah Brownell	Highland Ltd		02085382355	



The Busy icon indicates that this colleague is currently on a call. If you ring this number you will be passed to the User's Forward on Busy number (if set) or to their voicemail (if enabled) or you will get busy.



The Do Not Disturb icon indicates that this colleague has Do Not Disturb set. If you ring this number you will be passed to the User's Forward on Busy number (if set) or to their voicemail (if enabled) or you will get busy.


Each column displayed in the Directory can be resized by pointing at the line to the right of the column title with your mouse. A double headed arrow shape will appear. Hold down your mouse and move the column to the left or right.

If you no longer wish to view the Directory, click on the down arrow next to Call box or press Esc on your keyboard, and the directory will disappear.

Make a call via the Directory page

1. In the Call Box enter the name or number of the User or Department or Contact or Company to be dialled.
2. As you start typing the list of the records matching the text you have entered will be displayed (dependent on the Directory Filter icons selected).
3. When the entry you require is displayed,
 - Click on the number you wish to dial, and the call will be made.
 - or
 - Double click on the Name, and the number displayed in the Telephone Number column will be dialled.

Transfer a call via the Directory page

1. Place the call on hold by selecting the Hold icon .
2. In the Call box enter the name or number of the User or Department or Contact or Company to be dialled.
3. When the entry you require is displayed,
 - Click on the number you wish to dial, and the call will be made.
 - or

- Double click on the name, and the number displayed in the Telephone Number column will be used.
4. Wait for the call to be answered and announce the caller
 5. To connect the two calls, select the Transfer icon . You will no longer have control of the calls.



Please note that if you wish to continue talking to the caller while using the Directory ignore step 1. The caller will be put on hold once you make the call in step 4.

For further information on transferring a call please refer to page 9.

Please refer to the Users Directory section from page 23, the Departments section from page 26 and the Contacts section from page 29 for further details on using the Directory.

Viewing your Calls History

All calls received or made by your extension will be logged and can be viewed via the Messages icon .

When a call has been received that you did not answer the Messages icon will be displayed with the Missed Call symbol  to indicate that you have missed a call. If you have missed a call and have received a new voicemail message the Messages icon will be displayed with a handset and red circle in the background . Click on either of these icons to view your Calls History.

Identifying the type of call



Signifies an answered incoming call



Signifies an unanswered (or missed) incoming call (up to 10 displayed, then the oldest will be deleted)



Signifies an answered outgoing call



Signifies an unanswered outgoing call

















Signifies a new or unread voicemail message



Signifies an old or read voicemail message


Entries are listed in date and time order with the newest at the top.

The time and date of each call will be displayed; together with the caller's or recipient's name (if recognised by the system) and the caller's number (if received) or recipient's number.


Time	Name	Number	Mailbox
 13:50 7/2/2013	Adrian Brown	2019	Jane Jones
 13:43 7/2/2013	David Exeter	2017	Jane Jones
 13:43 7/2/2013	Adrian Brown	2019	Jane Jones
 13:39 7/2/2013	201720	201720	Jane Jones
 13:39 7/2/2013	Adrian Brown	2019	Jane Jones
 13:14 7/2/2013	Adrian Brown	07890329818	Jane Jones
 13:13 7/2/2013	Adrian Brown	2019	Jane Jones
 13:13 7/2/2013	Adrian Brown	2019	Jane Jones
 13:11 7/2/2013	John Partridge	07898383832	Jane Jones
 13:11 7/2/2013	John Partridge	07898383832	Jane Jones
 13:02 7/2/2013	Extn2010	2010	Jane Jones
 11:30 7/2/2013	Mark Tistut	2002	Jane Jones
 11:27 7/2/2013	Suzy Baldwin	2018	Jane Jones
 11:27 7/2/2013	Adrian Brown	2019	Jane Jones

The Mailbox column will display your name as the creator of the call or, for incoming calls, will indicate the recipient of the call. This will be your name, or if you are receiving Department calls, the Department's name (please refer to the section Departments from page 26 for further details), or a colleague's name if he/she has forwarded his/her calls to your extension.

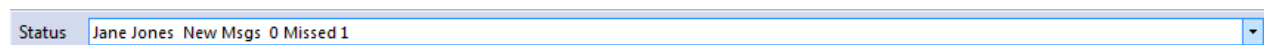
Each column can be resized by pointing at the line to the right of the column title with your mouse. A double headed arrow shape will appear. Hold down your mouse and move the column to the left or right.

If you no longer wish to view Calls History, click on the down arrow next to Call box or press Esc on your keyboard or click on the Messages icon , and the directory will disappear.

Missed Incoming Calls

When a call has been received that you did not answer the Messages icon will be displayed with the Missed Call symbol  to indicate that you have missed a call. Once you have viewed the missed call, by clicking on the Messages icon, this symbol will disappear. Please note that if a call is answered by voicemail and the caller has left a message, this call will not be registered as a missed call.

The Status Bar will also indicate the number of calls missed on your extension.



The Navigate icon on your Task Bar will also indicate if you have missed a call.





If you hover your mouse over the Navigate icon within the Notification Area the number of calls you have missed will be displayed.





Redial a number

When you make a call the details of the call are logged and can be viewed via the Messages icon. This information enables you to redial the number quickly and easily.

1. Select the Messages icon
2. The  and  icons indicate a number you have previously dialled
3. Click on the number you wish to dial
or
Double click on the entry required (within the Time column) and the number displayed will be dialled.

Dial a previous caller

When you receive a call the details of the call are logged and can be viewed via the Messages icon. This information enables you to ring back the caller quickly and easily.

1. Select the Messages icon
2. The  and  icons indicate an incoming call
3. Double click on the entry required and the number displayed will be dialled

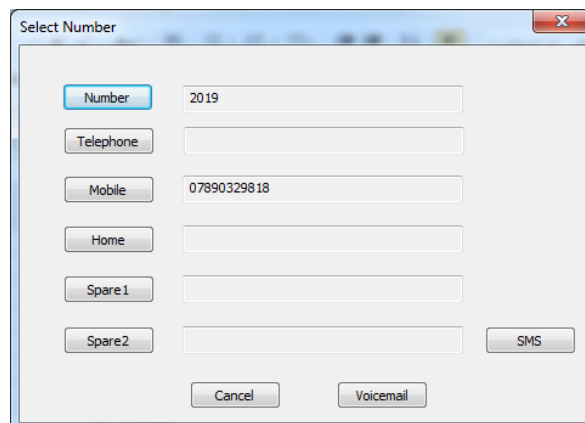
If the caller's number has been withheld or not received by the system this facility will not be available. The Number column will indicate if the caller's telephone number has been received.

Choose Number to Dial

You can dial another number, eg a mobile number, stored with the number displayed in the selected call, if this number is recognised by the system, ie an extension number, or a number stored in a User's personal numbers, or a number stored in a Contact.

1. Right click on the entry required
2. Select Choose number to dial
3. The Select Number window will be displayed
4. Click on the relevant button to dial the number required

Please refer to the Users Directory section from page 23 and the Contacts section from page 29 for further details.

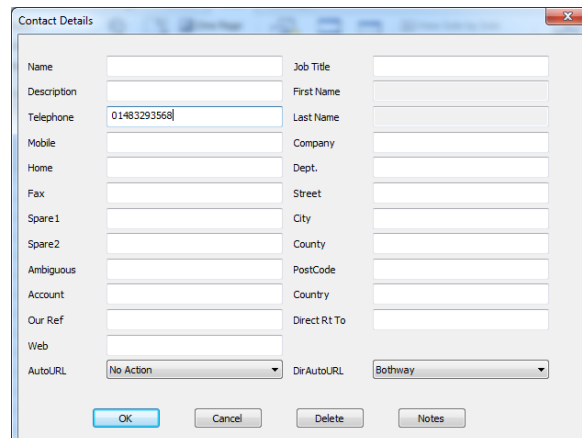


The 'Select Number' dialog box contains several input fields and buttons. On the left, there are buttons for 'Number', 'Telephone', 'Mobile', 'Home', 'Spare1', and 'Spare2'. To the right of these buttons are corresponding text input fields. The 'Number' field contains the value '2019', and the 'Mobile' field contains '07890329818'. At the bottom right, there is an 'SMS' button. At the bottom center, there are 'Cancel' and 'Voicemail' buttons.

Add Contact

If you wish to store the external number received with a call in the centralised Contacts database, the Add Contact option will allow you to create a new Contact where the external number displayed in the selected call will automatically populate the Telephone field.

1. Right click on the entry required
2. Select Add Contact
3. The Contact Details dialogue box will be displayed
4. The telephone number received with the call will be entered into the Telephone field.
5. Enter further details as required
6. Select OK when ready.



The 'Contact Details' dialog box is a form for creating or editing a contact. It has two columns of fields. The left column includes: Name, Description, Telephone (pre-filled with '01483293568'), Mobile, Home, Fax, Spare1, Spare2, Ambiguous, Account, Our Ref, Web, and AutoURL (a dropdown menu set to 'No Action'). The right column includes: Job Title, First Name, Last Name, Company, Dept., Street, City, County, PostCode, Country, Direct Rt To, and DirAutoURL (a dropdown menu set to 'Bothway'). At the bottom, there are four buttons: 'OK', 'Cancel', 'Delete', and 'Notes'.

Please note

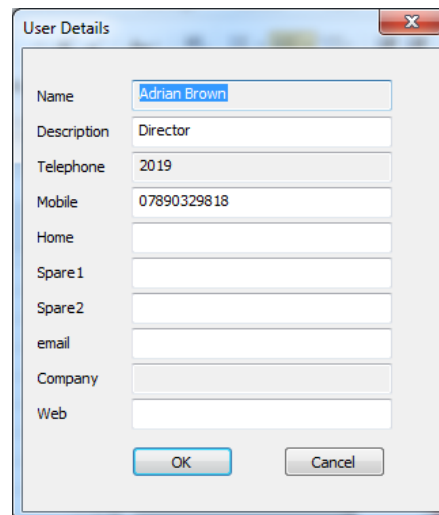
- This entry will be stored in the centralised Contacts database and will be available to all your colleagues.
- If you select this option for an internal call, the User Details form will open.
- If you select this option for a number already stored in the Contacts database the relevant Contact Details form will open.
- If the Contact Details dialogue box does not appear when you select this option you do not have the rights to add entries to the Contacts database. Please refer to your system administrator for further details.

Please refer to the Contacts section from page 29 for further details on using the Contacts database.

Get Info

Further details, stored on the system, for the internal or external number displayed can be viewed via the Get Info option. The relevant User Details or Contact Details dialogue box will open.

1. Right click on the entry required
2. Select Get Info
3. The Contact Details or User Details dialogue box will be displayed
4. Select OK when finished.



The image shows a 'User Details' dialogue box with the following fields and values:

Field	Value
Name	Adrian Brown
Description	Director
Telephone	2019
Mobile	07890329818
Home	
Spare1	
Spare2	
email	
Company	
Web	

At the bottom of the box are 'OK' and 'Cancel' buttons.

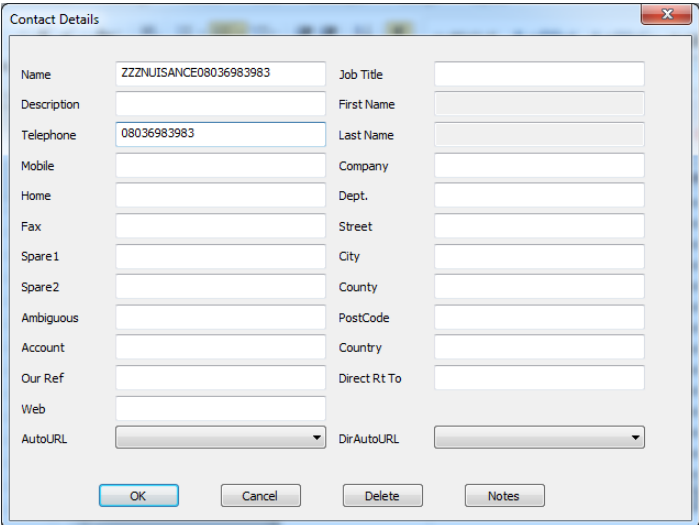
Please note that if the number displayed is not stored on the system the Contact Details dialogue box will open and the number will be entered into the Telephone field. Further details can be added, and if you select OK this entry will be stored in central Contacts database. If the Contact Details dialogue box does not appear, you do not have the rights to add entries to the Contacts database, please refer to your system administrator for further details..

Please refer to the Contacts section from page 29 for further details on using the Contacts database.

Nuisance Calls

The Add to Blacklist option will allow you to black list incoming external numbers so that you will no longer receive a call from this number; the caller will either be routed to another User or Department, or played a message. However this facility must be available on your system, please refer to your System Administrator for further information.

1. Right click on the entry required
2. Select Add To Blacklist
3. The Contact Details dialogue box will be displayed with ZZZNUISANCE<number> entered in the Name field and number entered in the Telephone field.
4. Further details can be entered if required
5. Select OK when finished.



The image shows a 'Contact Details' dialogue box with the following fields and controls:

Name	ZZZNUISANCE08036983983	Job Title	
Description		First Name	
Telephone	08036983983	Last Name	
Mobile		Company	
Home		Dept.	
Fax		Street	
Spare 1		City	
Spare 2		County	
Ambiguous		PostCode	
Account		Country	
Our Ref		Direct Rt To	
Web			
AutoURL		DirAutoURL	


At the bottom of the dialogue box are four buttons: OK, Cancel, Delete, and Notes.

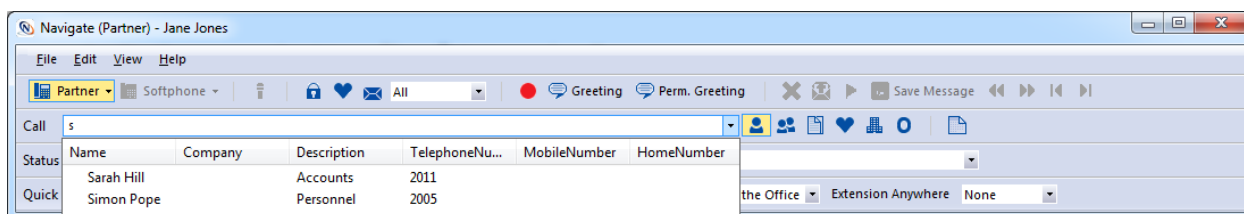
Users Directory

The Users Directory allows you to quickly and easily call a colleague without having to remember their extension number. This directory also allows you to call a colleague's mobile or home number, if stored in their User account, and makes it easy for you to transfer calls to all these numbers.



Please refer to the Your User Account section from page 1 for further details.

View the Users Directory

1. Firstly, ensure the Users filter  is turned on
2. In the Call box enter the name or number of the colleague you wish to view
3. As you starting typing the list of the records matching the text you have entered will be displayed.



You can enter an asterisk (*) in to the Call box to view all the records in one list (dependent on the Directory Filter icons selected).

Name	Company	Description	TelephoneNu...	MobileNumber	HomeNumber
 Adrian Brown		Director	2019	07890329818	
April Day		Sales	2030		
David Exeter		Support	2017	07893289332	01534192256
Jane Jones		Sales	2001	07890183838	01923283983
 Jessie Cogger		Personnel/Pay...	2020		
Mark Tistut		Sales	2002	07711278699	
Sarah Hill		Accounts	2011		
Simon Pope		Personnel	2005		
Suzy Baldwin		Support	2018	07653211883	




The Busy icon indicates that this colleague is currently on a call. If you ring this number you will be passed to the User's Forward on Busy number (if set) or to their voicemail (if enable) or you will get busy.



The Do Not Disturb icon indicates that this colleague has Do Not Disturb set. If you ring this number you will be passed to the User's Forward on Busy number (if set) or to their voicemail (if enabled) or you will get busy.

Make a call to a User



1. Firstly, ensure the Users filter  is turned on
2. In the Call box enter the name or extension number of the User to be dialled.

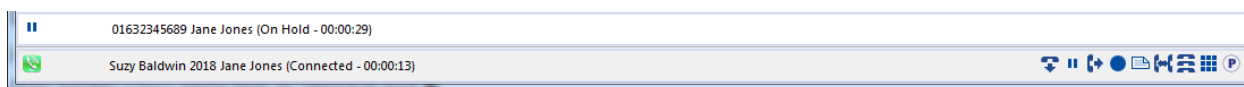
3. As you starting typing the list of the records matching the text you have entered will be displayed.
4. When the entry you require is displayed,
Click on the number you wish to dial, and the call will be made.
or
Double click on the Name and the extension number displayed in the Telephone Number field will be dialled.

Call Status will display the name and number of the User you are calling.



Transfer a call to a User

1. Place the call on hold by selecting the Hold icon 
2. Ensure the Users filter  is turned on
3. In the Call box enter the name or number of the User to be dialled.
4. As you starting typing the list of the records matching the text you have entered will be displayed.
5. When the entry you require is displayed,
Click on the number you wish to dial, and the call will be made.
or
Double click on the Name and the extension number displayed in the Telephone Number field will be dialled.
6. Wait for the call to be answered and announce the caller




7. To transfer the original call select the Transfer icon . You will no longer have control of the call.

Please note that if you wish to continue talking to the caller while using the Directory ignore step 1. The caller will be put on hold once you make the call in step 4.

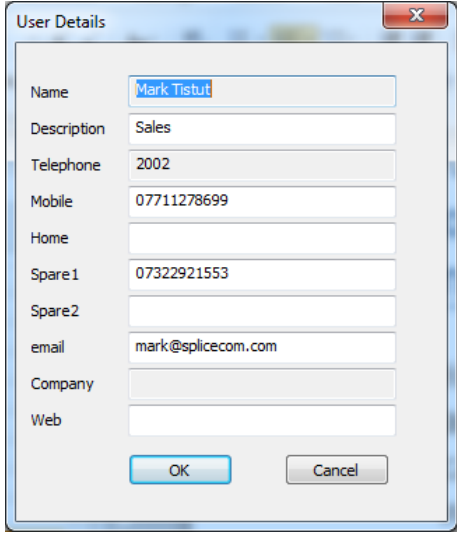
For further information on transferring a call please refer to page 9.

View a User's Details

1. Firstly, ensure the Users filter  is turned on
2. Within the Call box, search for the User required
3. Right click on the User required and select Get Info

Please note that you will only be able to amend your own details. Select OK to save any changes, if relevant.

Otherwise, select Close or Cancel to close the window.



The 'User Details' dialog box displays the following information for user 'Mark Tistut':


Name	Mark Tistut
Description	Sales
Telephone	2002
Mobile	07711278699
Home	
Spare1	07322921553
Spare2	
email	mark@splicecom.com
Company	
Web	

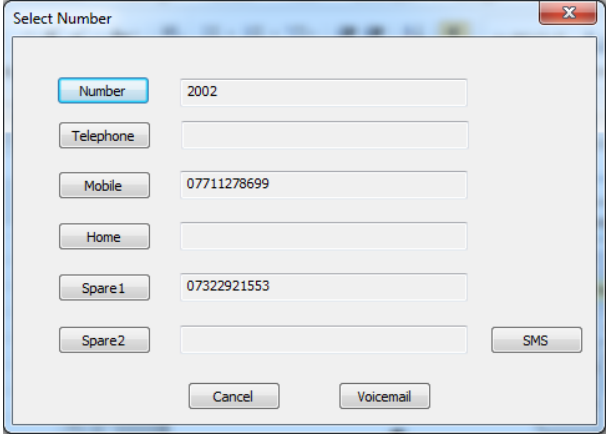
Buttons: OK, Cancel

Make a call to a User's personal numbers

You can enter and store your mobile number, home number and two spare numbers in your User account, please refer to the Personal Numbers section from page 47 for further details. Your colleagues can do the same. If you wish to dial your colleagues on any of these numbers you can search for their entry within the Directory and click on the number within the Directory window as explained in the Make a call to a User section from page 23.

Alternatively, you can use the following method to dial a colleague's personal numbers:

1. Firstly, ensure the Users filter  is turned on
2. Within the Call box, search for the User required
3. Right click on the User required and select Choose Number to Dial
4. The Select Number dialogue box will appear displaying the numbers stored with this User
5. If you wish to dial the Mobile number click on the Mobile button or if you wish to dial the Home number click on the Home button, and so on.



The 'Select Number' dialog box displays the following information for user 'Mark Tistut':

Number	2002
Telephone	
Mobile	07711278699
Home	
Spare1	07322921553
Spare2	

Buttons: Cancel, Voicemail, SMS

This method can also be used to transfer a call to a User's personal numbers.

Departments

Departments are a feature of the **maximiser** system that allows calls to be routed efficiently to a group of Users by dialling one number either internally or externally.

The following describes the usage of Navigate when Departments are used on your **maximiser** system.

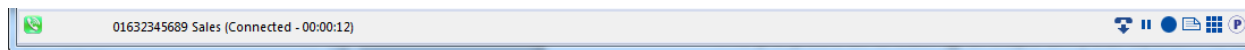
Working as a member of a Department

Due to your role in your company you may have been placed in a Group on the **maximiser** system. For example, if you are part of a Sales team you may be placed in a Sales Group, or part of a Reception team or part of a Support team you may have been placed in a Group. The purpose of creating Groups on your system is to ensure the efficient handling of incoming calls. For example, you may wish to ensure all incoming calls to Reception are shared among several colleagues to ensure the calls are answered quickly, or you may wish to ensure that support calls are shared equally among the Support team.

A Department determines the routing of a call to your Group and your System Administrator will inform you if you will be receiving Department calls and how that Department is configured.

Receiving a Department Call

When you receive a call for a Department, instead of your details being displayed within Call Status, the Department name is displayed. This allows you to determine, before answering the call, whether you are receiving a personal or Department call and allows you to answer the call in the correct manner.



If you wish to distinguish a Department call from a personal call by using a different ring tune please refer to the Ring Tunes section from page 55 for further information.

Wrap Up Time

A Department can be configured with a Wrap Up time whereby at the end of each call received for the Department you will not receive any further calls until this time has expired. The purpose of this feature is to give you time to complete any administrative tasks, such as completing a contact report, updating a database, and so on.

You can truncate this Wrap Up time by lifting and replacing your handset (partner mode only).

Please note that if you are an Agent within a Vision call centre, Completion Codes, if configured, will be displayed during the Wrap Up time. Please refer to the Using Navigate as a Vision Call Centre Agent section from page 69 for further details.

Please refer to your System Administrator for further information.


Make a call to a Department

You may wish to talk to any available member of, for example, the Personnel department or Support team. Rather than ringing one member of that department only to find they are not available and then having to

ring another extension, etc. you could ring the relevant Department, if set up. Your call will be answered by any available member of this Department saving you time.



1. In the Call box enter the extension number of the Department you wish to dial
2. Press Enter and the call will be made
3. Your call will be answered by an available member of that team.

Alternatively, you can use the Directory:


1. Select the Departments filter icon , if not already selected.
2. Type in the name of the Department you wish to dial. As you starting typing the list of the records matching the text you have entered will be displayed.
3. When the record you require is displayed click on the Telephone Number,
or
Double click on the Name, and the call will be made.

Please note that you can enter an asterisk (*) in to the Call box to view all the records in one list (dependent on the Directory Filter icons selected).

Transfer a call to a Department

1. Place the call on hold by selecting the Hold icon 
2. In the Call box enter the extension number of the Department to be dialled.
3. Press Enter and the call will be made
4. Wait for the call to be answered and announce the caller
5. To transfer the original call, select the Transfer icon . You will no longer have control of the call.

Alternatively, you can use the Directory:

1. Select the Departments filter icon , if not already selected.
2. In the Call box enter the name of the Department to be dialled
3. As you starting typing the list of the records matching the text you have entered will be displayed.
4. When the record you require is displayed,
Click on the Telephone Number
or
Double click on the Name
6. Wait for the call to be answered and announce the caller
7. To transfer the original call, select the Transfer icon. You will no longer have control of the call.

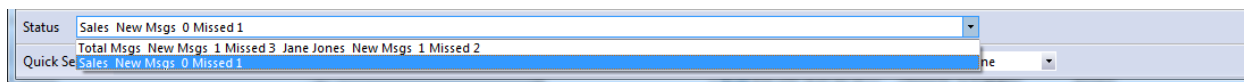
Please note that if you wish to continue talking to the caller while using the Directory ignore step 1. The caller will be put on hold once you make the call in step 4.

For further information on transferring a call please refer to page 9.

Calls History


The Calls History window can also display the incoming answered and missed calls received for a Department. Your System Administrator can configure this facility for you, if not already available. This facility will also give you access to voicemail messages for the Department, please refer to the Voicemail section from page 59 for further information.

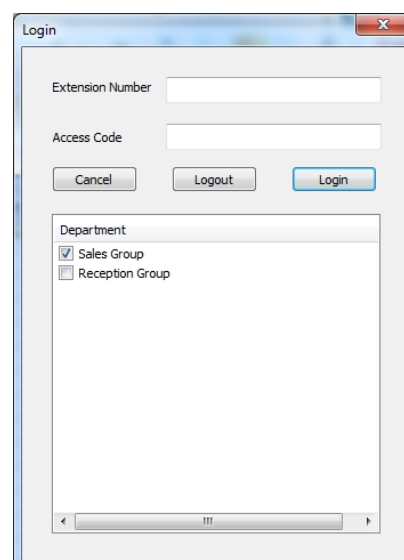
If this facility has been configured for you, the Status Bar will also indicate how many missed calls the Department has received, together with the number of new voicemail messages. Click on the list box arrow to the right of the Status Bar to view this information for the relevant Department.



Log in or out of a Group



As member of a Group there may be situations when you wish to temporarily remove yourself from the Group so that you do not receive Department calls. For example, you may wish to log yourself out of the Accounts group when you are working on a particular project and are not to receive general calls, or you may wish to have the ability to log yourself into the Reception group when cover is required. This feature must have been previously set up for you on the system, please refer to your System Administrator for further details.

1. Select the Login icon 
2. The Groups that you are able to log in or out of are listed in the Login dialogue box
3. Remove the tick to log out of a Group
or
Add a tick to log in to a Group.
4. Choose Close or Cancel to close the dialogue box.





Contacts

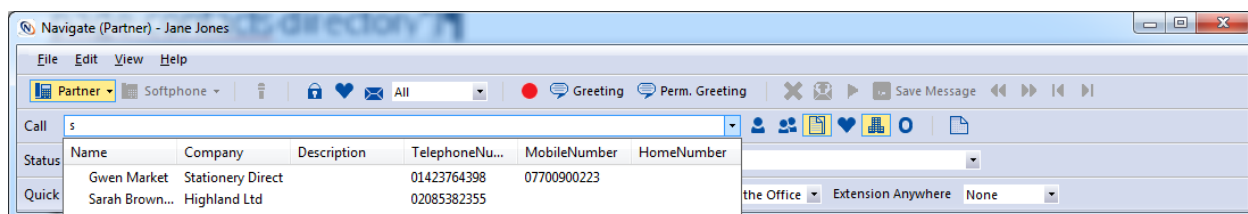
A database of external Contacts such as customers, suppliers, etc can be stored on the **maximiser** system. Your system administrator is responsible for the maintenance of this database. The purpose of the Contacts database is to match the incoming number of an external call and to display the name of the caller in Call Status if a match is found, and to enable you to make external calls to regular contacts quickly and easily.

The Directory within Navigate provides access to this database of contact information by selecting the Contacts filter icon  or Company filter icon .

- **Contacts Filter** will display the list of external contacts entered on your telephone system. The search will be made within the Name column.
- **Company Filter** will display the list of external contacts entered on your telephone system. The search will be made within the Company column.

View the Contacts Directory

1. Firstly, ensure the Contacts filter  and/or Company filter  is turned on
2. In the Call box enter the name or number of the Contact or Company you wish to view
3. As you starting typing the list of the records matching the text you have entered will be displayed.

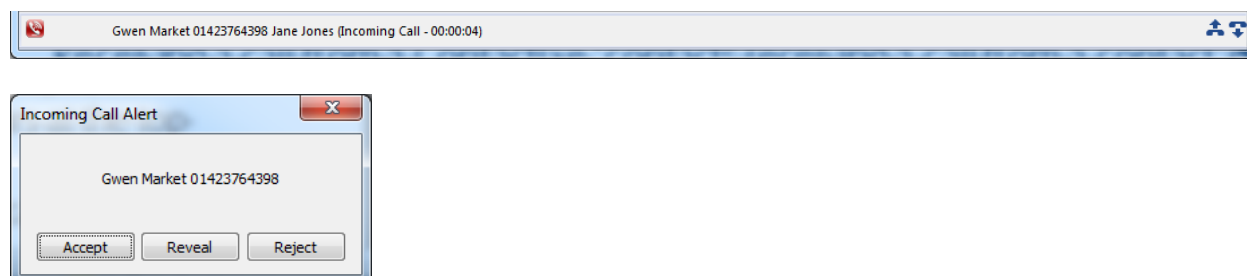


You can enter an asterisk (*) in to the Call box to view all the records in one list (dependent on the Directory Filter icons selected).



Name	Company	Description	TelephoneNumber	MobileNum
April Brown	Epson		02082938837	07829838384
Gwen Market	Stationery Direct		01423764398	07700900223
Jane Brown	Maxwell Jones	Solicitor	01538253838	07890215598
John Partridge	Marketing Assoc	Exhibition material	01837929218	07898383832
Mark Hogg	Normans Direct	Stationery	02088269156	07890543112
Mike Harrison	Richmond Photocopiers	Photocopier Support	01483283983	07930532828
Richard Inspire	Dell	Sales	02083838389	07890621977
Sarah Brownsell	Highland Ltd		02085382355	
Sarah Patel	Accounting Plus	Accountant	02077129792	07890772392

Receiving a call from a Contact

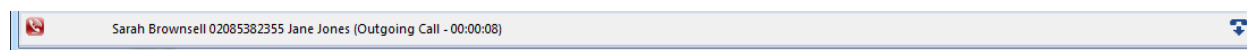
If the incoming number of an external call is matched within the Contacts database the name of the caller will be displayed within Call Status and Incoming Call Alert enabling you identify the call and answer the call in the appropriate manner.






Make a call to a Contact

1. Firstly, ensure the Contacts filter  and/or Company filter  is turned on
2. In the Call box enter the name or number of the Contact or Company to be dialled.
3. As you starting typing the list of the records matching the text you have entered will be displayed.
4. When you entry you require is displayed,
Click on the number you wish to dial, and the call will be made.
or
Double click on the Name, and the number displayed in the Telephone Number column will be used.

Call Status will display the name and number of the Contact being dialled.



Transfer a call to a Contact

1. Place the call on hold by selecting the Hold icon 
2. Ensure the Contacts filter  and/or Company filter  is turned on
3. In the Call box enter the name or number of the Contact or Company to be dialled.
4. When the entry you require is displayed,
Click on the number you wish to dial, and the call will be made
or
Double click on the Name, and the number displayed in the Telephone Number column will be used.
5. Wait for the call to be answered and announce the caller
6. To transfer the original call, select the Transfer icon. You will no longer have control of the call.



Please note that if you wish to continue talking to the caller while using the Directory ignore step 1. The caller will be put on hold once you make the call in step 4.

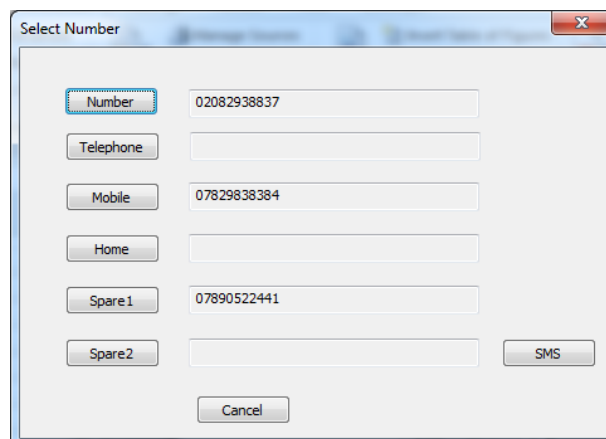
For further information on transferring a call please refer to page 9.

Make a call to a Contact's alternative numbers

Up to 5 telephone numbers can be stored for each Contact - the main Telephone Number, Mobile Number, Home Number, and two Spare numbers. If you wish to dial a Contact on any of these numbers you can search for their entry within the Directory and click on the number within the Directory window as explained in the Make a call to a Contact section from page 30.

Alternatively, you can use the following method to dial one of the numbers store for a Contact:

1. Firstly, ensure the Contacts filter  and/or Company filter  is turned on
2. Within the Call box, search for the Contact required
3. Right click on the Contact required and select Choose Number to Dial
4. The Select Number dialogue box will appear displaying the numbers stored with this Contact
5. If you wish to dial the Mobile number click on the Mobile button or if you wish to dial the Home number click on the Home button, and so on.




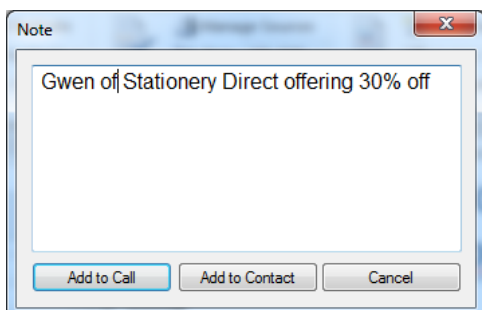
The 'Select Number' dialog box displays a list of stored numbers for a contact. It includes buttons for 'Number', 'Telephone', 'Mobile', 'Home', 'Spare1', and 'Spare2'. The 'Number' field is currently selected and shows '02082938837'. The 'Mobile' field shows '07829838384'. The 'Home' field is empty. The 'Spare1' field shows '07890522441'. The 'Spare2' field is empty. There are 'SMS' and 'Cancel' buttons at the bottom right.

This method can also be used to transfer a call to a User's personal numbers.

Add a note to a Contact during a Call

During a call you may wish to make notes about the call, for example, the caller's name, the details of his enquiry, etc. This information not only acts as a reminder for you but will also be passed to another User of Navigate, PCS 60 and PCS 58x/57x/56x when the call is transferred. If the call has been made to or received from a Contact these notes can be stored permanently on the database for future reference, as follows:

1. During a call click on the Add Note icon , from the Call Status pane
2. Enter any text in the Note box
3. Select Add to Contact

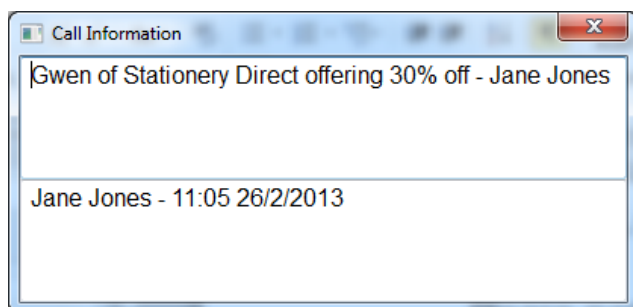


The 'Note' dialog box contains a text area with the text 'Gwen of Stationery Direct offering 30% off'. At the bottom, there are three buttons: 'Add to Call', 'Add to Contact', and 'Cancel'.

The text will be stored permanently with the Contact on the database and will be displayed whenever a call is received by or made to this Contact so that you are fully aware of previous conversations with this customer, for example.

Please note that if you select the Add to Call button the text will disappear once the call has ended and will not be stored. For further information please refer to the Add a note to a call section from page 11.

This Note can be viewed in the Call Information window (from the View menu select Call Information). The text together with your name as the originator of the note and the date and time will be displayed. This information will be passed on with the call if it is transferred.

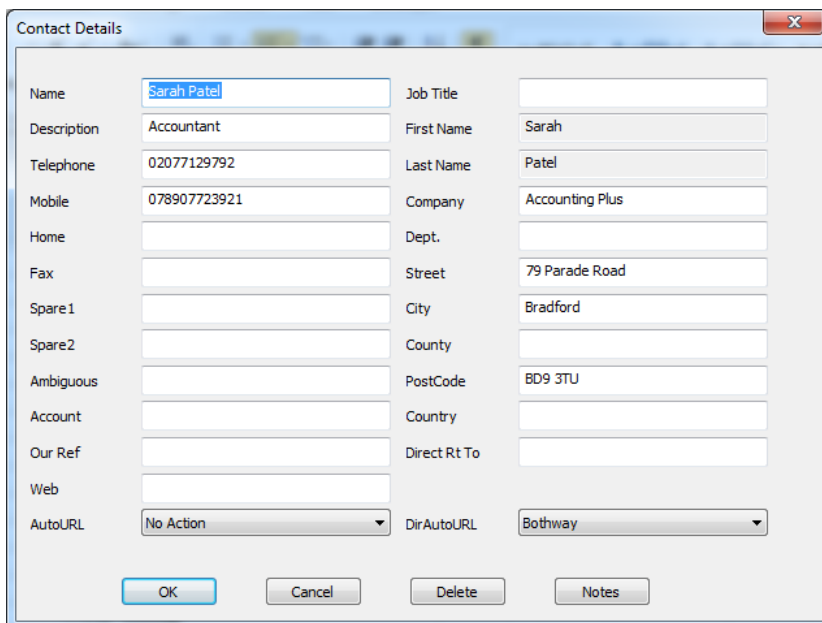


The Call Information window will also display Notes added by a colleague when they are transferring a call to you, for example.

Viewing Contact Details

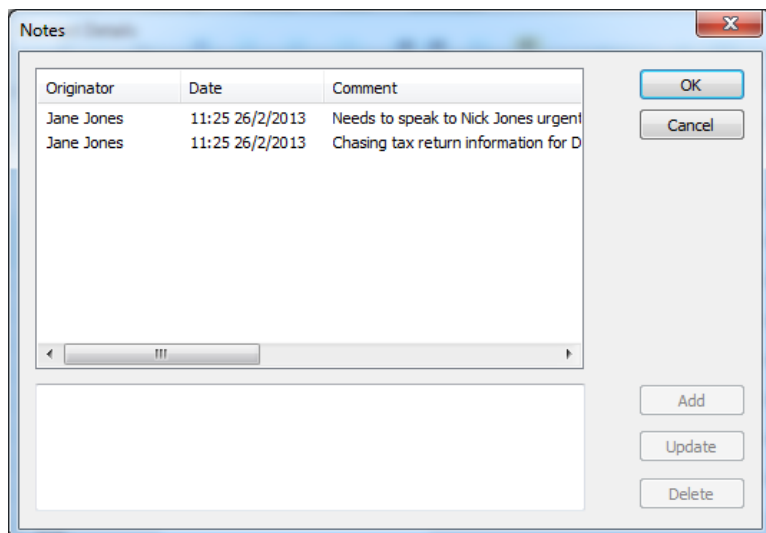
All information, for example, the address, telephone numbers etc, stored on the database for a particular Contact can be viewed.

1. Within the Call box, search for the Contact to be viewed.
2. Right click on the entry and select Get Info
3. The Contact Details dialog box will be displayed for the selected Contact
4. Select Cancel to exit.



View a Note

If you wish to view the notes stored for this Contact select the Notes button. Select Cancel or Close to return to the Contact Details form.



Amend a Contact's details

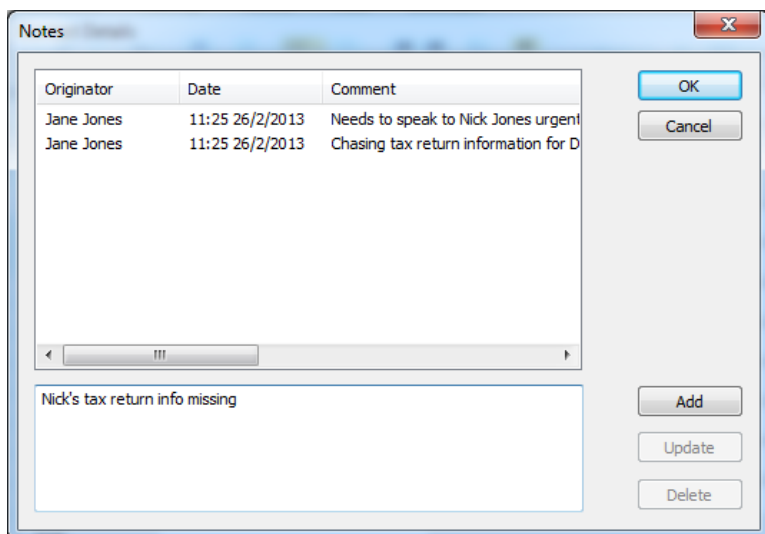
Please note that you will only be able to make a change to the details stored for a Contact if given the required permission. Please refer to your system administrator for further information.

1. Within the Call box, search for the Contact to be amended.
2. Right click on the entry and select Get Info
3. The Contact Details dialog box will be displayed for the selected Contact
4. Make the changes required
5. Select OK to save the changes.

Add a Note

If you wish to add a note to the Contact while viewing the Contact Details click on the Notes button.

1. Click within the text box at the bottom
2. Enter the text required
3. Select the Add button
4. The new entry will be listed above.
5. Select the OK button when finished



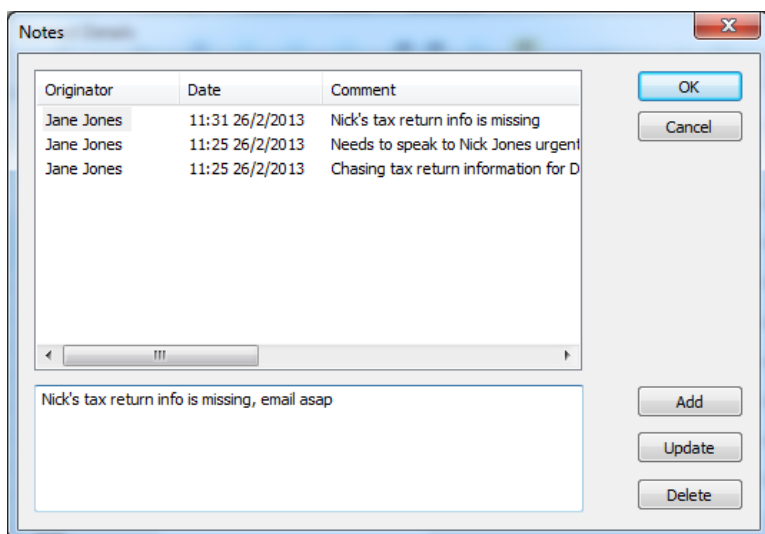
The Notes dialog box contains a table with the following data:

Originator	Date	Comment
Jane Jones	11:25 26/2/2013	Needs to speak to Nick Jones urgent
Jane Jones	11:25 26/2/2013	Chasing tax return information for D

Below the table is a text area containing the text: "Nick's tax return info missing". To the right of the table and text area are buttons for "OK", "Cancel", "Add", "Update", and "Delete".

Amend a Note

1. Select the Note to be amended, by clicking on the Originator's name
2. Click within the text box at the bottom
3. Make the changes required
4. Click on the Update button when ready
5. Select the OK button when finished



The Notes dialog box shows the same table as before, but the first row is highlighted. The text area now contains the amended text: "Nick's tax return info is missing, email asap". The "Update" button is visible.

Delete a Note

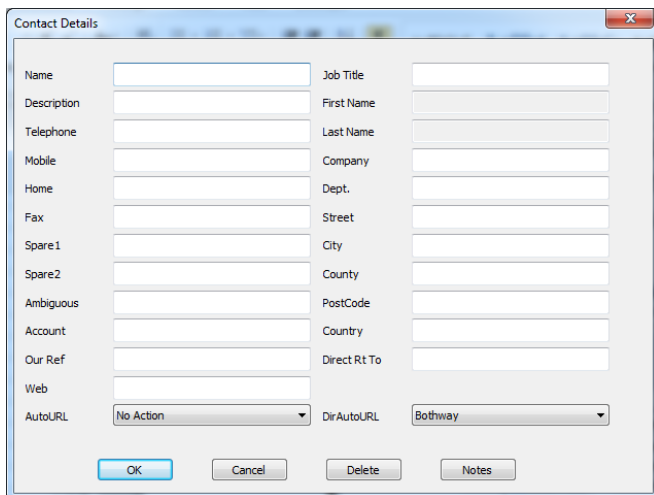
1. Select the Note to be deleted, by clicking on the Originator's name
2. Click on the Delete button
3. Select the OK button when finished

Create a new Contact

Please note that you will only be able to add a new Contact to the database if given the required permission. Please refer to your system administrator for further information. A new Contact will be saved

in the centralised database and therefore will be available to all your colleagues also using Navigate, PCS 60 or PCS 56x or 57x or 58x

1. Right click on an entry within the directory and select Add Contact
2. The Contact Details form will be displayed. Enter all the information required.
3. If you wish to add notes to this Contact select the Note button and enter the text required and select OK.
4. When ready, select OK to save the new Contact.



The screenshot shows a 'Contact Details' dialog box with the following fields:

Name	Job Title
Description	First Name
Telephone	Last Name
Mobile	Company
Home	Dept.
Fax	Street
Spare1	City
Spare2	County
Ambiguous	PostCode
Account	Country
Our Ref	Direct Rt To
Web	
AutoURL	DirAutoURL

At the bottom, there are four buttons: OK, Cancel, Delete, and Notes.

Create a new Contact from Calls History

If you have received a call from or made a call to an external number this call will be listed in your Calls History. The number listed can be used to create a new Contact record by right clicking on the required entry and then selecting Add Contact. The number displayed will be automatically entered into the Telephone number field of the Contact Details form and further information can be added.

Please refer to the Viewing your Calls History section from page 18 for further details.

Using the Auto URL and Dir Auto URL fields

A Contact can be configured so that a web page relevant to that Contact is available when a call is received from and/or made to this Contact when a colleagues is using a PCS 60 or PCS 58x. This facility can be used to view websites available via the Internet or stored on your company's Intranet or on the telephone system's internal web server to provide your colleagues with information to help them deal with a call to or from the Contact.

1. In the Web field enter the address to the web page required, eg www.splicecom.com
2. From the AutoURL list box select:
 - No Action – the web page will be displayed when requested by the User, or
 - Show Info on Ring – the web page will be displayed when a call is made to and/or received by this Contact, or
 - Show Info on Connect – the web page will be displayed once a call to and/or from this Contact has been answered.
3. From the DirAutoURL list box select:
 - Both Way – the web page will be displayed when a call is made to this Contact and when a call is received from this Contact, or

- Incoming – the web page will only be displayed when a call is received from this Contact, or
- Outgoing – the web page will only be displayed when a call is made to this Contact

Please refer to your system administrator for further assistance when configuring this facility.

For details on using the Direct Rt To field please refer to your system administrator.

Delete a Contact

Please note that you will only be able to delete a Contact if given the required permission. Please refer to your system administrator for further information. The Contact will be deleted from the centralised database and therefore will no longer be available to your colleagues.

1. Within the Call box, search for the Contact to be amended.
2. Right click on the entry to be deleted and select Get Info
3. Select the Delete button.
4. The contact will be deleted from the centralised Contacts database on your telephone system.

Using an Ambiguous Number

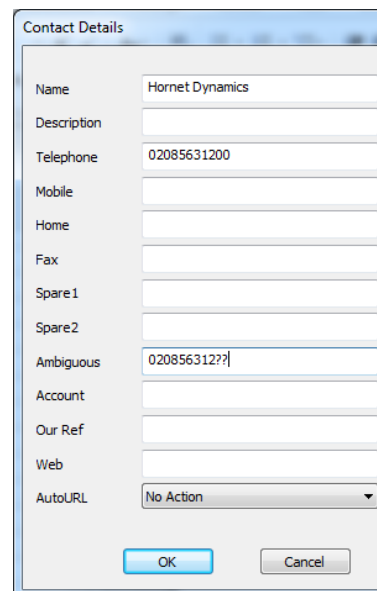
When a company has a large DDI number range a Contact can be created that will match any incoming call from this company so that you and your colleagues are always aware when a call is received from this company.

A question mark (?) is used to specify the part of the telephone number that will vary, eg an entry of 01256387??? will match a call from 01256387385, 01256387370, 01256387291 etc.

1. Create a new Contact or open the Contact Details for the Contact to be amended.
2. In the Ambiguous field enter the number required using a ? where a digit will be variable.
3. Select OK to save the changes.

Please note:

- Contacts containing a complete match to the incoming number will take priority over an ambiguous number.
- You will only be able to add or amend a Contact if given the required permission. Please refer to your system administrator for further information.




The image shows a 'Contact Details' dialog box with the following fields: Name (Hornet Dynamics), Description, Telephone (02085631200), Mobile, Home, Fax, Spare1, Spare2, Ambiguous (020856312??), Account, Our Ref, Web, and AutoURL (No Action). The 'Ambiguous' field is highlighted with a blue border. At the bottom are 'OK' and 'Cancel' buttons.


Integration with your Outlook Contacts

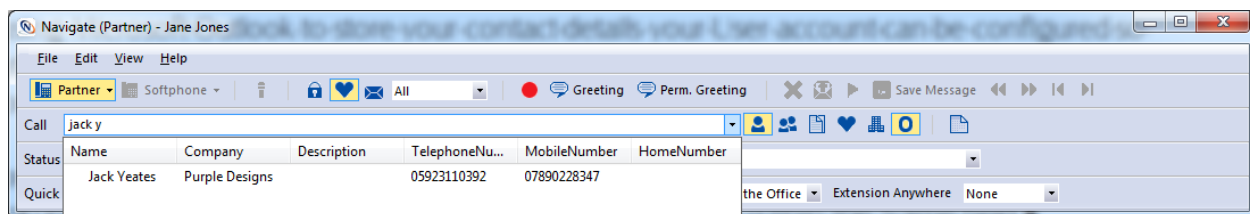
If you are using Microsoft Outlook to store your own contact details your User account can be configured to enable you to use the Outlook Contacts Lookup feature which will allow you to dial these number via

Navigate. Please note that this feature must be previous configured on your User account, please refer to your system administrator for further details.

Select the Enable Outlook Contact Lookup icon , on the right hand side of the Call bar, to enable the Directory to search within your Outlook Contacts. Please note that the search will only be made within the Name field.

Make a call to an entry within your Outlook Contacts

1. Firstly, ensure the Enable Outlook Contact Lookup icon  is turned on
2. In the Call box enter the name or number of the Outlook Contact you wish to dial
3. As you starting typing the list of the records matching the text you have entered will be displayed.



4. When the entry you require is displayed,
Click on the number you wish to dial, and the call will be made.
or
Double click on the Name, and the number displayed in the Telephone Number column will be used.

Call Status will display the name and number of the Contact being dialled.

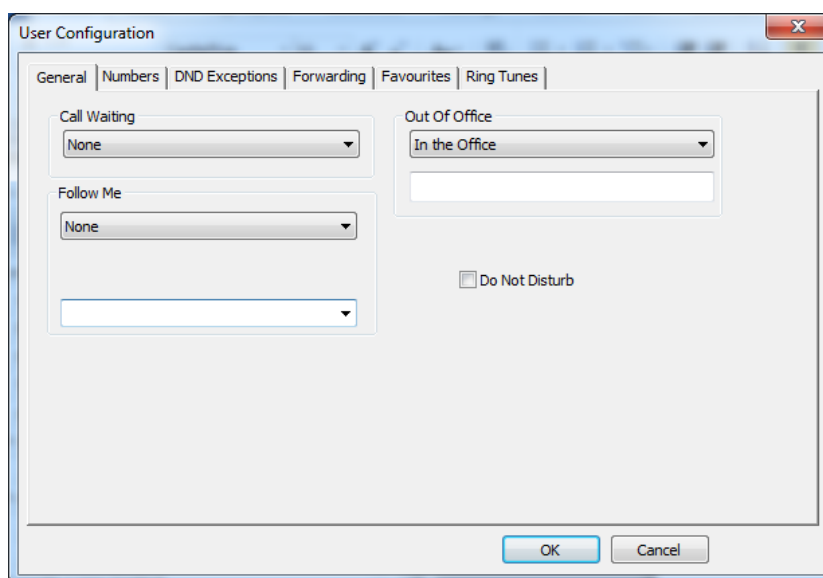
Please note that if you right click on an entry from your Outlook contacts:

- The Add Contact and Get Info options will open a blank Contact Details form and save this new entry in the Contact database stored centrally on your telephone system.
- The Add to Favourites option will create a Favourite using the Contact Name and Telephone Number displayed in the directory.
- The Choose Number to Dial option will display the numbers stored for the entry in your Outlook Contacts. You can dial these numbers by clicking on the button beside the number you wish to dial.

User Configuration

The **maximiser** system gives you the ability to configure features such as call waiting, forwarding, do not disturb, speed dials and ring tunes on your extension. Navigate enables you to configure these facilities via an easy to use dialog box or via the Quick Settings Bar. Please note that these settings are stored in your User account and therefore will travel with you when you log on to another handset or PC running Navigate.

The User Configuration form can be accessed by selecting Settings from the Edit menu.



Please note:

- If the User Configuration dialogue box does not appear when you select Settings from the Edit menu you have not been given the access required to change your configuration options.
- If the Favourites tab and Ring Tunes tab are the only tabs that appear in your User Configuration form you have been given restricted access to this dialogue box.
- If the Quick Settings Bar is not displayed within Navigate you have not been given the access required to change your configuration options via this bar.

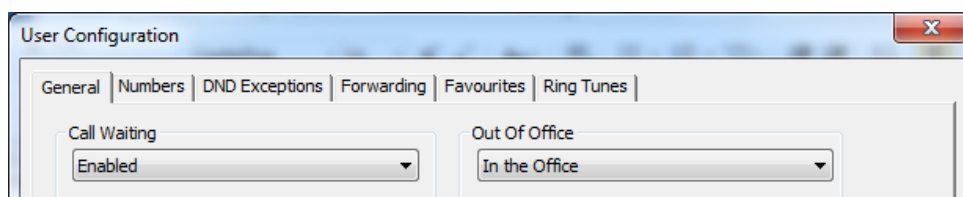
Please refer to your System Administrator for further information.

Call Waiting

The Call Waiting feature allows you to receive a second call while connected to another call.

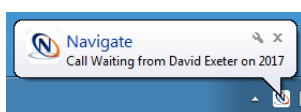
Turn on Call Waiting

1. From the Edit menu select Settings
2. Select the General tab
3. From the Call Waiting list box select Enabled
4. Select OK or Save.





Handling a waiting call

1. When a second call is received you will hear an intermittent beep via your telephone handset (partner mode) or Navigate software, and the Call Waiting message will appear from the Navigate icon within the Notification Area. This message will disappear after a few seconds or alternatively click on the message.







2. Call Status will also display the details of the second call waiting to be answered.






3. To answer the second call click on the call within Call Status. The first call will be placed on hold.
4. The second call will ring on your extension, click on the Answer icon or press **Enter**
 - or
 - Hang up the call – select Hang up icon  (the call will be automatically passed to your Forward on Busy number (if set) or to voicemail (if enabled))
 - or
 - Send the call to voicemail – select Send to VM 


Alternatively,

1. Select the Switch  icon and the first call will be placed on hold.
2. The second call will ring on your extension, click on this call in Call Status
3. Select the Answer icon  or press **Enter**
 - or
 - Hang up the call – select Hang up icon  (the call will be automatically passed to your Forward on Busy number (if set) or to voicemail (if enabled))
 - or
 - Send the call to voicemail – select Send to VM 

When you have two calls active on your phone you can:-

- Use the Switch  icon to toggle between the two calls.
- Select the Conference  icon to create a 3-way conference between yourself and the two calls. (For further information on conference calls please refer to page 14.)
- Use the Hang Up icon  to end the call you are currently connected to.

If you choose to ignore a call waiting on your phone the call will be automatically passed to your Forward on No Answer number (if set) or to voicemail (if enabled), otherwise the call will continue to ring on your extension.

If you select the Switch icon  and choose not to answer the call waiting the caller will be automatically passed to your Forward on No Answer number (if set) or to voicemail (if enabled) and you will be returned to your previous call.

Turn off the Intermittent Beep

When the Call Waiting feature is enabled you may not wish to hear the intermittent beep when a second call is received and may wish to be informed visually via Navigate only. This tone can be turned off as follows:

1. From the Edit menu select Settings
2. Select the General tab
3. From the Call Waiting list box select No Tone
4. Select OK or Save.

When the No Tone option is turned on and a second call is received the Call Waiting message will appear on the screen, the call will be displayed in Call Status and the Switch icon will become available. Handle the call as described above.

Turn off the Intermittent Beep in the headset only (Partner mode only)

If you do not wish to hear the beep in your headset but wish to hear the beep via Navigate, ie via your PC. This feature can be set as follows:

1. From the Edit menu select Settings
2. Select the General tab
3. From the Call Waiting list box select Phone Tools
4. Select OK or Save.

Please note: your PC must have a sound card and speakers in order for you to hear the intermittent beep.

Turn off Call Waiting

1. From the Edit menu select Settings
2. Select the General tab
3. From the Call Waiting list box select None
4. Select OK or Save.

Call Forwarding

The Call Forwarding facility enables you to forward calls to a colleague or to your mobile, for example, when you are out of the office, not at your desk or on another call to ensure your callers can reach you wherever you are or to ensure your calls are dealt with by another member of staff.

Please note:

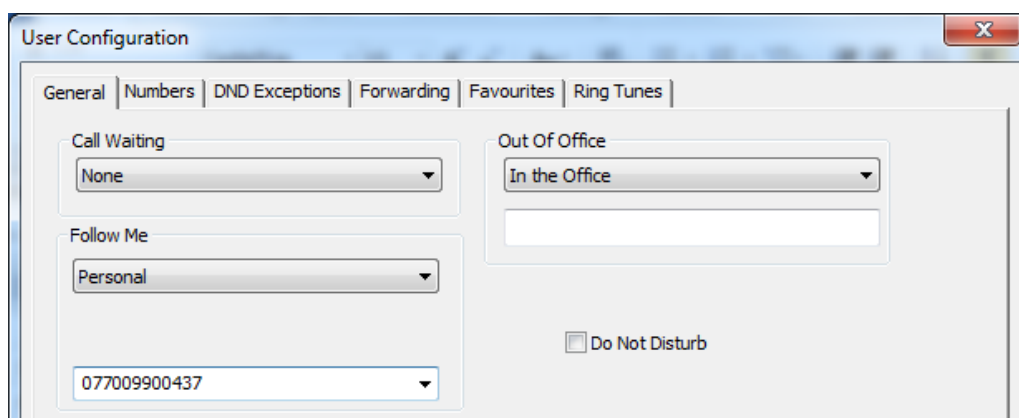
- Partner mode - When Follow Me or Forwarding has been set your handset will provide a broken dial tone to remind you that this feature has been enabled.
- If your calls are forwarded to an internal extension and that extension is not answered or busy the caller will be passed to your voicemail and the call will be logged as a missed call on your extension.

Using Follow Me

This facility allows you to configure your extension so that your calls follow you to an internal extension or to an external number so that when you are, for example, working at another desk, working at home, or using your mobile etc, your calls will still reach you. You could also use this feature when you are, for example, on holiday and wish all your calls to be diverted to your assistant or another colleague.

Turn on Follow Me

1. From the Edit menu select Settings
2. Select the General tab
3. From the Follow Me list box select one of the following:
 - Personal – all calls to your extension and direct line number will be forwarded
 - Dual Personal – all calls to your extension and direct line number will be forwarded, however your extension will also ring. This will ensure that you can pick up the call wherever you are.
 - All – all calls to your extension, direct line number and any Department calls will be forwarded
 - Dual All – All calls to your extension, direct line number and any Department calls will be forwarded, however your extension will also ring. This will ensure that you can pick up the call wherever you are.
4. In the Follow Me Number field enter the internal or external number to which calls are to be forwarded.
5. Select OK or Save.



The Dual Personal and Dual All options are useful if you are in role where you are constantly moving away from your desk. You could set your Follow Me to your mobile, for example, so that you can answer calls wherever you are, and when you are back at your desk you do not need to turn off Follow Me to answer the calls at your desk. When you have these options set you can set a different ring tune to play on your handset (partner mode) or PC to remind yourself that this feature has been set. Please refer to the Ring Tunes section from page 55 for further details.

Turn off Follow Me

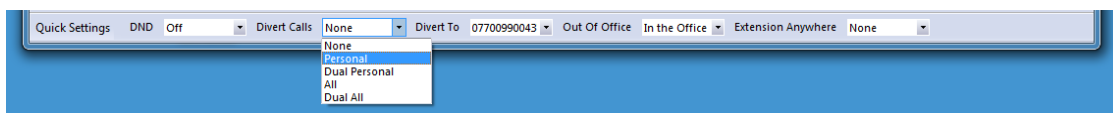
1. From the Edit menu select Settings
2. Select the General tab
3. From the Follow Me list box select None
4. Select OK or Save

You do not need to remove the Follow Number as you may wish to use this number again.

Quick Settings Bar

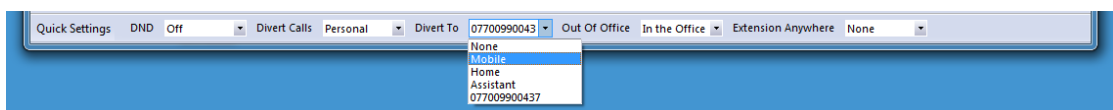
Once a Follow Me number has been entered, the Follow Me facility can be turned on and off via the Quick Settings Bar.

1. From the Divert Calls list box select either Personal, Dual Personal, All, Dual All or None.



If your home, mobile or assistant telephone numbers have been entered in your User account (please refer to page 47 for further details) you can set your Follow Me facility to one of these numbers via the Quick Settings Bar.

1. From the Divert Calls list box select either Personal, Dual Personal, All, or Dual All.
2. From the Divert To list box select Mobile, Home or Assistant.

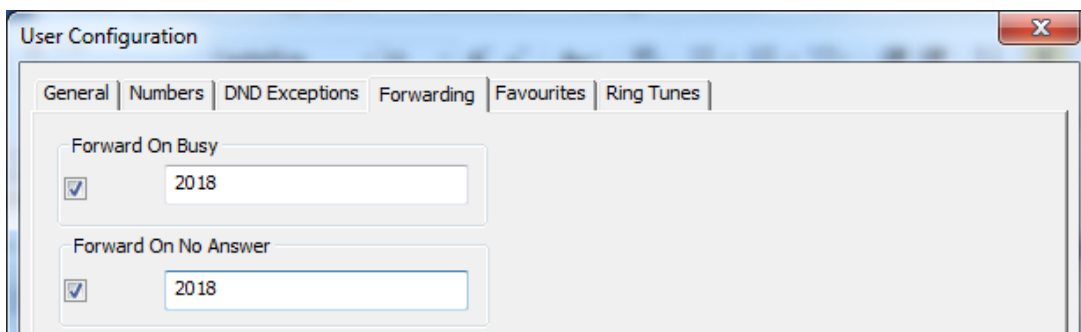


Forward on Busy

The Forward on Busy feature will redirect your calls to either an internal or external number when you are on an existing call or have Do Not Disturb set. This is useful if you wish to ensure your calls are answered by your assistant or another member of your team.

The feature can be turned on as follows:

1. From the Edit menu select Settings
2. Select the Forwarding tab
3. Select the Forward on Busy tick box
4. In the Forward on Busy number field enter the internal or external number to which calls are to be forwarded.
5. Select OK or Save



To turn off this feature un-tick the Forward On Busy tick box

Forward on No Answer

The Forward on No Answer feature will redirect your calls to either an internal or external number when you do not answer your extension. This is useful if you wish to ensure your calls are answered by your assistant or another member of your team or redirected to your mobile when you are temporarily away from your desk.

The feature can be turned on as follows:

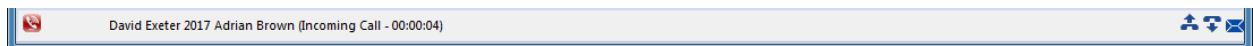
1. From the Edit menu select Settings
2. Select the Forwarding tab
3. Select the Forward on No Answer tick box
4. In the Forward on No Answer number field enter the internal or external number to which calls are to be forwarded.
5. Select OK or Save

To turn off this feature un-tick the Forward On Busy tick box

By default, your extension will ring for 20 seconds before your extension is considered not answered. Your System Administrator will be able to tell you if this default setting has been changed.

Receiving a Forwarded Call

When a colleague's calls have been forwarded to your extension your colleague's details will be displayed in Call Status. This information will enable you to identify and answer a forwarded call correctly.

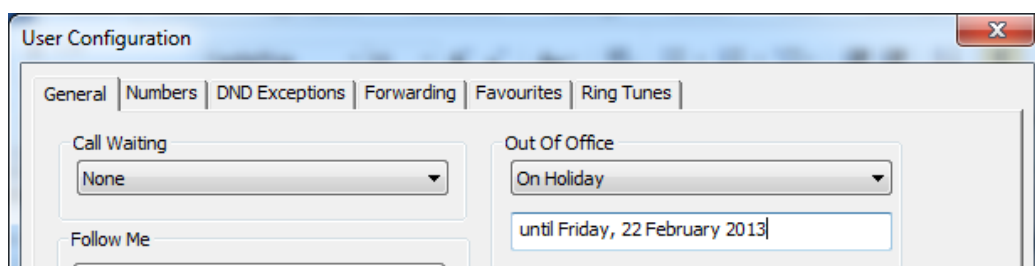


Out of Office Message

When you are unable to answer your phone you may wish to inform your colleagues of your whereabouts and when you will be available. An Out of Office Message can be configured and this will be displayed on your colleagues' Navigate, PCS 60, PCS 56x, 57x or 58x when they attempt to call you.

Setting an Out of Office Message

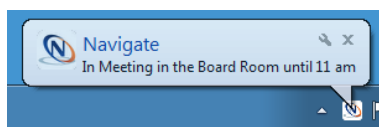
1. From the Edit menu select Settings
2. Select the General tab
3. From the Out of Office list box select In Meeting, At Lunch, On Holiday or Off Site
4. In the Out of Office text box enter the message that will accompany the above message eg "until Monday", "until 3 pm" etc
5. Select OK or Save



Please note that if voicemail is enabled on your User account, when you set an Out of Office message your voicemail greeting will also change. Your callers will be played the In Meeting greeting, the At Lunch greeting, the On Holiday greeting or the Off Site greeting depending on the Out of Office message selected. By default, this will be your Permanent Greeting as described in the Recording a Greeting section from page 63. However if you wish to record a specific greeting for each Out of Office message please refer to your System Administrator for further details.

Making a call to a colleague with an Out of Office message

When a call is made to a colleague who has an Out of Office message set this information will appear in the balloon displayed via Navigate icon within the Notification Area. This feature will not change the manner in which your call is handled.



Turn off the Out of Office message

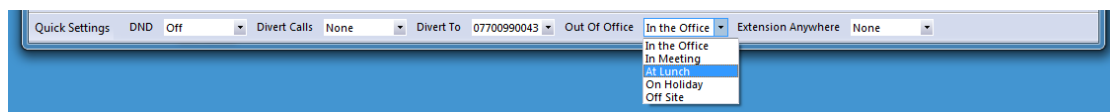
1. From the Edit menu select Settings
2. Select the General tab
3. From the Out of Office list box select In the Office
4. Select OK or Save

You can remove the message in the Out of Office text box or leave it if you want to use this same text again.

Quick Settings Bar


The Out of Office message can be turned on and off via the Quick Settings Bar.

1. From the Out of Office list box select In Meeting, At Lunch, On Holiday, Off Site, or In the Office to turn off this feature.



Integration with your Outlook Calendar

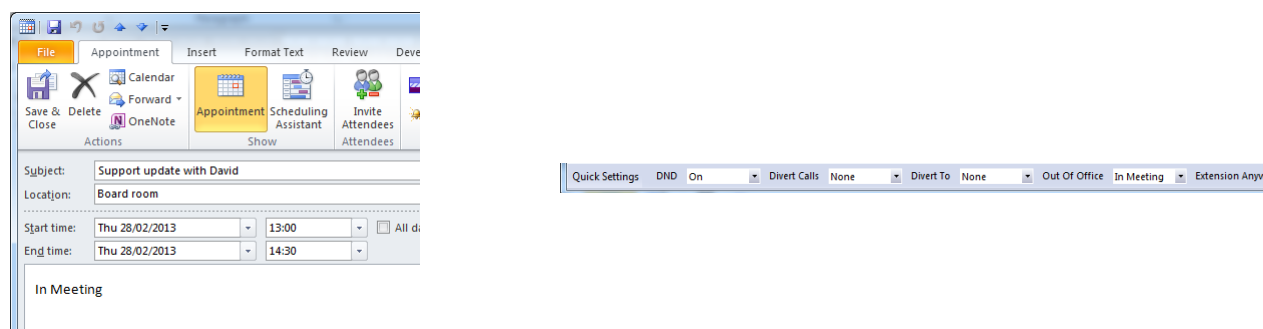
If you are using Microsoft Outlook as your calendar your User account can be configured to enable you to use the Outlook Calendar Lookup feature to set your Out of Office message. Please note that this feature must be previous configured on your User account, please refer to your system administrator for further details.

Select the Enable Outlook Calendar Lookup icon , on the right hand side of the Call Bar, to enable Navigate to use your Calendar.

In the relevant appointment in your Calendar enter one of the following Out of Office messages and at the appropriate time this message will be turned on within your User account.

In the Office
In Meeting
At Lunch
On Holiday
Off Site

These messages are case sensitive and must be the first words that appear in the body of the appointment.



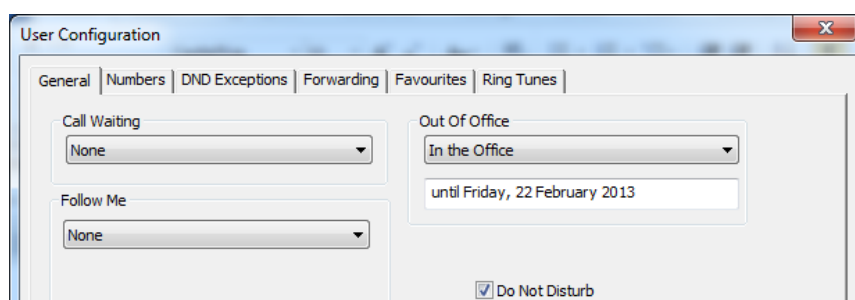
Your Out of Office message will return to In the Office at the End Time of your appointment.

Do Not Disturb

The Do Not Disturb facility allows you set your extension as permanently busy. This useful if, for example, you are holding a meeting in your office and do not wish to be disturbed.

Turn on Do Not Disturb

1. From the Edit menu select Settings
2. Select the General tab
3. Select the Do Not Disturb tick box
4. Select OK or Save



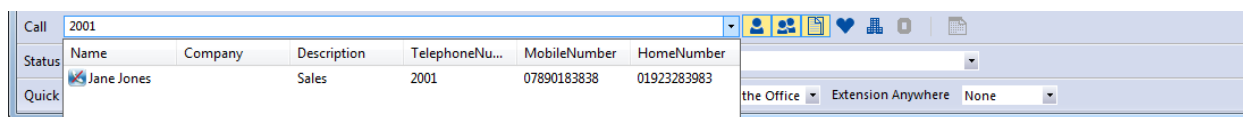
Your calls will be automatically passed to your Forward on Busy number, if configured, or to voicemail, if enabled, or cancelled. Calls will be logged in your Missed Calls list.

Your telephone handset will provide a broken dial tone to remind you that this feature has been enabled (partner mode only).

The Navigate icon on the Task Bar will display the Do Not Disturb icon to indicate that you have this feature enabled.



When a colleague uses the Users directory to find your entry the Do Not Disturb icon will be displayed beside your name to indicate that your extension has Do Not Disturb set.



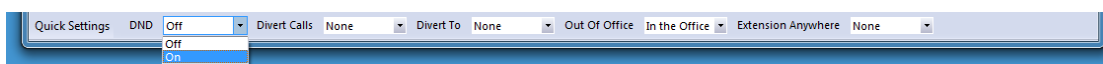
Turn off Do Not Disturb

1. From the Edit menu select Settings
2. Select the General tab
3. De-select the Do Not Disturb tick box
4. Select OK or Save

Quick Settings Bar

Do Not Disturb can be turned on and off via the Quick Settings Bar

1. From the DND list box select Off or On.

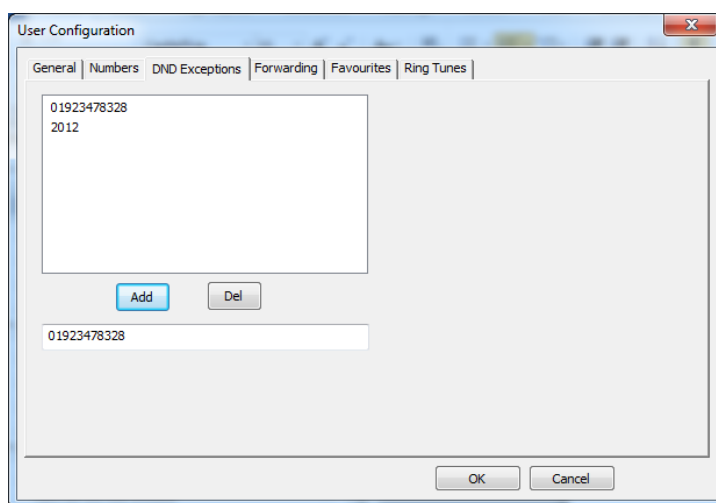


Do Not Disturb Exception Number

You may wish to turn on Do Not Disturb but still receive a call from a colleague or an external number. This is useful if you are expecting an urgent or important call but do not wish to be disturbed by other calls. The relevant number can be set as a Do Not Disturb exception as follows.

Entering a DND Exception Number

1. From the Edit menu select Settings
2. Select the DND Exceptions tab
3. In the DND Exception Number field (at the bottom) enter the internal or external number required
4. Select Add (the number will be displayed in the DND Exceptions list)
5. Select OK



Once a DND Exception number has been entered whenever you turn on Do Not Disturb you will still receive calls from this number. These numbers can stay in the list as long as required to be used each time you turn on Do Not Disturb.

Removing a DND Exception Number

1. From the Edit menu select Settings
2. Select the DND Exceptions tab
3. Select the number to be deleted
4. Select the Del button
5. Select OK

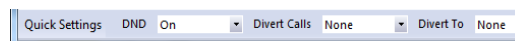
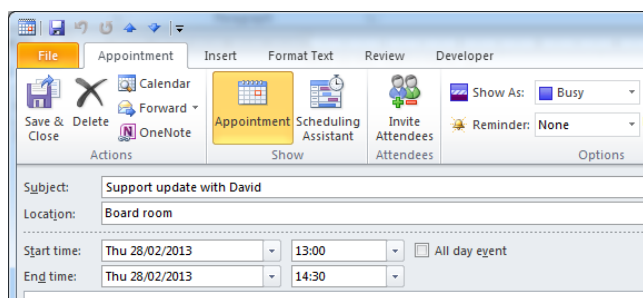
Integration with your Outlook Calendar

If you are using Microsoft Outlook as your calendar your User account can be configured to enable you to use the Outlook Calendar Lookup feature to enable and disable Do Not Disturb. Please note that this feature must be previously configured on your User account, please refer to your system administrator for further details.

Select the Outlook Calendar Lookup icon , on the right hand side of the Call Bar, to enable Navigate to use your Calendar.

When you have an appointment scheduled in your Calendar that is set as Busy or Out of Office, Do Not Disturb will be enabled on your User account.

If you have an appointment scheduled in your Calendar but do not wish DND to be enabled, ensure the appointment is set at Free or Tentative.



Do Not Disturb will be disabled at the End Time of your appointment.

Personal Numbers

Your home and mobile numbers, and two additional external numbers, can be entered on the central database, together with the internal or external number that you wish to use as your Assistant number.

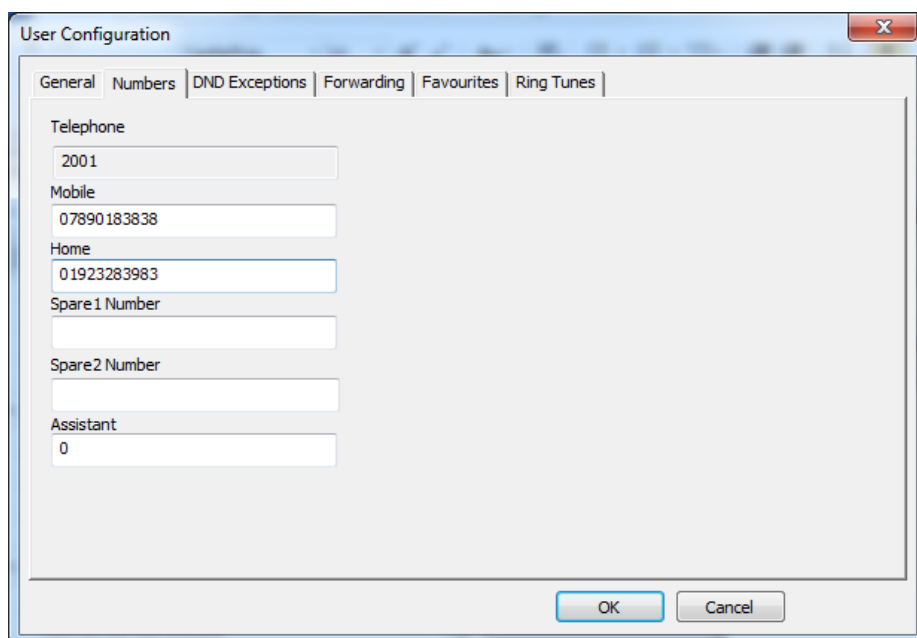
These numbers are used:

1. To identify you when you make a call from one of these telephone numbers. Your name and details will appear in Call Status.
2. By the Directory to enable a colleague to call you on one of these numbers

3. By voicemail:
 - a. when accessing your messages from your mobile or home phone (please refer to your System Administrator for further details),
 - b. your callers can be given the option to be transferred to your assistant number rather leave a message (please refer to the Using an Assistant telephone number section from page 64 for further details).
4. By the Follow Me facility (please refer to the Call Forwarding section from page 40 for further information).

Enter your personal numbers

1. From the Edit menu select Settings
2. Select the Numbers tab
3. In the Mobile, Home, Assistant, Spare 1 and/or Spare 2 Number fields enter the numbers required
4. Select OK



The image shows a 'User Configuration' dialog box with the 'Numbers' tab selected. The dialog has tabs for General, Numbers, DND Exceptions, Forwarding, Favourites, and Ring Tunes. Under the Numbers tab, there are input fields for Telephone (2001), Mobile (07890183838), Home (01923283983), Spare1 Number, Spare2 Number, and Assistant (0). The OK and Cancel buttons are at the bottom right.

Please note:

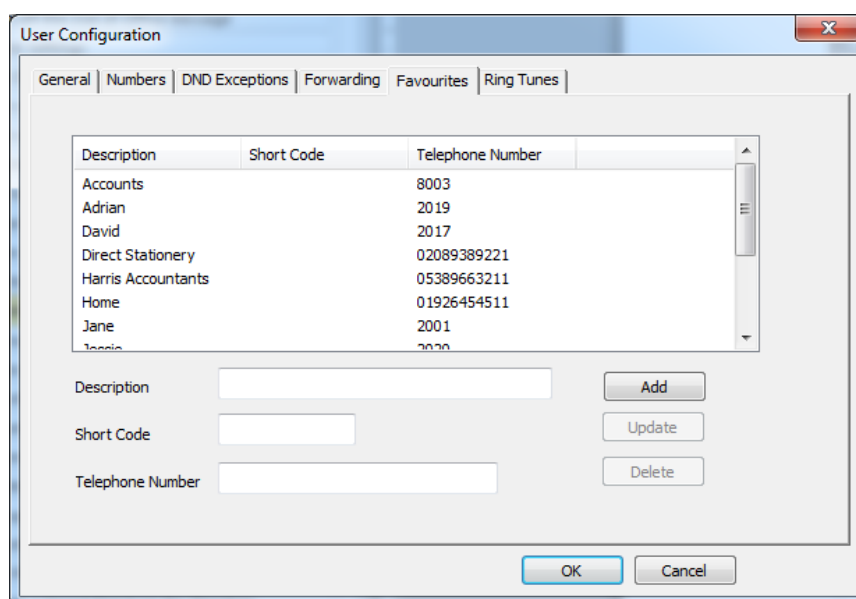
- You cannot change your extension number
- If all the fields are grey then you are unable to edit these fields. Please refer to your System Administrator for further details.
- **Do NOT enter internal extension numbers into Mobile, Home, Spare1 or Spare2. These fields are used to match Incoming CLI and dial external numbers only.**

Favourites

The Favourites section of your User Configuration form allows you to set up your own personal list of regularly used telephone numbers (internal or external). These are displayed and accessed within the Favourites window by click on the Favourites icon ♥. Favourites set up for internal extensions will also act as Busy Lamp Fields (BLF), in other words they will indicate when that User is on the phone.

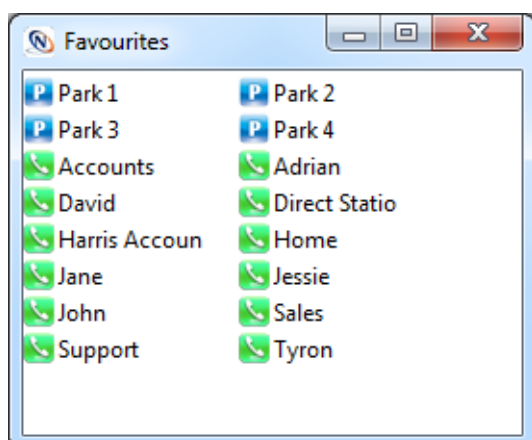
Create a Favourite

1. From the Edit menu select Settings
2. Select the Favourites tab
3. In the Description field enter any text (alpha-numeric characters only) that will identify this Favourite (up to 13 characters will be displayed in the Favourites window)
4. In the Telephone Number field enter the number to be dialled (internal or external number)
5. Select Add (the entry will be displayed in the list above)
6. Repeat steps 3 to 5 to add another Favourite
7. Select OK when you have finished



Please note: if a telephone number entered in a Favourites is also stored in the Contacts or Users directory, when a call is made to or received from this number, the text entered in the Description field of the Favourite will be displayed in Call Status in preference to the name used in the corresponding Contact or User directory entry.





Favourites window



Your Favourites will be displayed in the Favourites window which can be displayed by selecting the Favourites icon ♥ on the Tool bar or by selecting Favourites from the View menu. This window enables you to quickly and easily make calls, transfer calls and pick up calls.

Up to 13 characters of the Favourite's Description will be displayed in the Favourites window.

A Favourite displayed for an internal extension will act as a Busy Lamp field:-

-  **Jessie** An internal Favourite displayed with a green icon indicates that your colleague's extension is free
-  **Jessie** An internal Favourite displayed with a red icon indicates that your colleague is currently on a call.
-  **(1)Jessie** An internal Favourite flashing between a yellow and red icon indicates that either the User's extension is currently ringing or there are calls queuing for that Department. The number of calls waiting to be answered will be displayed. You can pick up a call ringing for this extension or Department by clicking once on the Favourite.
-  **(1)Sales**

If you would like your Favourites window to always be displayed on top of all windows on your Desktop please refer to the Favourites on Top section from page 72 for further details.

Make a call using a Favourite

1. Click once on the Favourite required and a call to this number will be made automatically

If you select a Favourite where the internal extension is busy you will be passed to the colleague's Forward on Busy number (if set) or to their voicemail (if enabled) or the call will be cancelled.

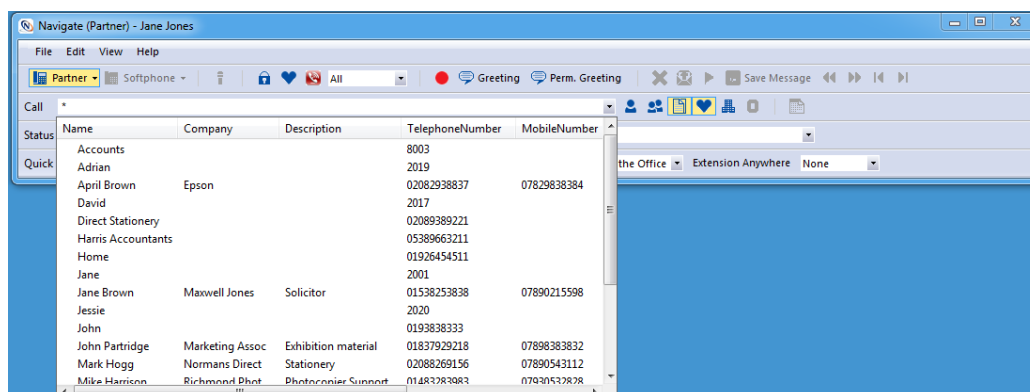
Transfer a call using a Favourite

1. Click once on the Favourite required
2. The original call will be placed on hold and a call will be made to the telephone number stored with the Favourite
3. Wait for the call to be answered
4. When ready select the Transfer icon to transfer the original call.

For further information on transferring a call please refer to page 9.

Viewing your Favourites via the Directory page

If you prefer you can access your Favourites via the Directory page, this might be useful if you do not wish to display the Favourites window, for example. Select the Favourites Filter icon so that when you enter text in the Call box the search will also look in your Favourites.



Amend a Favourite

1. From the Edit menu select Settings
2. Select the Favourites tab
3. Select the Favourites to be amended
4. The Favourite's details will be displayed in the fields below
5. Make the changes required
6. Select Update
7. Select OK to finish


Delete a Favourite

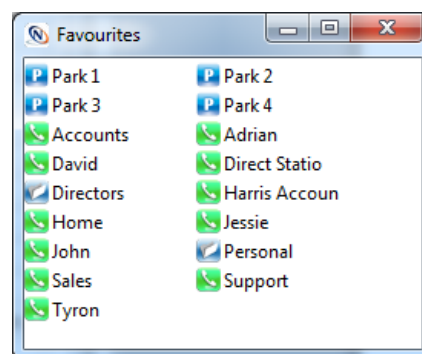
1. From the Edit menu select Settings
2. Select the Favourites tab
3. Select the Favourites to be deleted
4. Select the Delete button
5. Select OK to finish

Grouping Favourites


If you have multiple Favourites you may wish to organise them into Favourite Groups to make them easier to find. For example, you may wish to separate your personal Favourites from your business Favourites, or organise your Favourites by project or department, eg Exhibition, Directors, and so on. Firstly you will need to create a Favourite Group and then assign a Favourite to that group.

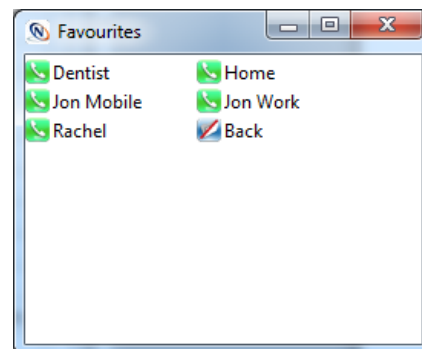
Creating a Favourite Group

1. Create a new Favourite as described from page 49.
2. In the Description field enter the name you wish to give the group, eg Personal
3. In the Short Code field enter GH:*group number*, eg GH:1
4. Remove any text from the Telephone field so that this field is blank
5. The Favourite Group will appear in your Favourites pane indicated by a blue folder icon 

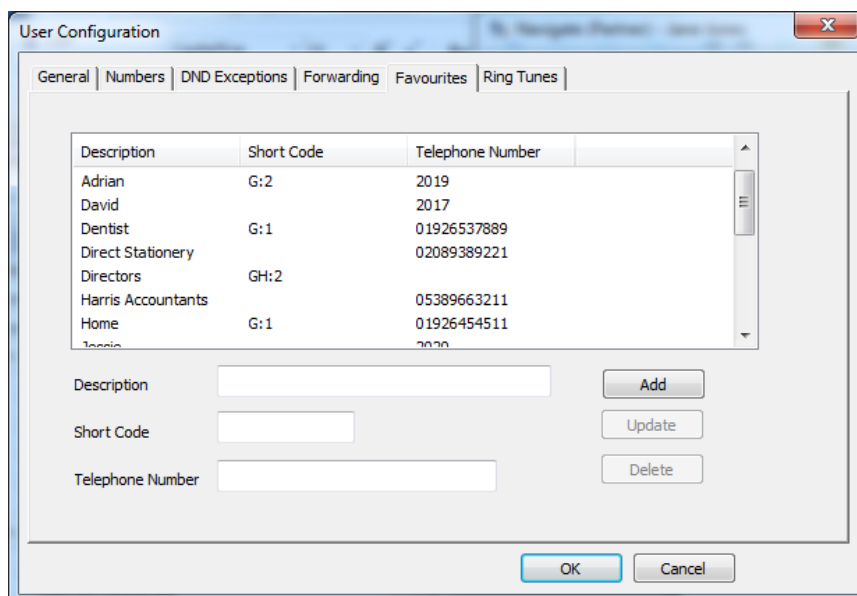


Assigning a Favourite to a Favourite Group

1. Create a new Favourite as described from page 49 or open an existing Favourite
2. In the Short Code field enter G:*group number*, eg G:1
3. Select Update or Add (depending on whether this is a new or existing Favourite)
4. Select OK when finished
5. This Favourite will now be available by selecting the relevant Favourite Group
6. Use the Back option  to return to main Favourites list



The following diagram gives an example configuration:



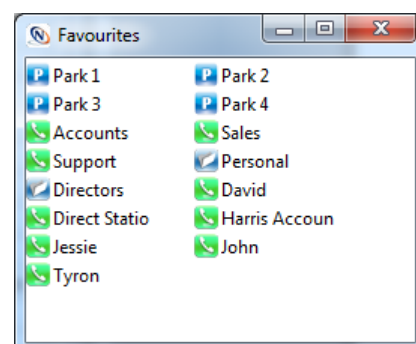
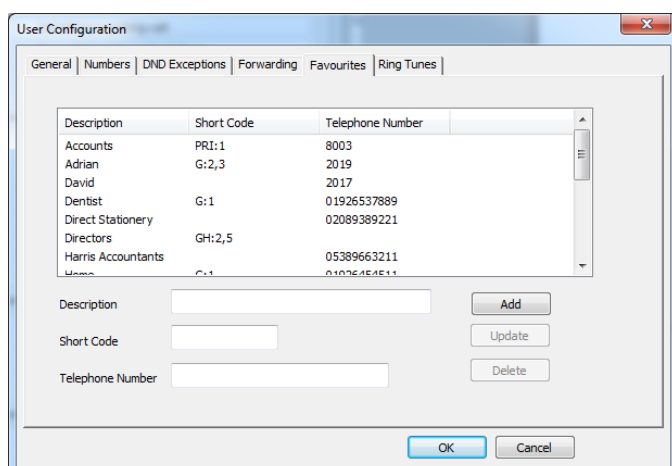
Prioritising Favourites

All Favourites and Favourite Groups will be displayed in alphabetical order. However if you wish to display your Favourites in a different sequence a display order number can be assigned using the following methods.

If you wish to specify where a Favourite will be displayed in your Favourites window, in the Short Code field enter *PR1:order number*, eg *PR1:1*.

If you wish to specify where a Favourite Group will be displayed in your Favourites window, in the Short Code field add a comma and then the order number required, eg *GH:1,6*

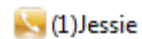
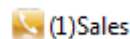
If you wish to specify where a Favourite assigned to a Favourite Group will be displayed within that group, in the Short Code field add a comma and then the order number required, eg *G:2,1*.



Call Pick up

You can pick up a call ringing on another extension via the Favourites window. This is useful if, for example, you wish to answer your colleague's phone when they are not at their desk or you wish to assist with answering calls to a Department. You do not have to be a member of the Department to pick up a Department call.

1. A Favourite displaying a flashing yellow/red icon indicates that the relevant extension has a call waiting to be answered.
2. Click once on the Favourite
3. The call will be answered by your extension

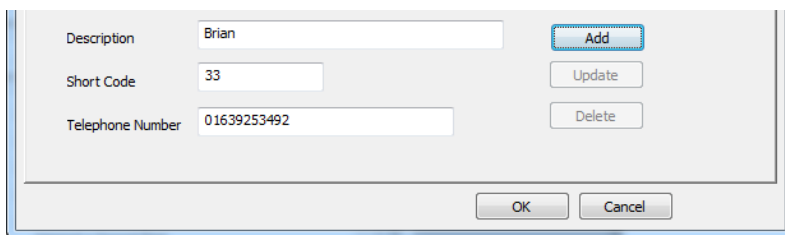
Please note:

- If you pick up a ringing call while you are on a call your original call will be parked in the first available park slot. Please refer to page 12 for further information on parking a call.
- If you do not wish your colleagues to pick up calls ringing on your phone via their Favourites, please contact your System Administrator who can configure this for you.

Assigning a short code to a Favourite

For numbers that you dial regularly you may prefer to assign a short code to a Favourite so, for example, you could dial just 33 to ring 01632953492. (Please note that the short code you use must not be the same as a short code you are already using for other system functionality, please refer to your System Administrator for further assistance.)

1. From the Edit menu select Settings
2. Select the Favourites tab
3. In the Description field enter any text (alpha-numeric characters only) that will identify this Favourite
4. In the Short Code field enter the code to be used to speed dial the number
5. In the Telephone Number field enter the number to be dialled (internal or external number)
6. Select Add (the entry will be displayed in the Favourites list)
7. Select OK to finish



Park icons

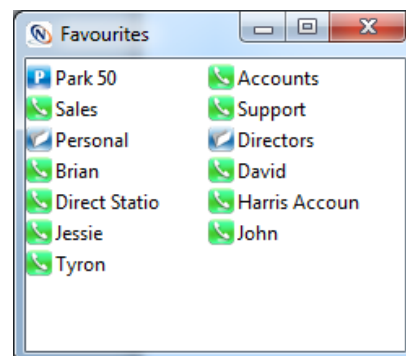
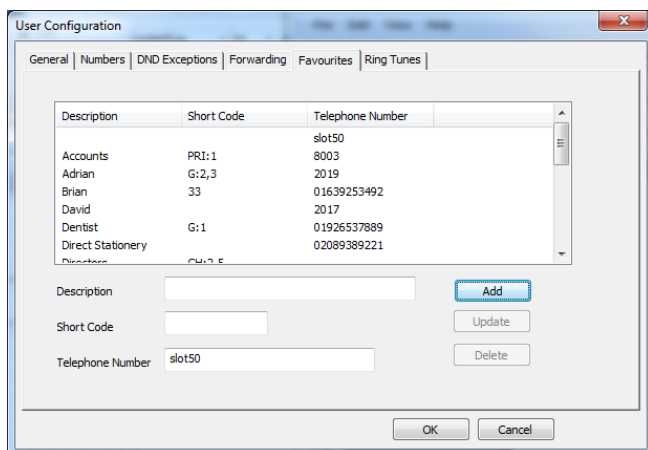
By default all Users of Navigate, PCS 60, and PCS 58x, 57x and 56x, within your company will have icons/buttons to access park slots 1-4. However you can choose to:

- create icons to access alternative park slots. This would be useful if you need an icon to a park slot that is only going to be used by the colleagues in your department, or you would like an icon to a park slot only used by yourself, for example.
- remove all the Park icons. This would be useful if, for example, you don't use the Park facility and you wish to have more room for your Favourites

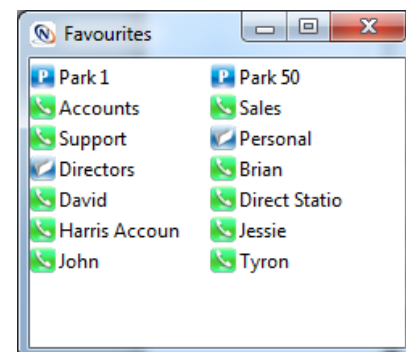
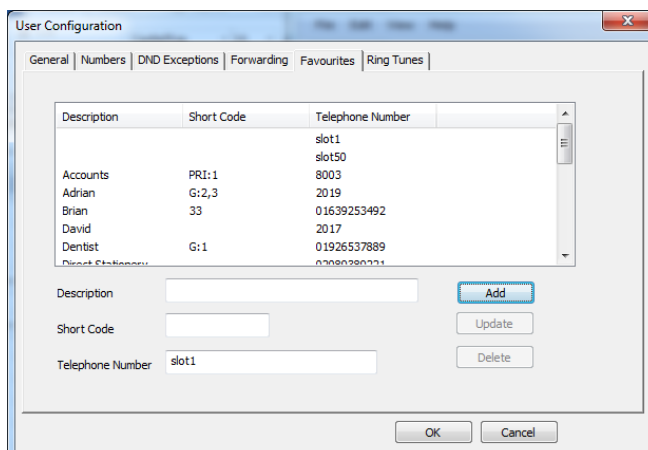
Please refer to the Parking a call section from page 12 for information on how to use the Parking facility.

Create a Park icon

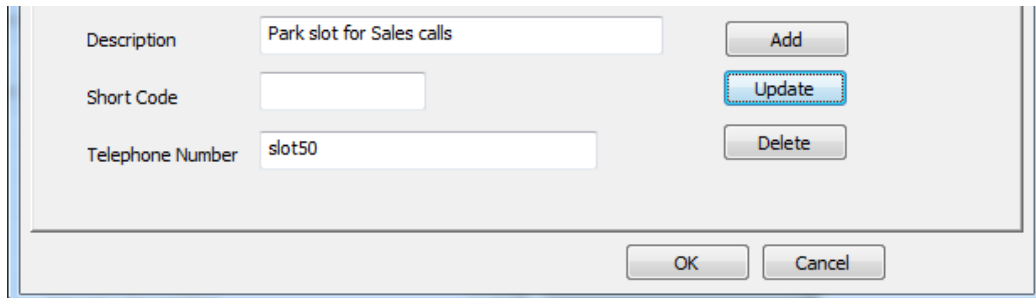
1. From the Edit menu select Settings
2. Select the Favourites tab
3. In the Telephone Number field enter *slot* followed by the park slot number to be accessed eg slot5, slot8, slot99 etc (The higher the number the less likely this slot will be used by other colleagues. There is no limit.)
4. Select Add (the entry will be displayed in the Favourites list)
5. Select OK to finish



When you create a new Park icon the original icons to park slots 1-4 will be removed from your Favourites window so that only the Park icons you require are displayed. (If you delete the new Park icon they will return.) You can recreate the icons to park slots 1-4 if required.



To help you identify the entry, within the Favourites list, you can enter any text (alpha-numeric characters) in the Description field. However, this text will not be displayed with icon within the Favourites window. "slot#" will always be displayed as, eg Park 1, Park 8, Park 99 and so on.

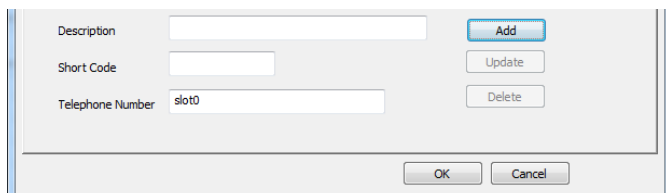
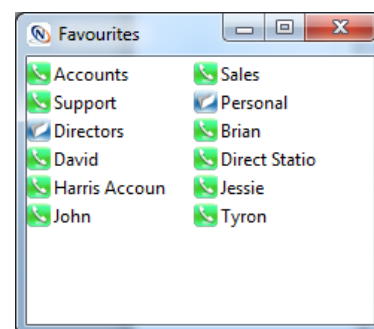


Please note: that if you delete all the Park icons that you created via the User Configuration form the default Park icons to Park Slots 1-4 will return to the Favourites window.

Remove the Park Icons

If you do not wish to use the Park icons and would prefer to utilise the space for your Favourites these can be removed as follows:

1. From the Edit menu select Settings
2. Select the Favourites tab
3. In the Telephone Number field, enter *slot0*
4. Select Add (the entry will be displayed in the Favourites list)
5. Select OK to finish

If you delete this entry in your Favourites list the icons to Park slots 1-4 will return.

Ring Tunes

The Ring Tunes section of the User Configuration form allows you to use ring tunes played by your Navigate application to distinguish between the different types of incoming calls, for example, between a Department call and a call to your User account. Your PC must have a sound card in order to use the Ring Tunes facility and the selected ring tune will be played over your PC's speakers. If you are using Navigate application to partner your PCS 58x, 57x or 56x this configuration will also affect the ring tune used by these handsets. Any other telephone handset will continue to use one of its pre-set ringing cadences.

Change the ring tune for an internal or external call

You may wish to distinguish between an incoming external call from an incoming internal call by the ring tone that you hear.

1. From the Edit menu select Settings
2. Select the Ring Tunes tab.
3. From the Type list box select Internal or External
4. From the Tune list box select the Tune required.
5. Select the Add button. The new entry will appear in the Ring Tunes list.
6. Select OK to finish

Type	Telephone Number	Tune	
Internal		Ring Tune 4	

Assigning a ring tune to a specific incoming number

You may wish to assign a ring tune to a specific number so that when you receive a call from a colleague or customer, for example, you will be able to recognise their call immediately.

1. From the Edit menu select Settings
2. Select the Ring Tunes tab.
3. From the Type list box select Caller ID
4. In the Telephone Number field enter the incoming number, either internal or external number
5. From the Tune list box select the Tune required.
6. Select the Add button. The new entry will appear in the Ring Tunes list.
7. Select OK to finish

Type	Telephone Number	Tune	
CallerID		Ring Tune 6	

Differentiate a Department call from a call to your extension

If you are receiving Department calls you may wish to distinguish between a call to your User account and a Department call by using a different ring tune.

1. From the Edit menu select Settings
2. Select the Ring Tunes tab.
3. From the Type list box select Destination.
4. In the Telephone Number field enter the relevant number.
 - a. If you wish to differentiate your User calls from other calls enter your extension number here, or
 - b. If you wish to differentiate calls to a specific Department, enter the Department extension number here (please refer to your System Administrator if you are unsure which number to use here).
5. From the Tune list box select the Tune required.
6. Select the Add button. The new entry will appear in the Ring Tunes list..
7. Select OK to finish

Type	Telephone Number	Tune	
Destination	2001	Ring Tune 3	

For further information on Departments please refer to page 23.

Assign no ringing sound for a specific incoming call

If you wish that no ringing is heard for a specific incoming call create the entry as described above however in the Tune field select a tune number where no corresponding WAV file is stored on your PC. By default, this will be Ring Tune 7, 8, 9. Please refer to your system administrator for further assistance.

Assign a ring tune for Follow Me Dual Personal or Dual All

If you have Follow Me Dual Personal or Dual All set (please refer to page 41 for further details) you may wish to have a different ring tune played on Navigate to remind you that this feature has been set.

1. From the Edit menu select Settings
2. Select the Ring Tunes tab.
3. From the Type list box select Dual Ringing.
4. From the Tune list box select the Tune required.
5. Select the Add button. The new entry will appear in the Ring Tunes list.
6. Select OK.

Type	Telephone Number	Tune	
DualRinging		Ring Tune 6	

System Ring Tune Type

The System Type is used for calls generated by the telephone system, for example voicemail call-back. Please refer to your System Administrator for further information.

Amend a Ring Tune entry

1. From the Edit menu select Settings
2. Select the Ring Tunes tab
3. Select the Ring Tune to be amended
4. The entry will be displayed in the fields below
5. Make the changes required
6. Select Update
7. Select OK to finish

Delete a Ring Tune entry

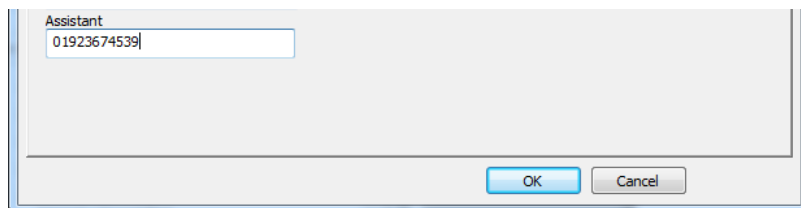
1. From the Edit menu select Settings
2. Select the Ring Tunes tab
3. Select the Ring Tune to be deleted
4. Select the Delete button
5. Select OK to finish

Extension Anywhere

If you are a user of a PCS 58x/57x/56x or analogue handset and your Navigate is partnering this telephone you can use the Extension Anywhere feature when you are, for example, working from home. This feature will allow you to receive and make calls from, for example, a home telephone or mobile as though you were in the office. This means callers/recipients will be unaware that you are working from home, you will not incur any call charges and you will be able to handle the call as if you were in the office, eg transfer calls.

Your System Administrator can configure this facility for you. Once set up you can use the Extension Anywhere list box in your Quick Settings Bar to turn this feature on or off. Firstly, you must enter your Extension Anywhere number, for example, your home telephone number, into your Assistant Number field as follows:

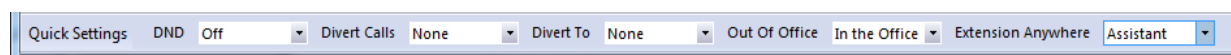
1. From the Edit menu select Settings
2. Select the Numbers tab
3. In the Assistant Number field enter the number required, for example, your home telephone number
4. Select OK to save the changes.



A screenshot of a dialog box titled 'Assistant'. It contains a text input field with the number '01923674539' entered. Below the input field are two buttons: 'OK' and 'Cancel'.

Turn on Extension Anywhere

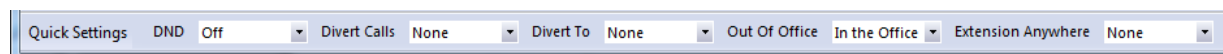
From the Extension Anywhere list box in your Quick Settings Bar select Assistant



A screenshot of the Quick Settings Bar. It shows several dropdown menus: 'DND' (Off), 'Divert Calls' (None), 'Divert To' (None), 'Out Of Office' (In the Office), and 'Extension Anywhere' (Assistant).

Turn off Extension Anywhere

From the Extension Anywhere list box in your Quick Settings Bar select None



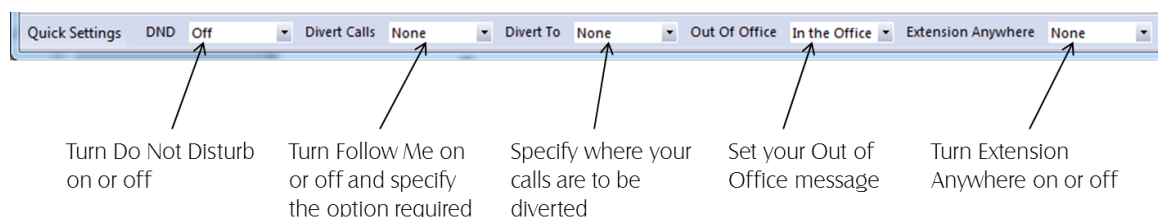
A screenshot of the Quick Settings Bar. It shows several dropdown menus: 'DND' (Off), 'Divert Calls' (None), 'Divert To' (None), 'Out Of Office' (In the Office), and 'Extension Anywhere' (None).

Please ensure that you do not have Follow Me turned on at the same time as Extension Anywhere otherwise you will receive two calls, and if you answer the forwarded call you will not be able to use the Extension Anywhere facilities, such as the ability to transfer the call.

Please refer to your system administrator for further information on the Extension Anywhere feature.

Quick Settings

The Quick Settings bar enables you to quickly and easily turn on or off Do Not Disturb, Follow Me, your Out of Office message and Extension Anywhere. These features are covered in more detail above, in the relevant chapter of the User Configuration section from page 38.



A screenshot of the Quick Settings Bar with five arrows pointing to the dropdown menus. Below each arrow is a descriptive text:

- Turn Do Not Disturb on or off (points to DND)
- Turn Follow Me on or off and specify the option required (points to Divert Calls)
- Specify where your calls are to be diverted (points to Divert To)
- Set your Out of Office message (points to Out Of Office)
- Turn Extension Anywhere on or off (points to Extension Anywhere)

Voicemail

The voicemail facility allows your callers to leave you a message if you are on the phone or do not answer a call. Your System Administrator can enable this facility for you, if not already available. (Further information on using voicemail is available in the Understanding Voicemail document obtainable via the SpliceCom website.)

Receiving a Message

If you are busy on a call or do not answer your phone the caller will be automatically passed to your voicemail and will be able to leave a message. By default, your extension will ring for 20 seconds before your extension is considered not answered. Your System Administrator will be able to tell you if this default setting has been changed.

If a caller has left a message the Messages icon  with flash until you have listened to the message.

The Navigate icon on your Task Bar will also display the Messages icon to indicate that you have received a new voicemail message.




The broken dial tone provided by your handset may also indicate that you have a new message (partner mode only).

If you have received a new message and have missed a call the Messages icon will flash but will also display a telephone handset and a red circle in the background.



Divert an incoming call to voicemail

If you do not wish to answer a call and wish to route the caller to your voicemail, select the Send to VM icon , from Call Status.




Please note that if you reject a call you do not wish to answer (via the Hang Up icon or Esc key on your keyboard or Reject button on the Incoming Call Alert window) the call will also be routed to your voicemail unless you have Forward on Busy set.















Status Bar


The Status Bar will display the number of new messages currently stored in your mailbox to give you a quick visual indication of your voicemail status.






Listen to a message

1. Select the Messages icon  from the Tool Bar.
2. Your messages will be listed in your calls history.

Time	Name	Number	Mailbox
 09:50 15/2/2...	Adrian Brown	2019	Jane Jones
 09:48 15/2/2...	01632345689	01632345689	Jane Jones
 09:33 15/2/2...	Adrian Brown	2019	Jane Jones
 09:29 15/2/2...	Adrian Brown	2019	Jane Jones
 09:23 15/2/2...	Jessie Cogger	2020	Jane Jones
 09:22 15/2/2...	Adrian Brown	2019	Jane Jones
 07:41 15/2/2...	Adrian Brown	2019	Jane Jones
 20:16 13/2/2...	Jane Jones	2001	Jane Jones
 20:15 13/2/2...	Jessie Cogger	2020	Jane Jones
 11:44 11/2/2...	Adrian Brown	2019	Jane Jones
 10:56 11/2/2...	Adrian Brown	2019	Jane Jones
 10:56 11/2/2...	Adrian Brown	2019	Jane Jones
 10:34 11/2/2...	David Exeter	2017	Jane Jones
 10:34 11/2/2...	Adrian Brown	2019	Jane Jones

3. A new message will be indicated by a blue icon displaying a closed envelope 
4. Partner mode - lift your handset and double click on the message you wish to listen to
or
IP soft phone mode - double click on the message you wish to listen to
5. This message will be played to you.
6. You can hang up at this point or delete/save/forward etc the message as described in the Message Handling section below.

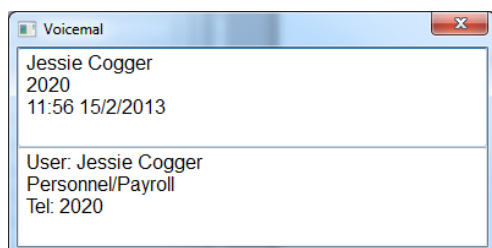
The message will now be displayed in your calls history with a blue icon displaying an open envelope icon , as this is now an old message and will be deleted after 7 days unless manually saved. A message is marked as old after listening to the first 10 seconds.

Time	Name	Number	Mailbox
 09:50 15/2/2...	Adrian Brown	2019	Jane Jones
 09:48 15/2/2...	01632345689	01632345689	Jane Jones

Voicemail Information

While listening to a message, you can view the details of the call via the Voicemail Information window as follows.

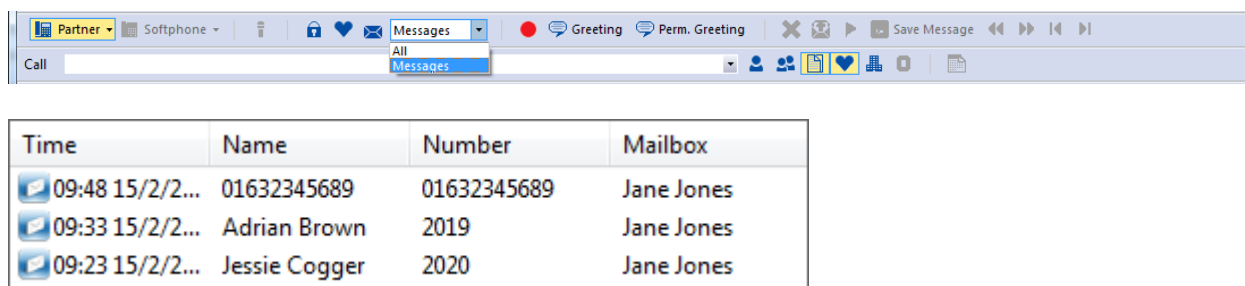
1. While listening to a message, from the View menu select Voicemail Information.



This window will automatically close when you select the Hang Up icon or replace your handset (partner mode).

View just your voicemail messages in Calls History

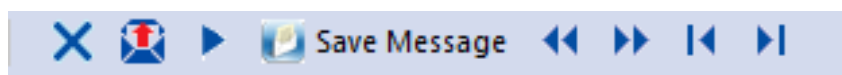
If you want to quickly find all your voicemail messages, rather than scrolling through your calls history, from the Messages list box select Messages, then click on the Message icon . The Calls History pane will display just your voicemail messages.




From the Messages list box select All to view your complete calls history.

Message Handling

While a message is being played the following options are available:



Delete  - delete the message permanently

Forward Message  - forward the message to a colleague(s)

Play Message  - listen to the message again

Save Message  - save the message until manually deleted


Rewind Message  - rewind the message by 2 seconds

Fast Forward Message  - forward the message by 2 seconds

Skip Back Message  - listen to the previous message

Skip Forward Message  - listen to next message



Delete a message

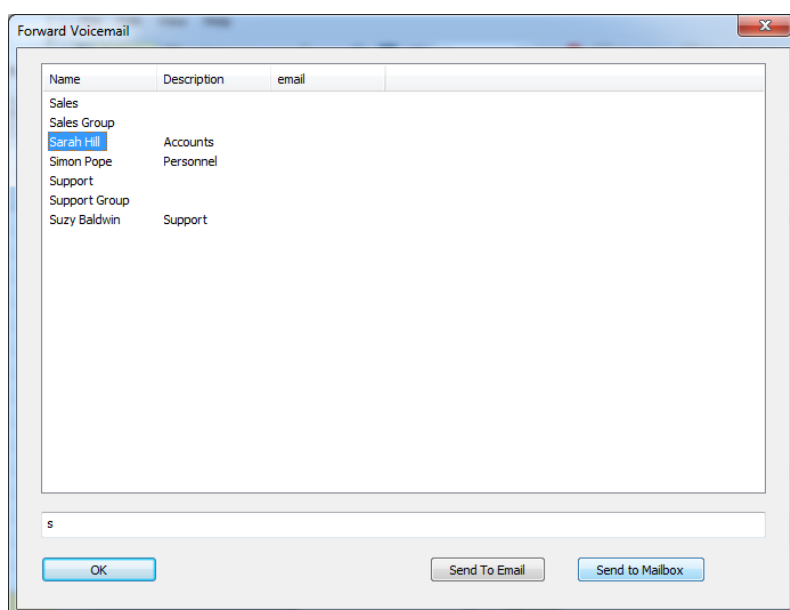
1. Click on the Messages icon 
 2. Within the Calls History window, double click on the message you wish to delete
 3. Select the Delete icon.
- or
2. Within the Calls History window, right click on the message you wish to delete
 3. Select Delete

Forward a message



The Forward Message facility allows you to forward a message to a colleague or group of colleagues or Department if the content is more relevant to another member of staff, for example. Alternatively, you can forward a message to a colleague's or Department's email account or to your own email account. The message will appear as a sound file in an email and a PC with a sound card and speakers will be required to listen to the message. (This facility must be previously set up on your telephone system – please refer to your System Administrator for further information.)

Forward a message to a colleague's, a group of Colleague's or Department's voicemail

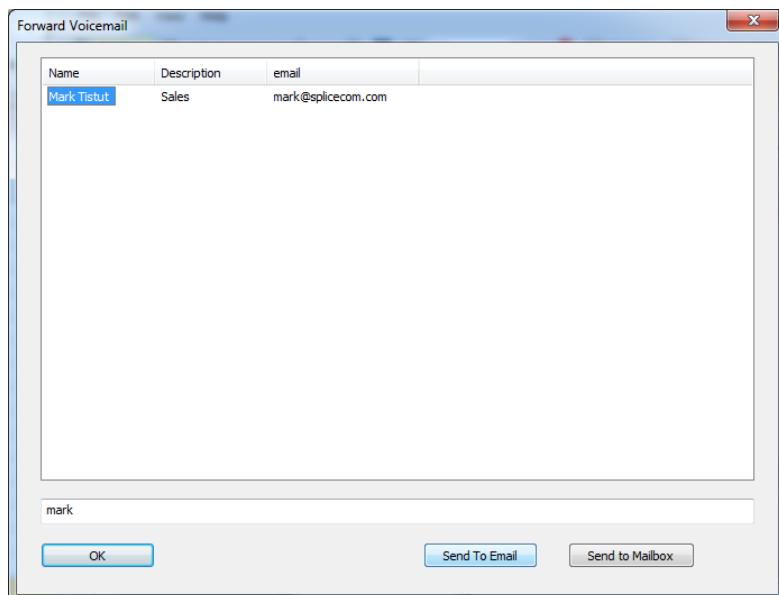
1. Click on the Messages icon 
2. Within the Calls History window, double click on the message you wish to forward
3. Ensure that the Directory Filter icons required are selected. (The list of entries displayed in the Forward Voicemail window will be dependent on the filter icons selected.)
4. Click on the Forward Message icon 
5. In the Forward Voicemail window, in the text box at the bottom, start to enter the name of the colleague or Group or Department you wish to forward the message to.
6. Once the name required is displayed, select this User or Group or Department.
7. Select Send to Mailbox
8. A note will be displayed from the Navigate icon in the Notification Area, indicating that the message has been forwarded
9. You can repeat steps 3 to 6 to forward the message to another colleague or Group or Department
10. Select OK when you have finished



Forward a message to an email account

1. Click on the Messages icon 
2. Within the Calls History window, double click on the message you wish to forward
3. Ensure that the Directory Filter icons required are selected. (The list of entries displayed in the Forward Voicemail window will be dependent on the filter icons selected.)
4. Click on the Forward Message icon 
5. In the Forward Voicemail window, in the text box at the bottom, start to enter the name of the colleague you wish to forward the message to.

6. Once the name required is displayed, select this User.
7. Select Send to Email
8. A note will be displayed from the Navigate icon in the Notification Area, indicating that the message has been forwarded
9. You can repeat steps 3 to 6 to forward the message to another colleague
10. Select OK when you have finished



Forward a message to multiple Users, Groups or Departments

Within the Forward Voicemail dialog box use either the Shift or Ctrl key to select multiple Users.

Please note that you can use the asterisks (*) to view all the entries in one list (dependent on the Directory Filter icons selected).

Recording a Greeting


A default message will be played to a caller when transferred to your voicemail. However you may wish to record your own personal message.

You can record two voicemail greetings via Navigate. Firstly, you have a daily greeting that can be used to inform a caller of your whereabouts on a particular day, for example – “You have reached Alice Barker’s voicemail on Tuesday, 4 July. I am currently in a meeting until 11 o’clock. Please leave a message and I will call you on my return.” Your second greeting, the permanent greeting, can be used to give a message that can be used on any day, for example – “You have reached Alice Barker’s voicemail. Sorry I am unable to take your call. Please leave a message and I will get back to you as soon as possible.” If you record a permanent greeting your daily greeting is deleted at midnight and the permanent greeting is then used until a new daily greeting is recorded.



Record a daily greeting

Partner mode

1. Lift your handset
2. From the Tool bar, click on the Greeting icon 



3. Your existing greeting will be played
4. When requested record your new greeting and press # on your handset when you have finished.
5. Your new greeting will be played back to you.
6. Replace your handset or select the Hang up icon  to save the new greeting and finish.

IP Soft Phone mode



1. From the Tool bar, click on the Greeting icon 
2. Your existing greeting will be played
3. When requested record your new greeting
4. Wait in silence for a few seconds and your new greeting will be played back to you
5. Select the Hang up icon  to save the new greeting and finish

Record a permanent greeting

Partner mode

1. Lift your handset
2. From the Tool bar, select the Perm. Greeting icon 
3. Your existing greeting will be played
4. When requested record your new greeting and press # on your handset when you have finished.
5. Your new greeting will be played back to you.
6. Replace your handset or select the Hang Up icon  to save the new greeting and finish.

IP Soft Phone mode

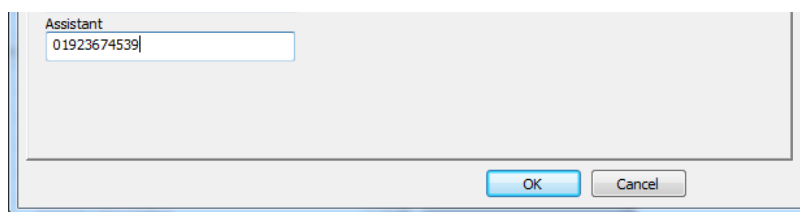
1. From the Tool bar, click on the Perm. Greeting icon 
2. Your existing greeting will be played
3. When requested record your new greeting
4. Wait in silence for a few seconds and your new greeting will be played back to you
5. Select the Hang up icon  to save the new greeting and finish

You can also record a further four greetings used when you have set an Out of Office message as described from page 43. Your callers will be played the In Meeting greeting, the At Lunch greeting, the On Holiday greeting or the Off Site greeting depending on the Out of Office message selected. By default, this will be your Permanent Greeting. However if you wish to record a specific greeting for each Out of Office message please refer to the Understanding Voicemail document available on the SpliceCom website or your System Administrator for further details.

Using an Assistant telephone number

You may wish to give your callers the option to be transferred to a colleague, such as your assistant or another member of your team, or to your mobile rather than leave a message. The Assistant telephone number feature can be configured as follows:

1. From the Edit menu select Settings
2. Select the Numbers tab
3. In the Assistant field enter the number which callers are to be transferred to.
4. Select OK to save the changes.




Once this feature has been configured your caller can press 0 while listening to your greeting and be transferred to your Assistant telephone number. You will need to re-record your greeting to inform your callers that facility is available.

Please note

- If the Assistant field is greyed out then you are unable to edit this field. Please refer to your System Administrator for further details.
- The Assistant number is also used with the Call Forwarding feature. Please refer to page 40 for further details.
- The Assistant number is also used with the Extension Anywhere feature. Please refer to the Extension Anywhere section from page 57 for further information.

Ring back a caller

After receiving a message from a caller you may wish to ring them back. The number that was received with the original call will be shown within the Number column and the Choose icon will enable you to speed dial this number.


1. Select the Messages icon 
2. Within the Calls History window, click on the number you wish to dial

Please note:

- If the caller's number has been withheld or not received by the system this facility will not be available. The Number column will indicate if the caller's telephone number has been received.
- If the caller's number received with the message is matched to a User or Contact stored on the system you will be able to right click on the entry and use the Choose Number to Dial option to dial other numbers, eg a mobile number, stored against this User or Contact.

Leave a message for a colleague

You will automatically transfer to your colleague's voicemail if they are busy or do not answer their phone. However you can pre-empt this and transfer directly to their voicemail.


1. Make a call to your colleague
2. Click on the Send to VM icon , from the Call Status pane
3. Leave a message when requested

Leave a message for a colleague without dialling the number first

1. Enter the colleague's name or extension number in the Call box
2. Within the Directory window right click on the User required
3. Select Choose Number to Dial
4. Select the Voicemail button

5. Leave a message when requested



Transfer a call to a colleague's voicemail

1. Place the call on hold by selecting the Hold icon 
2. Enter the colleague's name or extension number in the Call box
3. Within the Directory window right click on the User required
4. Select Choose Number to Dial
5. Select the Voicemail button
6. You will no longer have control of the call.

Record a Call

During any call (internal or external or conference call) you can record the conversation. The resulting recording will become a new voicemail message and can be accessed in the usual way.

Please note that the use of this feature is controlled by your System Administrator. If the Record icon is not available please refer to your System Administrator.

1. During a call select the Record icon , from the Call Status pane
2. The Record icon will become red 



To end the recording either select the Record icon  or end the call.

Record a Memo



You may wish to record a message to yourself, for example when you wish to record a reminder to perform a particular task - book a meeting, phone a customer etc. The resulting recording will become a new voicemail message and can be accessed in the usual way.

(Please note that the use of this feature is controlled by your System Administrator. If the Memo icon is not available please refer to your System Administrator.)



Partner mode

1. Lift your handset
2. From the Tool bar, select the Memo icon 
3. Record the message you require
4. Replace your handset or select the Hang up icon  to finish and save the memo

IP Soft Phone mode

1. From the Tool bar, select the Memo icon 
2. Record the message you require
3. Select the Hang up icon  to finish and save the memo

The memo can be access via the Messages icon  and Calls History will display your name in the Name and Mailbox columns.




Time	Name	Number	Mailbox
 11:48 15/2/2...	Jane Jones	2001	Jane Jones
 11:47 15/2/2...	Adrian Brown	2010	Jane Jones

Voicemail for Departments

Each Department can be configured to use the voicemail service provided by the **maximiser** system. If voicemail has been enabled, a call to a Department will automatically pass to voicemail after the time specified by the Department's configuration on the system. Please refer to your System Administrator for further details.

Listen to a message for a Department

Your Messages window can give you access to voicemail messages received for a Department. Your System Administrator can configure this facility for you, if not already available. You can retrieve and handle the messages in the same way as your personal messages. The Mailbox column will indicate in which mailbox the message is stored.


Time	Name	Number	Mailbox
 11:56 15/2/2...	Jessie Cogger	2020	Sales
 11:47 15/2/2...	Adrian Brown	2019	Jane Jones
 11:44 15/2/2...	Adrian Brown	2019	Jane Jones

The Status Bar will indicate how many new messages and missed calls the Department has received. Click on the list box arrow to the right of the Status Bar to view this information for the relevant Department.

Status	Sales New Msgs 0 Missed 1
Total Msgs	New Msgs 1 Missed 3 Jane Jones New Msgs 1 Missed 2
Quick Search	Sales New Msgs 0 Missed 1

Please note that if you are able to access Department voicemail messages via Navigate, answered and missed calls for the Department will also be displayed in your call history. Please refer to the Viewing your Calls History section from page 18 for further details.


Leave a message for a Department

1. Make a call to the Department
2. Click on the Send to VM icon , from the Call Status pane
3. Leave a message when requested

Leave a message for a Department without dialling the number first

1. Via the Call box search for the Department required
2. Within the Directory window right click on the Department required
3. Select Choose Number to Dial
4. Select the Voicemail button
5. Leave a message when requested

Transfer a call to a Department's voicemail

1. Place the call on hold by selecting the Hold icon 
2. Use the Call box to search for the Department required.

3. Within the Directory window right click on the Department required
4. Select Choose Number to Dial
5. Select the Voicemail button
6. You will no longer have control of the call.

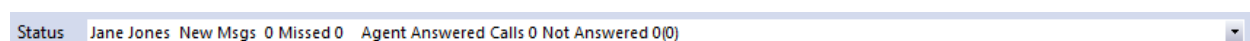
For further information on using the Directory please refer to the Using the Directory section from page 15.
For further information on transferring a call please refer to page 9.

Using Navigate as a Vision Call Centre Agent

If you are an agent within a SpliceCom Vision Call Centre the following features may be available to you. For further information on Vision please refer to your System Administrator.

Status Bar

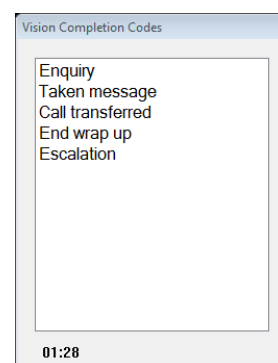
The Status Bar will display the number of calls you have answered since log in and the number of calls that have been presented to your extension but you have not answered. Your Not Answered data is presented as x(y) where x is the number of successive calls that you have not answered, and y is the total number of calls you have not answered since log in.



Completion Codes

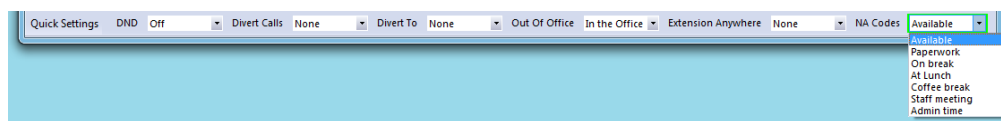
After receiving a call as an agent your phone may be placed in Wrap Up to give you time to complete administrative tasks. Completion Codes can be configured to be displayed during this time (these enable your supervisor/manager to monitor calls via reports available with Vision).

If configured on your system, when you end the call, the Vision Completion Codes window will be displayed, select the completion code required. This may be configured to take you immediately out of Wrap-up so that you can take another call, or configured to give you extra Wrap-Up time in order to complete further tasks. Your system administrator will inform you of the functionality of each completion code.

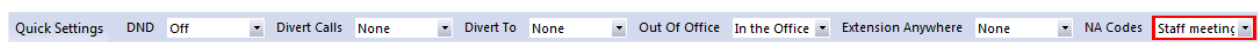


Not Available Codes

Not Available Codes can be configured on your system to enable you to inform your supervisor why you are unable to take calls. These will appear in your Quick Settings Bar if configured.



From the NA Codes list box select the code that is relevant to you. This code may be configured so that you no longer receive Agent calls but can still receive calls to your extension and DDI number, or configured to turn on Do Not Disturb so that you do not receive any calls.



For further information on using DND please refer to the Do Not Disturb section from page 45.

For further information on any of these features please refer to your system administrator or the Vision User Manual available on the SpliceCom website.

Navigate Configuration

Hot Desking/Log In


If you are a hot desking User, in other words a User who has been given the ability to log in to any phone on the system because, for example, you need to move around the building or you are rarely in the office and do not need a permanent telephone or you share a desk with a colleague(s), you can log in via Navigate.

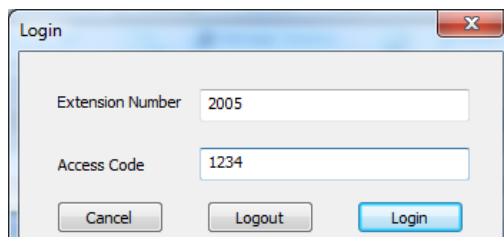
The benefit of logging in as yourself rather than using someone else's phone is that all your User settings follow you. This means that when you make a call the recipient will know the call is from you; you will have access to your User configuration and can set features such as DND, Follow Me etc; all your Favourites will be available to you; you will be informed when you receive a new voicemail message and you will be able to easily listen to these messages.

You will need to know your extension number and Login Access Code, please refer to your System Administrator for these details.

If your Navigate is configured to partner a handset, by logging on via Navigate you will also be logging on to the associated handset. This is useful if you share a desk with a colleague and therefore the PC on that desk. (You can also log on via the handset and this will automatically partner Navigate to this handset. Please refer to your system administrator for further details.)

Log On


1. From the Tool bar, select the Login icon 
2. In the Extension Number field enter your extension number, eg 2005
3. In the Access Code field enter your Login Access Code, eg 1234
4. Select the Login button
5. Wait for Navigate to communicate with the telephone system
6. When the log in is complete the Status Bar will indicate who is currently logged in.



Status April Day New Msgs 0 Missed 0

Log off

If you have finished using the handset (partner mode) or Navigate you are currently logged on to, you can log yourself out. Unless you log on to another handset or Navigate, your extension will be unavailable therefore your calls will go to your Forward on Busy number (if set), or to voicemail (if enabled) or the caller will receive the busy tone.

1. Select the Login icon 
2. Select the Logout button
3. Wait for Navigate to communicate with the telephone system (this may take a while)
4. Navigate will log back in the assigned User (in other words the User permanently allocated to this handset (partner mode) or Navigate on the PC (IP soft phone) or display "Searching for Server...".

Please note:

- Your User account may be configured to automatically log you off after the extension is not used for a specified amount of time. This is useful if you forget to manually log off. Please refer to your System Administrator for further details.
- If, when you come into the office, you sit at any available desk and wish to use the handset on that desk partnered with Navigate on your laptop, for example. Navigate can be configured to enable you to log on to any handset (PCS 58x/57x/56x or analogue handset only) available. Please refer to your system administrator for further details.

Manually label your parked calls

When you park a call the name (if the incoming number is recognised by the system) or number of the caller will be displayed within the Park icon. (For further information on parking a call please refer to the Parking a call section from page 12 for further details.) Alternatively you can determine the information displayed by using the Park Label option. For example, you could use this facility to display the caller's name rather than their number. This is useful if you receive a lot of calls where the incoming CLI will not be matched within the Contacts database. Alternatively, you could display the name of the colleague that the caller is waiting for, this might be useful to ensure your colleagues pick up the correct call.

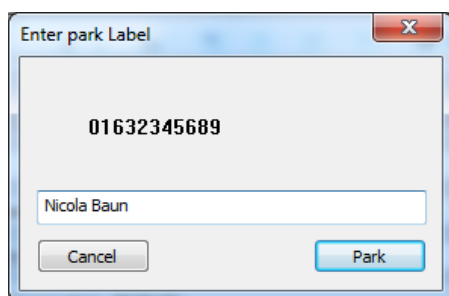
Turn on Park Label

1. From the Edit menu
2. Select Park Label

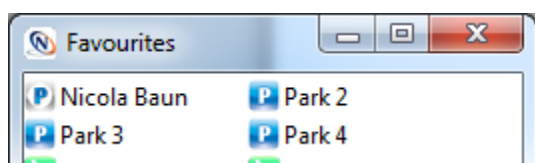
This option will be displayed with a tick when enabled.

Using a Park Label

1. Within the Favourites window, click on the Park icon where you wish to park a call
2. The "Enter park label" dialogue box is displayed
3. In the text box enter the text you wish to display on the Park icon



4. Select Park when you are ready
5. This text will now be displayed on the relevant Park icon



6. This text will also be displayed on all your colleagues' park icons that access the same park slot

If you select Cancel within the “Enter park label” dialogue box the call will not be parked.

If you do not enter any text within the “Enter park label” dialogue box and select Park the default information will be displayed within the park icon, ie the User name or Contact name (if the number is recognised by the system) or the caller’s number.

Turn off Park Label

1. From the Edit menu
2. Select Park Label

This option will no longer be displayed with a tick.

Favourites on Top

If you would prefer your Favourites window to always be visible, you can configure Navigate so that the Favourites window is permanently at the front of any other windows you have open on your PC.

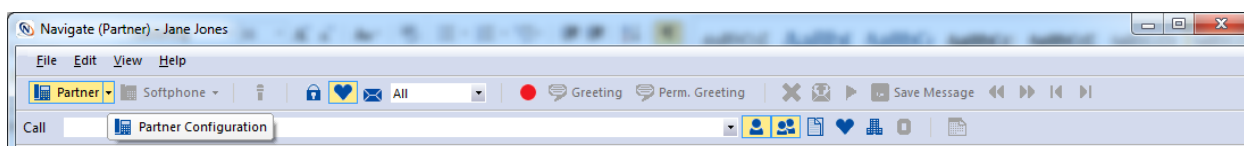
1. Open your Favourites window, by clicking on the Favourites icon ♥ on the Tool bar
2. From the Edit menu select Favs. On Top

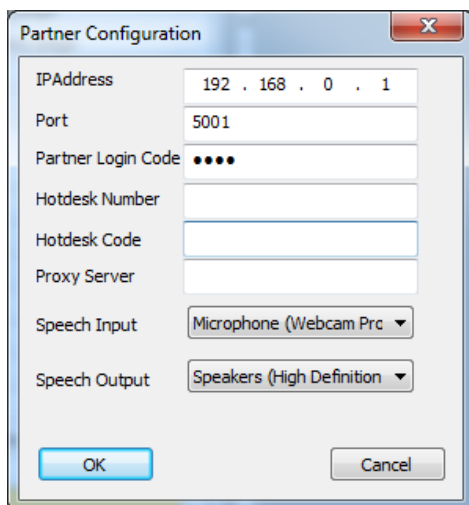
This option will be displayed with a tick when enabled.

When you want the Favourites window to return to normal behaviour, so that it will disappear behind the active window, from the Edit menu select Favs. On Top. This option will no longer be displayed with a tick.

Partner Configuration

If Navigate is configured to partner your handset the Partner button on the Toolbar will be active. This configuration can be accessed by selecting the down arrow beside the Partner icon. In most cases these options will be configured for you and must not be changed, however here is a brief description of each field for your information. Please refer to your system administrator for further details if required.





The Partner Configuration dialog box contains the following fields and controls:

- IPAddress:** 192 . 168 . 0 . 1
- Port:** 5001
- Partner Login Code:** Four dots (••••)
- Hotdesk Number:** Empty text field
- Hotdesk Code:** Empty text field
- Proxy Server:** Empty text field
- Speech Input:** Microphone (Webcam Pro) [dropdown arrow]
- Speech Output:** Speakers (High Definition) [dropdown arrow]
- Buttons:** OK and Cancel

IP Address: The IP address of the module or PCS 58x/57x/56x that the Navigate application will connect to.

Port: The number corresponding to the port on the module entered in the IP Address field. This will always be 5001 if partnering a PCS 58x/57x/56x.

Partner Login Code: The digits entered in the handset's Partner Login field on the system configuration.

Hot Desk Number and Hot Desk Code: These fields, in conjunction with the Port and Partner Login Code fields, can be used to assist you if you are a hot desking User. These fields can be configured to allow you to log on to more than one choice of handset and your Navigate will automatically partner any of these handsets. This is useful if, for example, you are a laptop user and when you come in to the office you log on to any available phone at any available desk. Navigate can be configured once to partner any of these handsets (PCS 58x/57x/56x or analogue handset only). Please refer to your system administrator for further information.

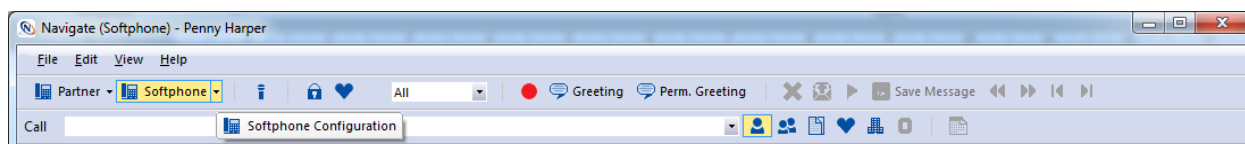
Proxy Server: not currently used

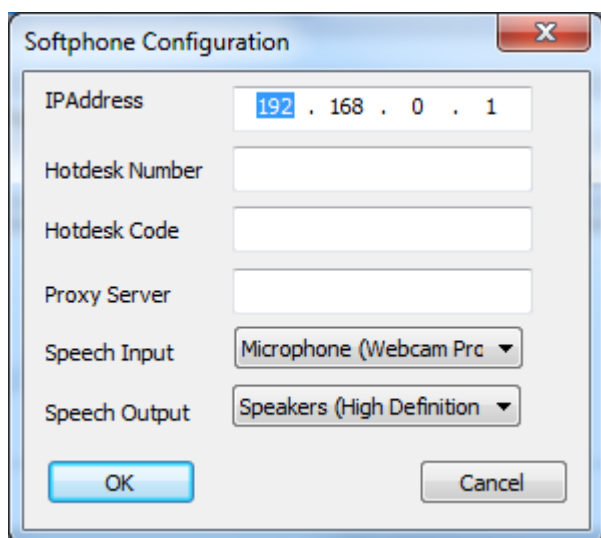
Speech Input: this will be taken from the setting on your PC, otherwise use the drop down list to select the Microphone you would like to use.

Speech Output: this will be taken from the setting on your PC, otherwise use the drop down list to select the Speakers you would like to use.

Softphone Configuration

If Navigate is running as an IP Soft Phone the Softphone button on the Toolbar will be active. This configuration can be accessed by selecting the down arrow beside the Softphone icon. In most cases these options will be configured for you and must not be changed, however here is a brief description of each field for your information. Please refer to your system administrator for further details if required.





IP Address: The IP address of the Call Server that the Navigate application will connect to.

Hotdesk Number, Hotdesk Code and Proxy Server: not currently used

Speech Input: this will be taken from the setting on your PC, otherwise use the drop down list to select the Microphone you would like to use.

Speech Output: this will be taken from the setting on your PC, otherwise use the drop down list to select the Speakers you would like to use.

Set up Information

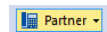
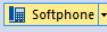











The version of Navigate software being used and set up information can be viewed by selecting the Help menu and then About Navigate. The following window will be displayed:

- Software version
- IP address of the PC
- User currently logged in
- Extension number of the User
- IP address of the Call Server to which Navigate is connected
- IP address of the Call Server providing the User's voicemail service.





Icons in Brief








Tool Bar

-  Use the Down arrow to open the Partner Configuration dialogue and view the settings that enable Navigate to partner your telephone
-  Use the Down arrow to open the Softphone Configuration dialogue and view the settings that enable Navigate to run as an IP soft phone
-  Mute the current call (IP soft phone only)
-  Mute is turned on. Your caller cannot hear you but you can hear your caller. (IP soft phone only)
-  Display the Login dialogue box to enable you to either log in or out of a Group, or log into as another User.
-  Open the Favourites window to view your Park slot icons and Favourites
-  View and manage your Calls History and voicemail messages
-  The Messages icon will be replaced by the Missed Call icon if you have received a missed call. Click on this icon to view your Calls History and the Messages icon will return.
-  The Messages icon will be displayed with a red circle in the background and with a telephone handset if you have missed a call and have received new voicemail messages. Click on this icon to view your Calls History and the Messages icon will return.
-  Use this list box to view all entries in your Calls History or just your voicemail message
-  Record a memo
-  Record a daily greeting
-  Record a permanent greeting











Call Status - Incoming Call

-  Answer the incoming call.
-  Hang up the incoming call. The call will be passed to your Forward on Busy number (if set) or to voicemail (if enabled) or cancelled.








Call Status - Answered Call

-  Hang up the call.
-  Put the call on hold.
-  Record the current call.
-  The call is currently being recorded
-  Add a note to the call which will be displayed in the Call Information window.
-  Display the Keyboard window to enable you to enter additional digits when presented with an auto attendant, for example.
-  Park the call in your first available Park slot.







Call Status - Multiple calls

-  Hang up the currently connected call, indicated by the green icon .
-  Put the current call on hold
-  Transfer - connect the two calls displayed in Call Status.
-  Record the current call.
-  The call is currently being recorded
-  Add a note to the call which will be displayed in the Call Information window.
-  Switch - toggle between the two calls displayed in Call Status.
-  Create a 3-way conference with the two calls displayed in Call status.
-  You are currently in a conference call with your two calls









Directory search

-  Users Filter - display the list of the User accounts on your telephone system allowing you to quickly and easily call a colleague.
-  Departments Filter - display the list of Departments configured on your maximiser system that will allow your call to be routed efficiently to a group of Users.
-  Contacts Filter - display the list of external contacts entered on your telephone system allowing you to quickly and easily make calls to customers, suppliers, etc. The search will be made within the Name column.
-  Favourites Filter - display your personal list of regularly used telephone numbers stored in your User account.
-  Company Filter - display the list of external contacts entered on your telephone system allowing you to quickly and easily make calls to customers, suppliers, etc. The search will be made within the Company column.
-  Enable Outlook Contact Lookup – enable the search within your Outlook contacts (if enabled on your User account)
-  Enable Outlook Calendar Lookup – enable integration with your Outlook Calendar to set Do Not Disturb when you have appointment scheduled as Busy, and enable your Out of Office message if you have relevant text in the body of your appointment.

Calls History

-  Signifies an answered incoming call
-  Signifies an unanswered (or missed) incoming call (up to 10 displayed, then the oldest will be deleted)
-  Signifies an answered outgoing call
-  Signifies an unanswered outgoing call
-  Signifies a new or unread voicemail message
-  Signifies an old or read voicemail message

Listening to a voicemail message

-  Delete - delete the message permanently
-  Forward Message - forward the message to a colleague(s)
-  Play Message - listen to the message again
-  Save Message - save the message until manually deleted
-  Rewind Message – rewind the message by 2 seconds
-  Fast Forward Message – forward the message by 2 seconds
-  Skip Back Message – listen to the previous message
-  Skip Forward Message – listen to next message

Index

- Account Codes, 7
- add a note
 - during a call, 11
 - to a contact during a call, 31
- ambiguous number, 36
- announced transfer, 9
- answer a call, 7
 - answer a department call, 26
- auto attendant
 - entering numbers while on a call, 7
- black list callers, 21
- blind transfer, 10
- broken dial tone
 - do not disturb, 45
 - follow me, 40
 - voicemail, 59
- busy lamp field
 - favourites, 48
 - users directory, 23
- call bar, 3
- call forwarding, 40
- call pick up, 53
- call waiting, 38
- calls history, 18
 - black list callers, 21
 - column width, 19
 - departments, 27
 - messages filter, 61
 - missed calls, 19
 - nuisance calls, 21
 - redial a number, 19
 - ring back a caller, 19
 - voicemail, 59
- calls list, 18
- cli matching
 - via a favourite, 49
 - via a User's personal numbers, 47
- column width
 - calls history, 19
 - directory, 16
- company filter, 15, 29
- completion codes, 69
- conferencing
 - cancel a conference call, 14
 - create a conference call, 14
 - end a conference call, 15
- contacts, 29
 - add a note, 33
 - add a note during a call, 31
 - ambiguous number, 36
 - amend a note, 34
 - amend contact details, 33
 - contacts directory, 29
 - create a contact, 34
 - create a contact from Calls History, 35
 - delete a contact, 36
 - delete a note, 34
 - make a call to a contact, 30
 - outlook integration, 36
 - receiving a call from a contact, 30
 - transfer a call to a contact, 30
 - view a note, 33
 - view contact details, 32
- contacts filter, 15, 29
- departments, 26
 - calls history, 27
 - groups, 26
 - log in or out of a group, 28
 - make a call to a department, 26
 - receiving a department call, 26
 - transfer a call to a department, 27
 - voicemail, 67
 - wrap up time, 26
- departments filter, 15
- directory, 15
 - column width, 16
 - company filter, 15, 29
 - contacts directory, 29
 - contacts filter, 15, 29
 - departments, 26
 - departments filter, 15
 - favourites filter, 15
 - users directory, 23
 - users filter, 15
- do not disturb, 45
 - exception number, 46
 - outlook integration, 47
- end a call, 8
- extension anywhere, 57
- external ring tune, 55
- favourite groups, 51
- favourites, 4, 48
 - amend a favourite, 51
 - assign a short code, 53
 - busy lamp field, 48
 - call pick up, 53
 - cli matching, 49
 - create a favourite, 49
 - create park icons, 54
 - delete a favourite, 51
 - favourite groups, 51
 - favourites on top, 72
 - favourites window, 3, 49
 - make a call using a favourite, 50
 - prioritising favourites, 52
 - remove park icons, 55

- transfer a call using a favourite, 50
- favourites filter, 15
- favourites on top, 72
- follow me, 41
 - broken dial tone, 40
- forward on busy, 42
- forward on no answer, 43
- forwarding calls, 40
- grouping favourites, 51
- groups, 26
 - log in or out of a group, 28
- hang up a call, 8
- hold, 9
- home number, 47
- hot desk code, 73
- hot desk number, 73
- hot desking, 4, 70
- icons in brief, 75
- internal ring tune, 55
- ip address, 73, 74
- ip soft phone configuration, 73
- log in/out
 - hot desking, 70
 - log in or out of a group, 28
 - log in or out of Navigate, 70
- make a call, 6
 - to a contact, 30
 - to a contact's alternative numbers, 31
 - to a department, 26
 - to a user, 23
 - to a user's personal numbers, 25
 - using a favourite, 50
 - using the directory, 16
- menu bar, 2
- missed calls, 18, 19
 - department calls, 27
 - status bar, 19
- mobile number, 47
- mute a call, 8
- Navigate configuration
 - favourites on top, 72
 - park icon label, 71
 - partner configuration, 72
 - set up information, 74
 - softphone configuration, 73
- not available codes, 69
- nuisance calls, 21
- out of office message, 43
 - outlook integration, 44
 - voicemail greeting, 64
- outlook integration
 - contacts lookup, 36
 - do not disturb, 47
 - out of office message, 44
- park a call, 13
 - create park icons, 54
 - park icon label, 71
 - pick up a parked call, 13
 - remove park icons, 55
 - transfer a parked call, 13
- park icon label, 71
- park icons, 53
- partner configuration, 72
 - hot desk code, 73
 - hot desk number, 73
 - ip address, 73, 74
 - partner login code, 73
 - port, 73
- partner login code, 73
- PCS range, 5
- pick up a call, 53
- port, 73
- prioritising favourites, 52
- quick settings bar, 3, 42, 44, 46
- record a call, 66
- record a memo, 66
- redial a number, 19
- reject a call, 8
- ring back a caller
 - calls history, 19
 - voicemail, 65
- ring tunes, 55
 - amend a ring tune entry, 57
 - assign a ring tune to calls to your extension, 56
 - assign a ring tune to department calls, 56
 - assign ring tune for follow me, 57
 - assign ring tune to an incoming number, 56
 - delete a ring tune entry, 57
 - external ring tune, 55
 - internal ring tune, 55
 - system ring tune, 57
- set up information, 74
 - ip address, 74
 - logged in extension, 74
 - logged in user, 74
 - software version, 74
- short codes
 - favourites, 53
- softphone configuration, 73
- software version, 74
- status bar, 2, 3
 - agent call data, 69
 - departments, 28, 67
 - missed calls, 19
 - voicemail, 59
- title bar, 2
- tool bar, 3
- transfer a call, 9
 - to a contact, 30
 - to a department, 27
 - to a user, 24
 - to voicemail, 66

- using a favourite, 50
 - using the directory, 16
- unannounced transfer, 10
- user account, 1
- user configuration, 38
 - call forwarding, 40
 - call waiting, 38
 - do not disturb, 45
 - extension anywhere, 57
 - favourites, 48
 - follow me, 41
 - forward on busy, 42
 - forward on no answer, 43
 - out of office message, 43
 - park icons, 53
 - personal numbers, 47
 - quick settings bar, 42, 44, 46
 - ring tunes, 55
- users directory, 23
 - busy lamp field, 23
 - make a call to a contact's alternative numbers, 31
 - make a call to a user, 23
 - make a call to a user's personal numbers, 25
 - transfer a call to a user, 24
 - user details, 25
- users filter, 15
- vision, 69

- completion codes, 69
 - not available codes, 69
 - status bar, 69
- voicemail, 4, 59
 - assistant telephone number, 64
 - delete a message, 61
 - departments, 67
 - divert incoming call to voicemail, 59
 - forward a message to a colleague, 62
 - forward a message to a colleague's email, 62
 - forward a message to multiple colleagues, 63
 - information window, 60
 - leave a message, 65
 - listen to a message, 59
 - message handling, 61
 - messages filter, 61
 - receive a message, 59
 - record a call, 66
 - record a daily greeting, 63, 64
 - record a greeting, 63
 - record a memo, 66
 - ring back a caller, 65
 - status bar, 59
 - transfer a call to voicemail, 66
- voicemail information window, 60
- wrap up time, 26



SpliceCom

Britain's leading developer of telephone systems

The Hall Farm Business Centre, Berry Lane, Chorleywood, Hertfordshire WD3 5EX Tel: 01923 287700 Fax: 01923 287722
Email: info@splicecom.com Website: www.splicecom.com