



# ACCESSLINE | TELEDesk™

## USER GUIDE

Windows Version



## WELCOME

Welcome to AccessLine's TeleDesk, a powerful tool that helps you easily manage your communications right from your PC. TeleDesk seamlessly integrates the features of AccessLine and presents them as an easy to use computer interface.

With the power of TeleDesk, you will be notified of incoming calls, identify who they are (before the phone even rings), be notified of voicemail and faxes and have the ability to take calls on behalf of other users. TeleDesk gives you more time to do business instead of sifting through meaningless phone calls, voicemails, and faxes.

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## FEATURES

TeleDesk will:

- Notify you of incoming calls, and let you redirect the call as needed
- Automatically redirect calls from specific callers for you
- Display the number of new faxes
- Display the number of new voicemail messages
- Allow you to direct incoming calls to different locations, other people, or your voicemail
- Enhance caller ID by integrating with Microsoft Outlook 2000
- Enable multiple TeleDesk users to work cooperatively and manage calls as a community
- Allow you to instant message any other TeleDesk user
- Allow you fast access to your AccessLine Web interface to listen to messages and view faxes
- Integrate with your Outlook 2000 Calendar and contact list

## SYSTEM REQUIREMENTS



- Internet access
- Windows 98, 2000, XP OS
- Microsoft Outlook 2000 (Optional)
- 5 MB of hard drive space
- Latest version of Java Virtual Machine\*

\*If you do not have Java Virtual Machine on your PC, you will be provided with a link during the installation process to download the latest version.

## INSTALLING ACCESSLINE TeleDesk

### Downloading TeleDesk

By now you have probably downloaded TeleDesk from the Web. If not, please go to [www.accessline.com/TeleDesk](http://www.accessline.com/TeleDesk). Click Download AccessLine TeleDesk. Make a note of where you select to save it to on your PC.

### Installing TeleDesk

Once you have successfully downloaded TeleDesk from the Web:

1. Open the TeleDesk file from the directory you selected.
2. Follow the onscreen instructions and click the Finish button when ready.

The InstallShield Wizard should handle any configurations necessary for the installation of TeleDesk. If your PC is not already equipped with a Java Virtual Machine, the InstallShield may require you to download one.

To download this please visit [www.accessline.com/TeleDesk/mvm/msjvax86.exe](http://www.accessline.com/TeleDesk/mvm/msjvax86.exe). If problems do occur during the installation process, please contact Customer Service at 1-877-880-0055 for assistance.

## OPENING ACCESSLINE TeleDesk

Once TeleDesk has been successfully installed:

1. Connect to your Internet Provider.
2. Go to your Start menu.
3. Select Programs.
4. Select AccessLine Communications.
5. Select TeleDesk.

TeleDesk will prompt you to log on.

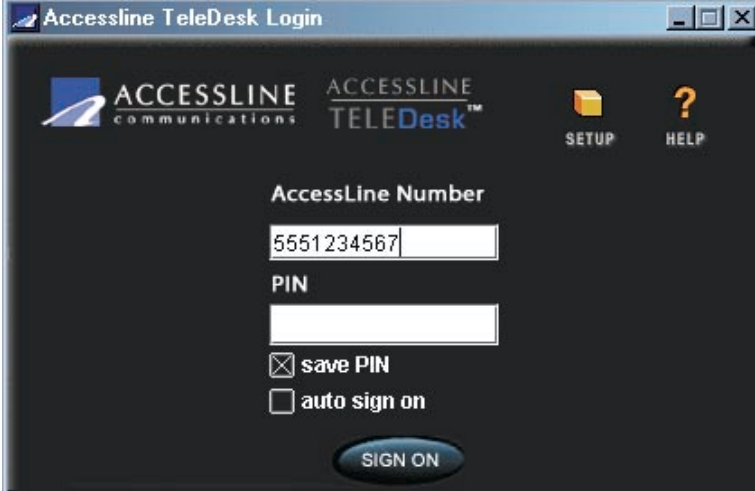
**Note:** Your connection to the internet through your ISP will remain active as long as the TeleDesk program is running.

## LOGGING ON

The Logon Screen will appear each time TeleDesk is started.

**Step 1** - Enter your AccessLine number without spaces or dashes as well as your PIN (the same one you use when calling from a phone) in the appropriate fields.

**Step 2** - Click the Sign On button to begin using TeleDesk.



Accessline TeleDesk Login

ACCESSLINE communications ACCESSLINE TELEDesk™

SETUP HELP

AccessLine Number

5551234567

PIN

save PIN

auto sign on

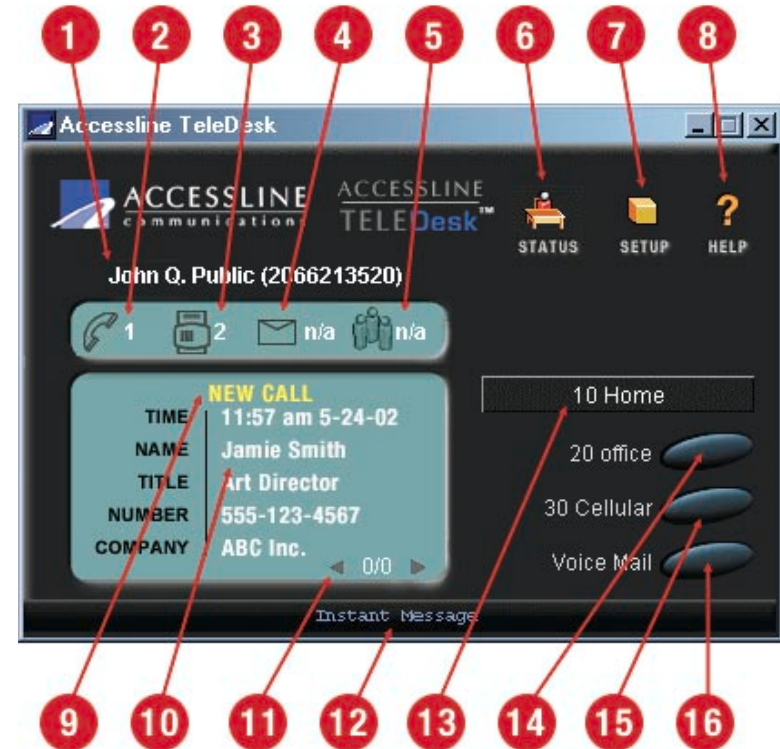
SIGN ON

**Note:** If you check the Auto Logon and Save PIN fields, TeleDesk will automatically start running upon startup of your computer.

## QUICK TOUR OF ACCESSLINE TeleDesk

Before using TeleDesk, it is a good idea to become familiar with the many features seen on the main TeleDesk screen. Key features and important details of TeleDesk are identified on the TeleDesk main screen below:

1. Current user logged into Teledesk.
2. Number of new voicemail messages.
3. Number of new faxes.
4. Number of new email.
5. Number of conference calls pending.
6. Current user's status.
7. Set up options and TeleDesk preferences.
8. TeleDesk Help guide.
9. Call status.
10. Caller ID and information.
11. Call history counter.
12. Instant messaging.
13. Current active extension.
14. User defined Quick Direct button.
15. User defined Quick Direct button.
16. User defined Quick Direct button.



## QUICK TOUR OF ACCESSLINE TeleDesk (cont.)

### Important Information:



#### Quick Direct Buttons

The Quick Direct Buttons are used to direct callers to pre-selected destinations or locations in the event of an incoming call. Each Quick Direct Button represents an Extension (Example: Extension 20 designates your office) within your AccessLine. To set up your Quick Direct buttons, right click on the button and select an Extension from the drop-down menu.



#### Active Extension

This is the location to which all your incoming calls are directed. Your Active Extension can be changed at any time by clicking on the button and selecting from the list of Extensions

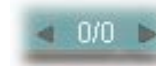


#### Caller ID

TeleDesk not only notifies you of an incoming call before your phone rings, but it also identifies who is calling you by displaying the phone number of the caller. Caller ID can be enhanced to display the caller's name, company, and job title through TeleDesk's integration with your Microsoft Outlook 2000 contact information. (See page 11 - Outlook Integration.)

Blocked calls

If <Private> appears in place of a phone number, the caller's number is blocked, therefore TeleDesk will be unable to display the number.



#### Call History

TeleDesk tracks and lists all calls and messages into your AccessLine since you logged in. You may choose to scroll through the Call History list by using the right and left arrows. The call and message list automatically resets to zero once you have logged out.



#### Quick link to the Web

Clicking on the phone or fax icon acts as a shortcut to the AccessLine Web site, a automatically logging you in and allowing you to listen to messages or view faxes quickly, sometimes faster than you can check messages through your phone.



#### Attendant

While using TeleDesk's Attendant Mode, the name and status of the Attendant you are currently working with appears. (See section 3.5 - Attendant Mode.)

# SET UP OPTIONS

## General

The Setup screens allow you to customize your TeleDesk configuration. The General Setup will be the first screen visible when you enter into the Setup menus. From here logon options are available as well as access to the other Setup menus.

**Auto Logon** - TeleDesk automatically starts when your PC logs on.

**Save PIN** - Your Personal Identification Number is saved on your behalf. This must be checked in order for Auto Logon to work properly.

**Start Minimized** - When TeleDesk logs on, it will start in a minimized state and be visible only from the windows system tray located in the lower right corner of your desktop.

**Organizer Profile** - The Profile is set up during installation of the TeleDesk program.

**Organizer Password** - The Password is set up during installation of the TeleDesk program.

## Notification

The Notification Setup screen is used to determine how TeleDesk will present notification of inbound calls, faxes, voicemail, and other TeleDesk functions to you.

The notification options available are:

**Call Control** - Alerts you when a new call comes in.

**Voicemail** - Alerts you when a new voicemail arrives.

**Fax** - Alerts you when a new fax arrives.

**Email** - Alerts you when a new email arrives.

**Connection Call** - Alerts you for a Connection Call.

**Play Sound** - Use sound effects to notify you of an incoming call, fax, voicemail or any other type of event.

**Send to Top** - Notifies you by sending the TeleDesk window over all other programs in the event of a call, fax, or voicemail or any other type of event.

**Change Icon** - The TeleDesk icon in the system tray (lower right corner of your desktop) changes as the result of incoming calls, faxes, voicemail or emails or a status change.

**History** - Select the number of events (calls, faxes, voicemail) to log before writing over the oldest.

**Select Sound Files** - TeleDesk provides a host of sound files from which you can choose in order to modify the TeleDesk notifications. To change sound files:

1. Go into the Setup menu.
2. Select Notification.
3. Click on the Select Sound Files button.
4. Click Test to hear the current sound for that event.
5. Click the (...) button to locate a new sound.
6. From here, access to the various sound files is available.

## SET UP OPTIONS (cont.)

### Proxy

The Proxy Setup is used to help establish communications from a secured network to the AccessLine network.

### Advanced

The Advanced Setup provides options for using external calendar software such as Outlook 2000.

### About

The About screen provides copyright information as well as a link to check for the latest version of TeleDesk.

### Attendant

Attendant Setup allows you to register other TeleDesk users and give them the ability to manage your calls.

### Monitor

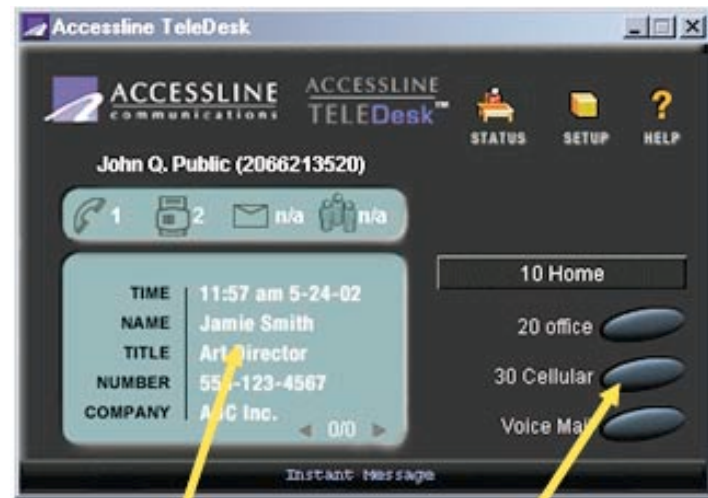
The Monitor Setup lets you choose the TeleDesk user to monitor.

## CALL MANAGEMENT

TeleDesk gives you complete control over your communications by notifying you of your incoming calls and providing options for redirecting calls to the place or phone you prefer. Upon notification of an incoming call, you can either allow it to ring through to your current location, or simply direct the call to a more appropriate location, person or your voicemail.

### Call Directing

To redirect an incoming call to any one of your phones, another person or your voicemail, use the Quick Direct Buttons. Quick Direct Buttons are located in the lower right corner of your TeleDesk. Before using your Quick Direct Buttons, you must first set them up. This is simple and quick and you can change them at anytime.



Notification of an Incoming Call

Click any of the buttons to direct the call elsewhere

## CALL MANAGEMENT (cont.)

To set up or change the Quick Direct Buttons:

1. Right click on the specific Quick Direct Button you wish to change or set up. (You don't have to use all three.)
2. When the drop-down menu appears, scroll up or down to highlight the appropriate Extension. If you wish to create a temporary Quick Direct Button, select Custom. (Extensions with call screening will not be available.)
3. Left click to select the Extension or phone number.
4. The newly selected Extension will now be located next to the corresponding Quick Direct Button.

Once your Quick Direct Buttons are set up, you can begin using them to direct your calls. To direct a call with the Quick Direct Buttons:

1. TeleDesk will notify you that you have an incoming call.
2. At any time before the call is answered, left click on the appropriate Quick Direct Button to direct a call to the location you desire. Your incoming call notification will alert you that the call has been redirected.

Example:

*Your calls are being sent to your office, and TeleDesk notifies you that a call is coming in from a person you just don't have time to talk to. Simply use one of your Quick Direct Buttons to send that caller to your voicemail or to someone else.*

## Changing your Active Extension

Quickly and easily change your Active Extension right from your TeleDesk.

To change the Active Extension:

1. Left click on the Active Extension button.
2. Scroll up or down and highlight the appropriate Extension to make active.
3. Left click to select the Extension and make it active.

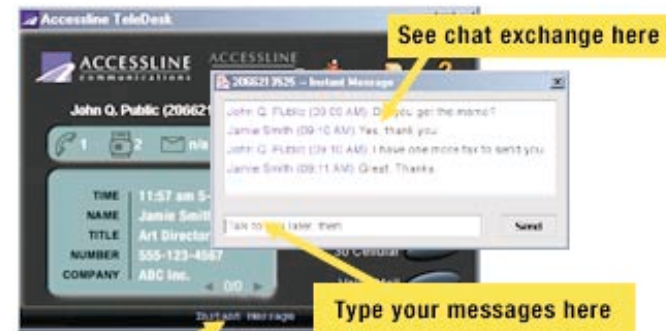
## INSTANT MESSAGING

AccessLine TeleDesk allows you to send text messages, or "Instant Message" with other AccessLine TeleDesk users. This is especially useful when you have a quick question or are already on the phone with someone else. In order to initiate an Instant Message with another AccessLine user first you must add them to your list.

### Setting up your Instant Messaging

1. Click Setup
2. Click IM
3. In the AccessLine Number field, enter the AccessLine number of the person you wish to be able to Instant Message
4. In the Name field, enter the person's name
5. Click Add.

To enter multiple people to your list, repeat steps 3, 4 and 5



**Click on Instant Messaging  
(choose a person  
from your list in the  
drop-down menu)**

## INSTANT MESSAGING (cont.)

### Receiving Instant Messages

The "Allow to contact me" section lets you choose who you want to receive an Instant Message from. You may choose to receive an Instant Message from any other AccessLine TeleDesk user by selecting "All users" or choose to only receive Instant Messages from people you have added to your list by selecting "Only those on list."

### Sending an Instant Message

To send an Instant Message to someone on your list:

1. Click on the words "Instant Message" at the bottom of your AccessLine TeleDesk.
2. Select from the list, the person you wish to send the Instant Message to.
3. At the cursor in the new window, enter the text of the message you wish to send.
4. Press enter or click Send.

## ATTENDANT MODE

TeleDesk Attendant Mode allows TeleDesk users to work together. In Attendant Mode, users may manage each other's calls and redirect any incoming calls on behalf of any other user. By registering another TeleDesk user as an Attendant, you grant them permission at any time to be able to manage and take your calls.

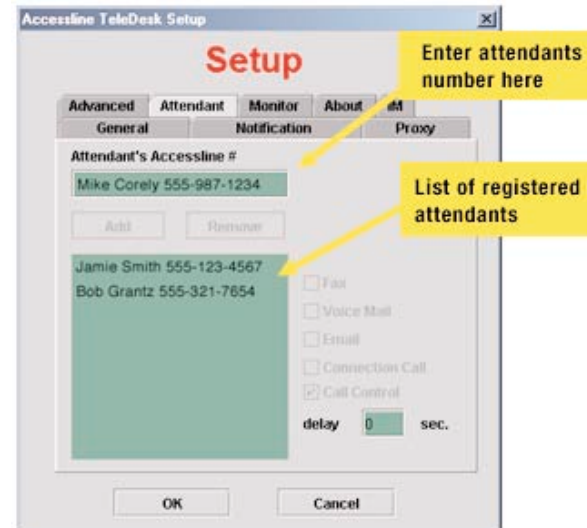
### Set up an attendant

The first step in initiating Attendant Mode is to register your Attendant(s). Once registered, Attendants can begin monitoring your calls and act on your behalf. To register an Attendant:

1. Go into the Setup menu.
2. Select Attendant.
3. Enter in the Attendant's 10-digit AccessLine Number.
4. Select Add.
5. Click OK.

Setting up your Delay timer:

The Delay timer is used to create a window of time in which you can choose to take or redirect an incoming call before your Attendant may act on that call. To set the Delay, enter the number of seconds you wish in the Delay field. For example: Enter 3 for 3 seconds.



## ATTENDANT MODE (cont.)

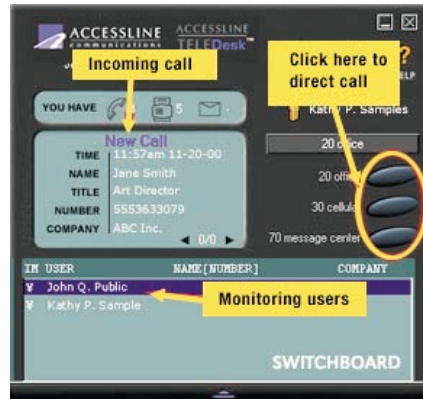
### Monitoring Calls

You may monitor and redirect calls on behalf of anyone who has set you up as an Attendant. You may monitor as many other users as you wish.

To begin monitoring calls:

1. Go into the Setup menu.
2. Select Monitor.
3. Highlight a name from the Available to Monitor List. (Only users who have entered you into their Attendant list will be presented as an option.)
4. Click on the Add button.

Once these steps are completed, the Switchboard will appear. The Switchboard acts as tool for notifying you as to which user an incoming call is for. When a call comes in for an individual that you are monitoring, their name will be highlighted within the Switchboard. Your name will be highlighted when the call is for you.



Monitoring calls for other users also requires the use of the Quick Direct Buttons. The Quick Direct Buttons for the individual you are monitoring must be set up prior to directing their calls. This is done the same way you set up your own Quick Direct Buttons.

To direct a call for someone else:

1. As the call comes in, their name will be highlighted within the Switchboard.
2. Click on the appropriate Quick Direct Button to direct the call to any of your locations or their voicemail.

### Status

TeleDesk alerts your Attendants to your current status. You may choose Active, Away, or Do Not Disturb. This will alert them as to your current availability. The status icon on their TeleDesk will change based on your status. To change your status:

1. Left click on your status icon.
2. Scroll up or down and highlight the status to select it.
3. Left click again.

You also have the option to attach a customized message to your selected status. To customize your status:

1. Right click on the status icon.
2. Scroll down to Add Message and click.
3. Create Custom Message appears.
4. Select a status.
5. Type in the customized message.
6. Click OK.



Select a status type

Type Message here

## OUTLOOK 2000 INTEGRATION

By integrating with Microsoft Outlook 2000, TeleDesk gains additional abilities to help you manage the flow of incoming calls.

### Contact List Caller ID

TeleDesk takes information from your Microsoft Outlook 2000 contact list and integrates it with the Caller ID. When someone, who is in your contact list, calls your AccessLine, additional information such as name, company, and job title is displayed- allowing you to more effectively handle that call.

### Change your active extension

Your AccessLine TeleDesk will install a new menu item in your Microsoft Outlook tool bar. You can now redirect your calls right from Outlook. To change your active extension, click on the drag down box and select an extension from the list. The change takes place immediately.

### Event Scheduling

When scheduling a meeting or event using the Outlook Calendar, a space is provided within the Appointment Setup screen to select an Extension or phone number you wish to activate for the duration of that event. At the time of that scheduled event, all calls to your AccessLine will be directed to the Extension you have selected. You may also set up default Extensions in the Advanced screen within the Setup menu, which will automatically activate for all events.

To set a Default Extension for Event Scheduling:

1. Enter the Setup menu.
2. Click on Advanced.
3. Select default Extension or phone number, where you wish your calls to go during that event.
4. Select an Extension you wish to activate when the event is finished. Selecting Previous Setting sets it to whichever Extension was active before the event.
5. Left click OK.

### Auto call Forwarding

Auto Call Forwarding is designed to automatically direct your calls based on who's calling. You may have TeleDesk activate specific Extensions for specific callers. You control this function through your Outlook contact list.

To set up Auto Call Forwarding:

1. Using Microsoft Outlook 2000, go into one of your contact's information.
2. Left click on the arrow next to a blank phone number field.
3. Scroll down and highlight Call Back.
4. Left click again.
5. Left click in the Call Back field.
6. Enter the 2-digit Extension number, or any phone number you wish activated when that contact calls.
7. Select Save and Close.










Example:

You always want Sarah Johnson, a highly valued customer, to reach you directly on your cell phone regardless of how you have your calls directed or where you are. By setting up your Auto Call Forwarding, TeleDesk will always send her to your cell phone provided she is calling from one of the numbers in your contact list.

# SCREEN ICONS





## System Tray Icons

The following icons will appear in your system tray based on various events with your TeleDesk.

-  TeleDesk Active.
-  TeleDesk Inactive.
-  Incoming call.
-  Fax received.
-  Email received.
-  Instant message sent/ received.
-  Voicemail received.
-  TeleDesk not connected to server.
-  New voicemail, fax, or email received before logging on to TeleDesk or an important announcement from AccessLine Communications.

## Status Icons

The status icons display your current status. You may change your status at anytime.

-  STATUS Active.
-  STATUS Away.
-  STATUS Do Not Disturb.
-  User Status Unknown.

## UNINSTALLING ACCESSLINE TeleDesk

### How to uninstall

TeleDesk can be removed from your PC by following these steps:

1. Go into the Start Menu.
2. Select Settings.
3. Select Control Panel.
4. Click on Add/Remove Programs.
5. Highlight TeleDesk.
6. Select Add/Remove.
7. When prompted, click OK.

## GETTING HELP

TeleDesk comes with a fully equipped with a detailed Help Guide. Click the help icon and an extensive help section will become available.

Still have other questions or concerns in regards to TeleDesk or any other AccessLine product? We can be reached 24 x 7 at 1-877-880-0055.