



BT Cloud Work Desktop App.

User Guide



Contents

Welcome	4	Updating your personal contacts list	17
		Add a contact	17
Supported languages	5	Edit a contact	17
Fax templates	5	Delete a contact	17
Product tour	6	Make a call	18
Product tour (continued)	7	Caller ID	18
Product tour (continued)	8	HD voice and secure call indicators	19
		VOIP unavailable	19
Download and install the app	9	Call management	20
System requirements	9	Answer a call	21
PC	9	Pick up the call	21
Mac	9	Respond with a courtesy message	22
How to log in to BT Cloud Work Desktop App	10	To respond with a prepared message	22
		To respond with a custom message	22
		To respond to an urgent request	22
		Screen voicemail	23
		Screen the call	23
		Send the call to voicemail	23
		Forward the call	23
		Call switch	24
Set your default number	11	Call screening	25
Favorites	12	Switchboard support	26
Contacts: add or update your contacts list	13	Call recordings	27
View your contacts	13		
Updating your contacts list	13		
Favorites: create a list of favorite contacts	14		
View your favorites list	14		
Make a contact a favorite	14		
Remove a favorite contact	14		
Google contacts integration	14		
View presence status of a favorite contact	15		
Adding a photo avatar to any contact	16		
Add an avatar	16		

Contents

View or listen to a message	28	Technical support	46
To view your messages	28		
Voicemail transcription	28	About	47
To listen to a voicemail message	29		
To view a fax	29	Head up Display (HUD)	48
Hold an audio conference call	30	HUD	48
Premium conference numbers	30	How to add extensions to the HUD	49
To hold an audio conference call	30	Manage calls with HUD	50-53
Launch an online meeting	31	HUD call monitoring	54
		Active Call Layout	55
Send or receive a fax	32	Park Locations at HUD	56
Send a fax	32	Check for updates	57
Set caller ID for faxes	33	Give us feedback	58
View your call activity records	34	Log out of BT Cloud Work Desktop App	59
Personalise BT Cloud Work Desktop App	35		
Sound menu	36		
Calls menu - general	37		
Calls menu - incoming	38		
Calls menu - outgoing	39		
Messaging menu	40		
Contacts menu			
- Integrate with Microsoft Outlook	41		
- Integrate with Mac Address Book	42		
Join now	43		
Hotkeys for Microsoft Windows	44		
Hotkeys for Mac	45		

Make it easier to communicate with colleagues and clients

The BT Cloud Work Desktop App turns your PC or Mac computer into an all-in-one communication hub. Synced to your office network, you can collaborate with your colleagues and clients anywhere you have a broadband connection and a headset.

Stay productive with fewer devices

With the App, you're good to go as soon as you log in to your computer – no matter where you are. It gives you the call handling power you expect from your desk phone, together with the communication tools you rely on most – like conferencing and Instant Messaging. Plus, it's as easy to install as it is to use.

Supported languages

The following languages are supported by BT Cloud Work from release 10.0:

- English (US)
- English (UK)
- English (Australia)
- French
- French (Canada)
- German
- Italian
- Japanese
- Portuguese (Brazilian)
- Spanish

How to set your language

Select 'New Languages' in the Regional Settings menu.

Fax templates

Fax templates for added languages are available.

- Fax templates do not support non-ASCII characters.
- Older Cisco and some Polycom (VVX101/VVX201) models may not display non-ASCII characters properly on devices.
- Characters might display improperly when using intercom and page.

Note:

Japanese and Brazilian Portuguese have not been integrated into Q365, SFDC, Zendesk, MS Dynamics, Global c2D, or Microsoft Outlook.

Product tour

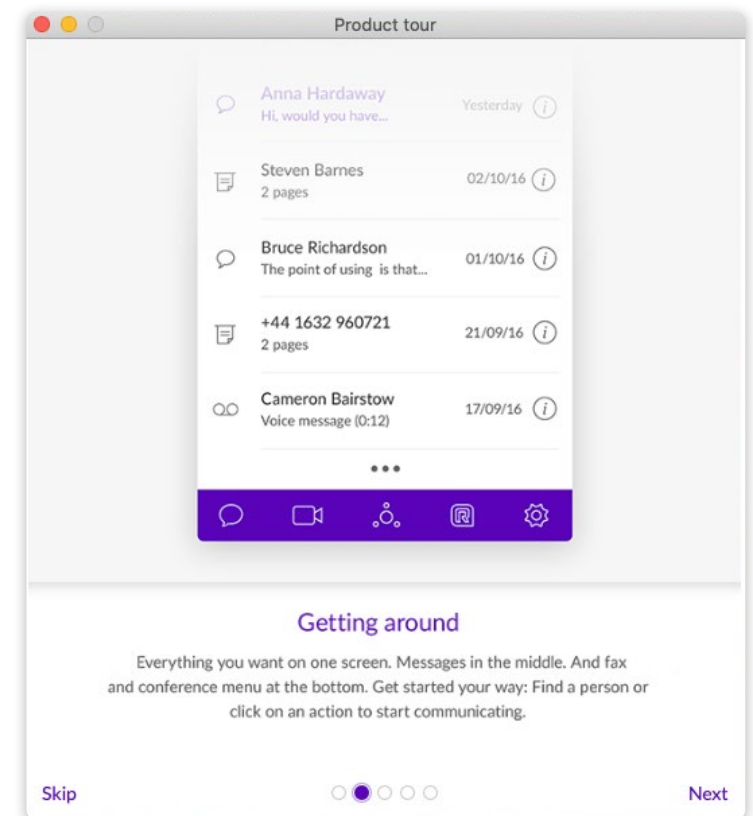
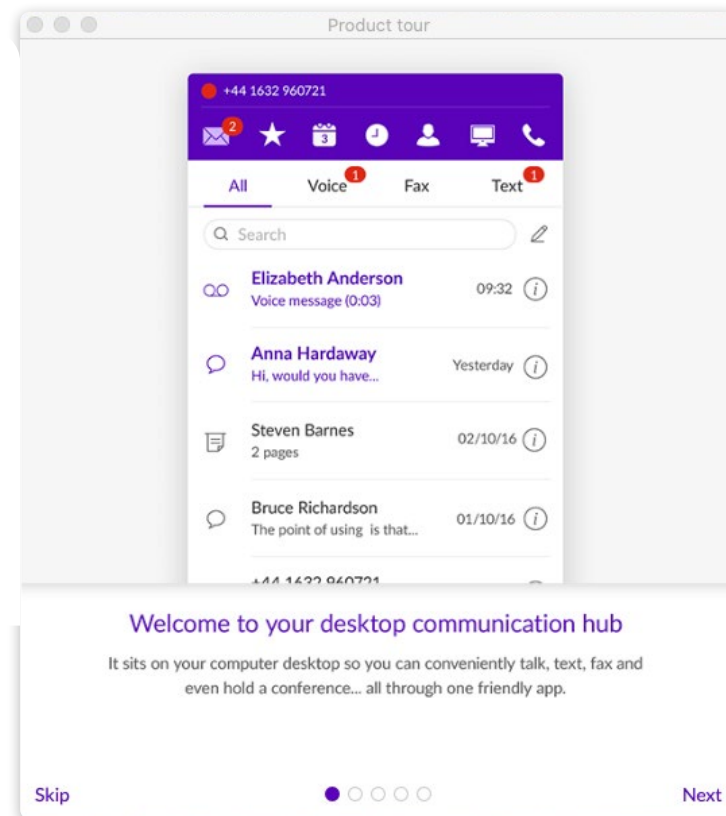
Welcome to your desktop communications hub

It sits on your computer's desktop so you can simply talk, fax and hold a conference – all through one easy-to-use app.

Getting around

Everything you want is on one screen. Messages in the middle. And fax and conferencing at the bottom.

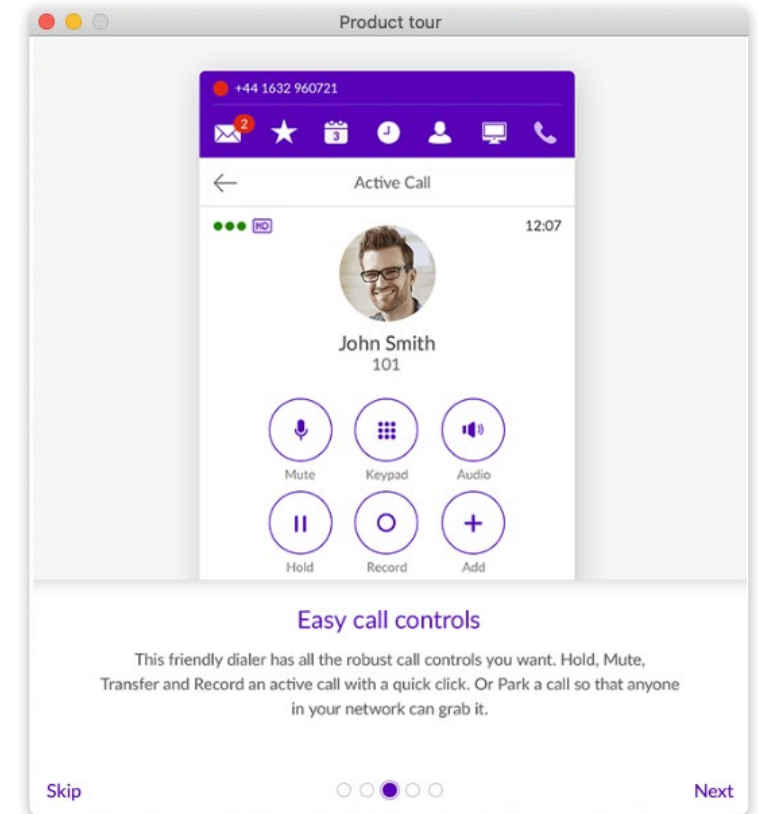
Get started your way – find a person or click an action to start communicating.



Product tour

Easy call controls

This user-friendly dialer has all you need. Hold, Mute, Transfer and Record an active call with a quick click. Or Park it so anyone in your network can grab it.



Product tour

Head Up Display (HUD)

For easy outreach and quick calls, add colleagues to your HUD list.

You can also efficiently manage calls with Call Transfer, Park, and Monitoring.

* On selected plans only.

The screenshot shows a 'Product tour' window with a HUD (Head Up Display) interface. At the top, there's a search bar labeled 'Search company'. Below it, a list of colleagues is displayed, each with their name, extension, and availability status (e.g., 'Available'). For each colleague, there are icons for 'Call from', 'Monitor', 'Call', and 'Message'. A call log on the left shows recent calls with details like 'Elizabeth A Voicemail message', 'Anny Hard Hi, would you...', 'Steven Bar 2 pages', and 'Bruce Rich The point of...'. Annotations with dashed lines point to specific features: 'Easy access to the HUD' points to the top bar; 'Monitor agent's call with just one click' points to the 'Monitor' icon; 'Hover over for a variety of options' points to the call management icons. Below the screenshot, the text reads: 'HUD Add colleagues in your HUD list for easy outreach with quick calls and texts. Manage calls for efficient call transfer, park, and monitoring. * On select plans only'. At the bottom right, there is a 'Finish' button and a progress indicator with five circles, the fourth of which is filled.

Download and install the App

It's quick and easy to get the BT Cloud Work Desktop App installed on your computer. But before you start, please check the system requirements to make sure your computer can use it.

System requirements

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

PC

- Windows 7 (or later).
- 2 GHz (32-bit or 64-bit) processor.
- Minimum 4 GB RAM (8 GB recommended).
- 400 MB free hard drive space.
- Required minimum screen resolution is 1,024 x 768.

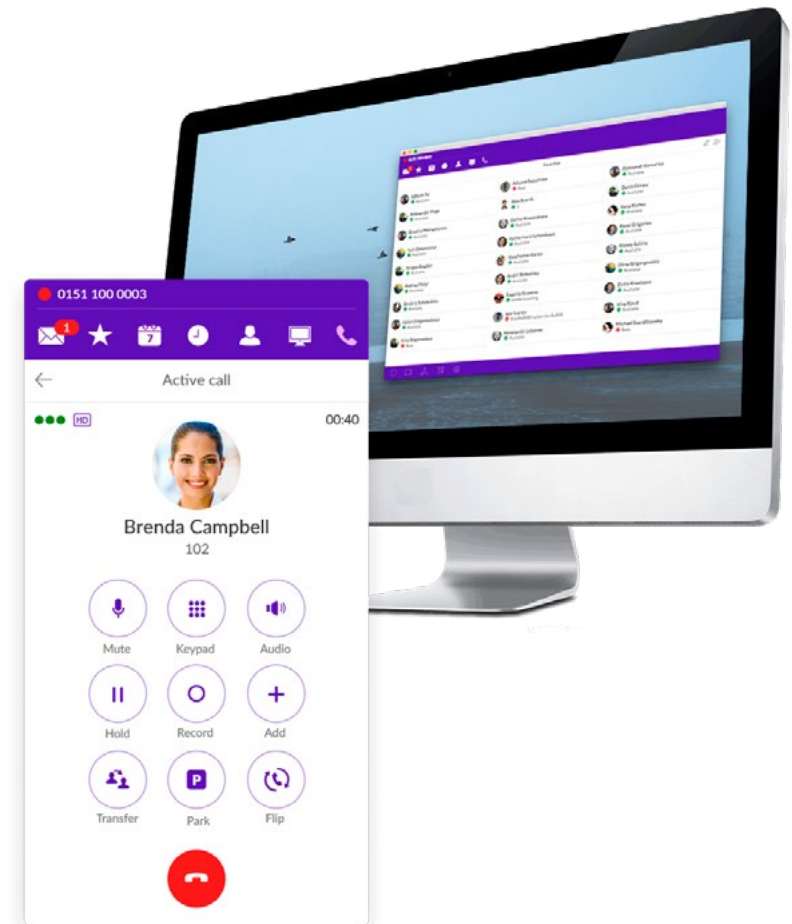
Mac

- Mac OS X® 10.11 El Capitan (or later).
- Intel processor.
- Minimum 4 GB of memory (8 GB recommended).
- 400 MB hard drive space.
- Required minimum screen resolution is 1,024 x 768.


How to download and install the App

1. Log into your BT Cloud Work online portal.
2. Go to the 'More' menu and select 'Apps and Resources', then select 'Desktop app'.
3. Download the compatible version for your computer, either PC or Mac.
4. Run the install wizard.

Now you're ready to log into the BT Cloud Work Desktop App.




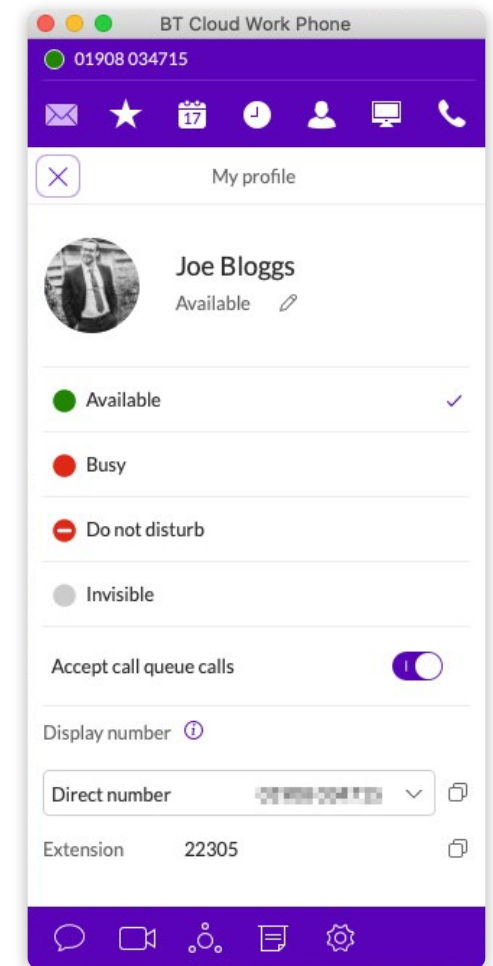
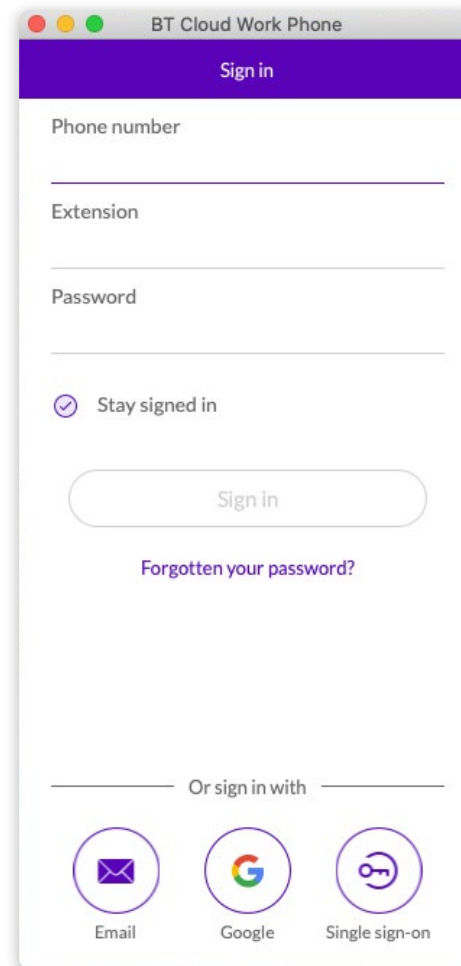
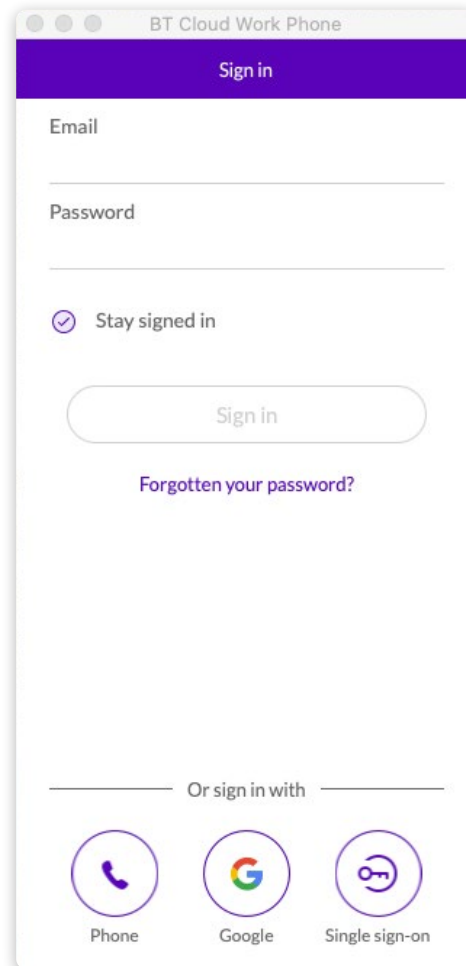
 Download for Mac

 Download for PC

Download and install the App

How to log in

1. Click  on your computer desktop.
2. Click 'Log In' or 'Single Sign On', and log in with your details to access the App and all your company applications with a single sign on.

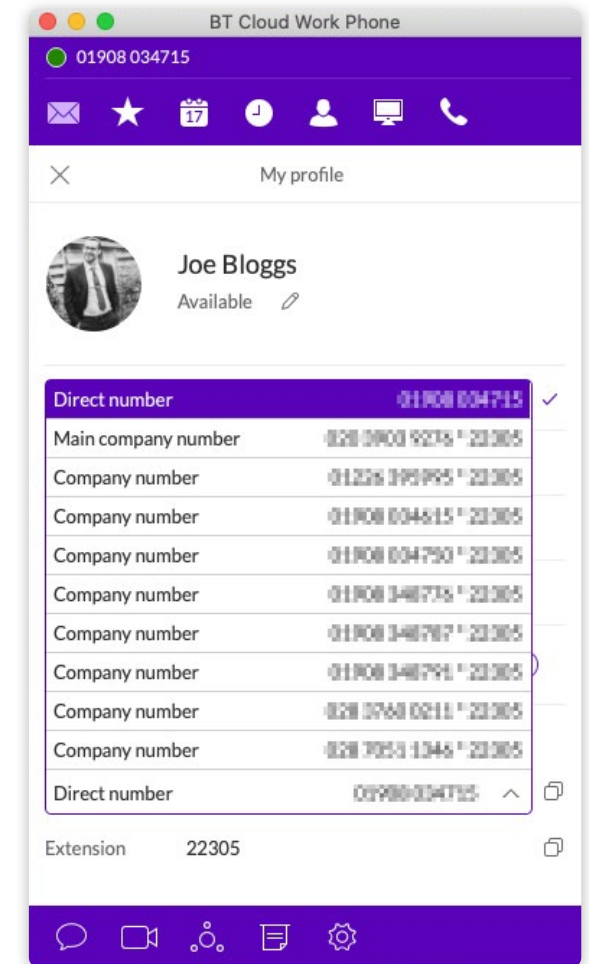
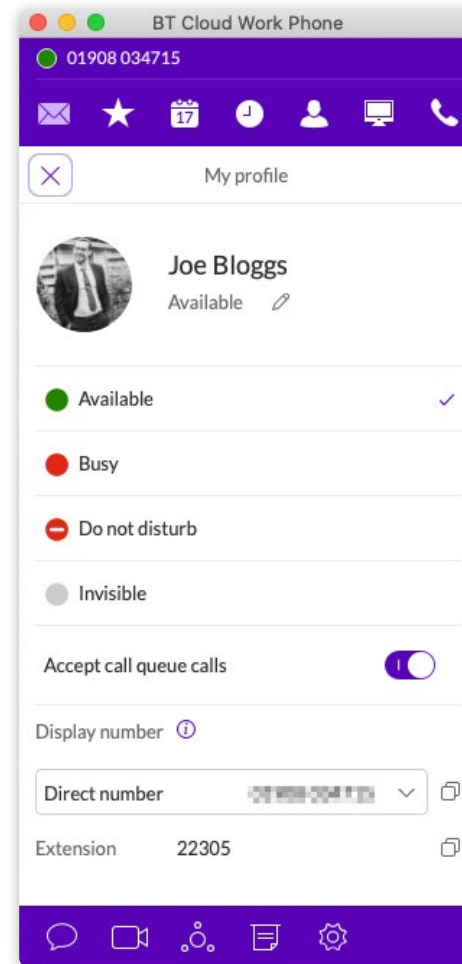


Set your Default Number

When you launch the BT Cloud Work Desktop App, it shows your Default Number.


You can choose to display your direct or company number. Here's how:

1. Click on your phone number at the top to open your profile.
2. Click 'Direct Number'.
3. Select the number from the menu you'd like to display as your direct number.



Favourites








The first time you log in, you'll land on the Favourites screen. This displays icons linked to everything you want – all on one screen.







To add a Favourite from your Contacts list, click (person icon) and select from your All, Company, Personal, or Outlook Contacts lists using this filter . You can also choose from OSX or Google contacts.

Mouse over a name (for example, Dave Richards) to reveal your Contact options – Call or Instant Message.

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

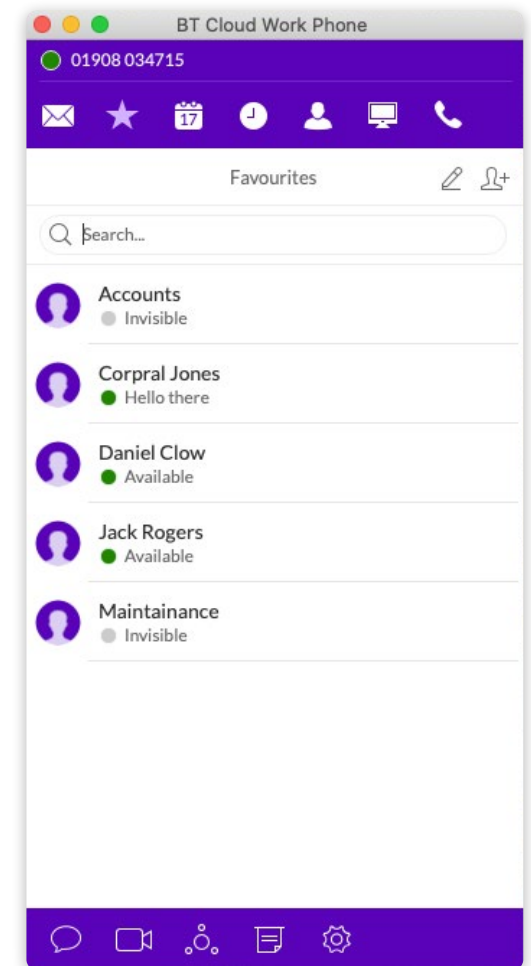
Here's a quick rundown on using the App

-  **Your Account Presence.**
Set your availability status.
-  **Messages.**
View all your Messages in one place. Messages are always current and synced from your other devices.
-  **Favourites.**
Add colleagues you contact often. See their Presence Status and contact them directly from this screen.
-  **Calendar.**
Google Calendar or Outlook. iCal if you are using a Mac.
-  **Call Log.**
Review all call activity on your account.
-  **Contacts.**
Separate Personal and Company Contact lists make it easy to quickly find the right person.
-  **Dial Pad.**
Dial a phone number to make calls from this screen.*

-  **Head Up Display (HUD).**
Provides a single interface to manage incoming calls from the desktop; views Presence Status of up to 100 users.
-  **Instant Messaging.**
Send messages to one person or a group.**
-  **Online Meetings.**
Launch video Online Meetings to collaborate and share screens with remote colleagues or clients.
-  **Audio Conference.**
Hold instant conference calls and easily invite up to seven participants.**
-  **Fax.**
Send and schedule faxes, and select cover pages from this screen.
-  **Settings.**
Set your App preferences.

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



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



Contacts: Add or update your list

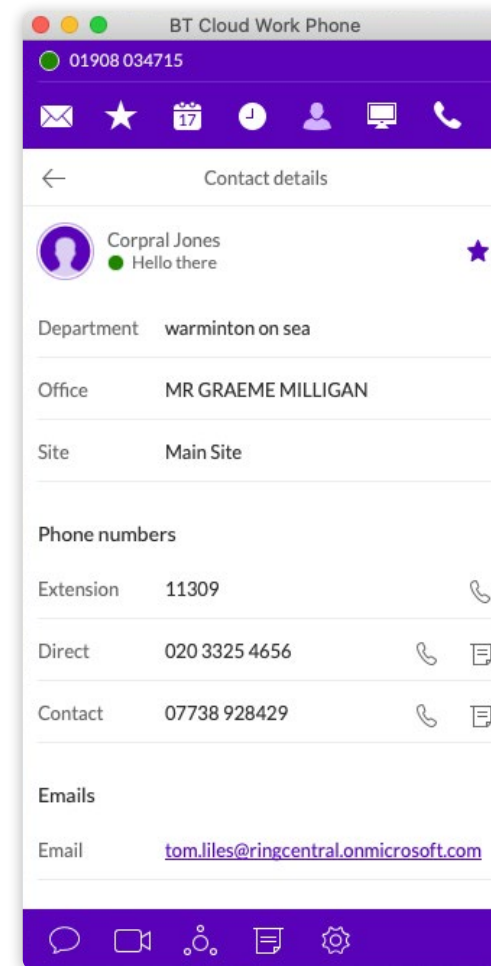
The Contacts list is your online address book. It stores your Company Contacts – everyone in your corporate directory, alongside your Personal Contacts – people outside of the company, such as friends and family. To avoid any confusion, these two lists are separate.

To view your Contacts



- At the top of the screen, click  to open your Contacts.
- Click  to select All, Company, Personal, or Outlook Contacts.
- To see their Presence Status, click on a Contact (Mr Graeme Milligan in this example).

Updating your Contacts list

You don't need to manually update your Company Contacts as your corporate directory is synced to your company's main BT Cloud Work account. This is continually updated so you always have the latest Contact information for your entire company.



Did you know?


You can call or Instant Message a person straight from your Contacts list by selecting them, then simply clicking  or .

Favourites: Create a list of your Favourite Contacts






The Favourites screen is a shortcut to your most frequently used Contacts. You can add up to 100 Contacts from your Personal or Company list. Since it's a shorter list, you can find the person you want faster.

What's more, when you add a Company Contact to your Favourites list, you can instantly see their phone Presence status, which shows if they're free to take calls.



To view your Favourites list

- At the top of the screen click 
- The Favourites screen opens, showing all of your existing Favourite Contacts.




Make a Contact a Favourite

1. At the top of the screen, click  or .
2. Click  and select Personal or Company.
3. Click the name you want to add to your Favourites list.
4. Click  next to the name. When the open star changes to a filled star , your Contact was successfully added to your Favourites list.

Did you know?

You can call or Instant Message a person straight from your Favourites list by selecting them, then simply clicking  or .

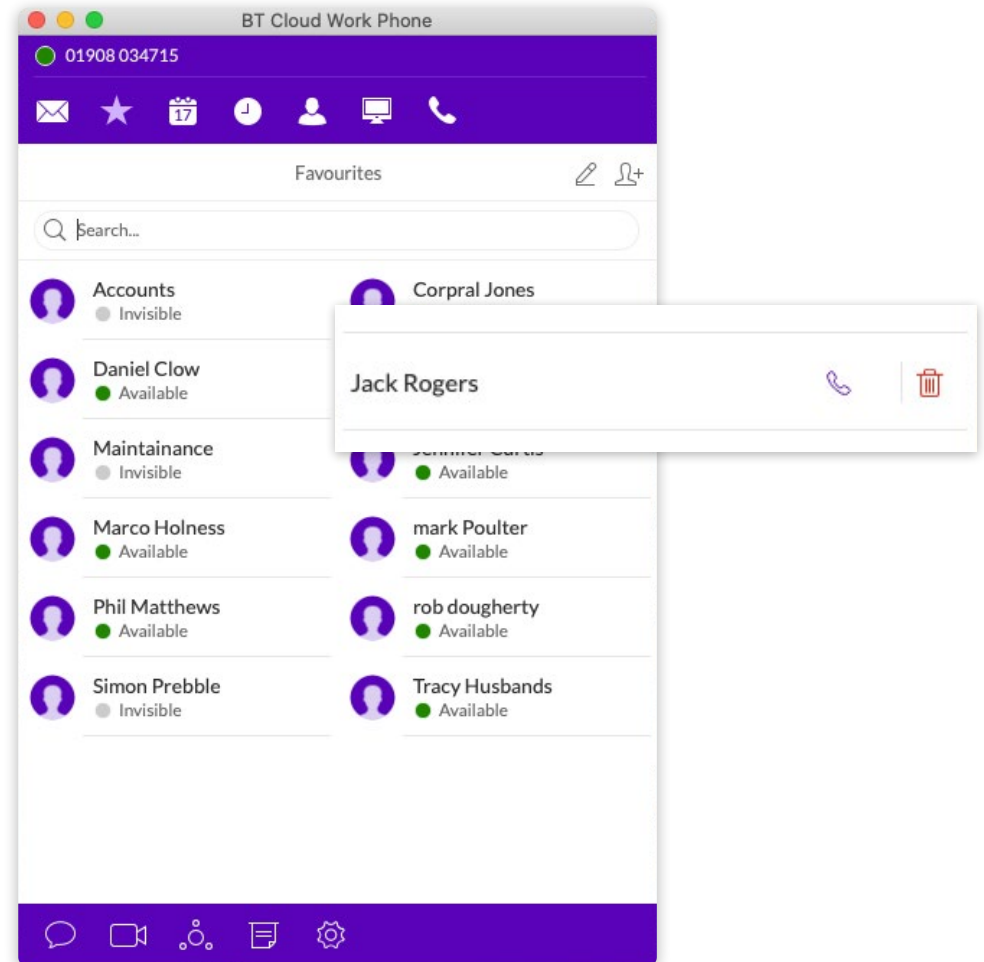
Remove a Favourite Contact

1. At the top of the screen, click .
2. Click  at the top right of the screen.
3. Find the person you want to remove and click  next to the name.

The Contact is removed from the screen, but you can still find them in your Personal or Company list.

Google Contacts Integration






View your Google Contacts from inside the BT Cloud Work Desktop App or select and move Google contacts one at a time.

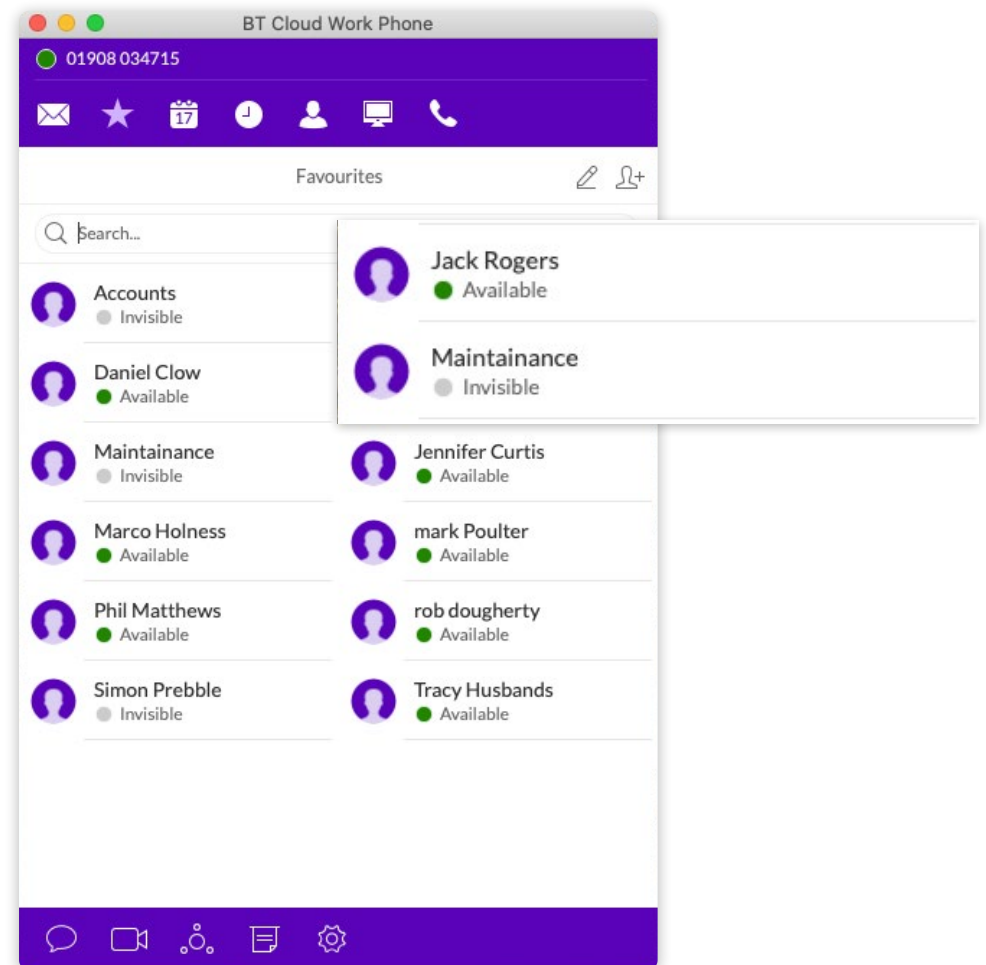


View Presence Status of a Favourite Contact

The Presence Status lets you know if one of your Company Contacts is free to take a call or not. This is only shown on your Favourites screen – you can't see Presence Status from your Company Contacts list.

To view Presence Status

1. At the top of the screen, click . All of your existing Favourites are shown.
2. Under the Contact name is a dot:
 -  – Available, go ahead and give them a call.
 -  – busy, often already on a call.
 -  – Do Not Disturb.
 -  – Invisible (off-line).






Adding an avatar to any Contact

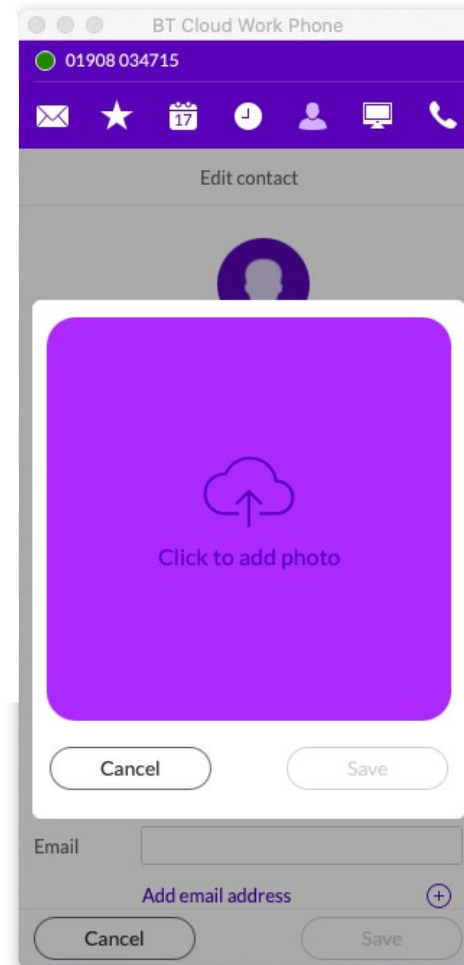
So you can easily import Contacts, the BT Cloud Work Desktop App seamlessly integrates with Microsoft Outlook and Mac Address Book. If there are pictures in these contacts, the photos will display in your Contacts list.

When you have a lot of Contacts, sometimes it's easier to recognise the person you want to reach when you have a visual hint. The App lets you upload any photo or graphic to use as an avatar, which displays next to the name of the Contact. For example, you can upload a photo of the person or an image file, like a logo or animal, to represent them.

The avatar is visible only to you while you're using the App – it won't be seen by the person you're contacting. This is different from a profile image you might have used to display publicly. This avatar is for your personal recognition use only.

How to add an Avatar

1. At the top of the screen, click .
2. Click the  and select All, Company, Personal, or Outlook.
3. Click the name of the Contact you want to assign an avatar to.
4. Click  next to the name. The Add Photo screen opens.
5. Click to Add Photo. Find the image file you want to use.
6. Click Save. You should now see the uploaded image next to the Contact's name.







Note:

Your personal profile image and profile image in Company Contacts will be synced across the Cloud Work Desktop App. However, your newly added photo will not automatically replace the one for you that was manually added earlier by your Contacts. Cloud Contacts added locally do not affect Favourites from external sources, such as MS Outlook and OS X Contacts.




Updating your Personal Contacts list

Your Personal Contacts list may already be synced to your mobile phone or Microsoft Outlook, but you can also manually add, edit, or remove a Personal Contact at any time.




How to add a Contact

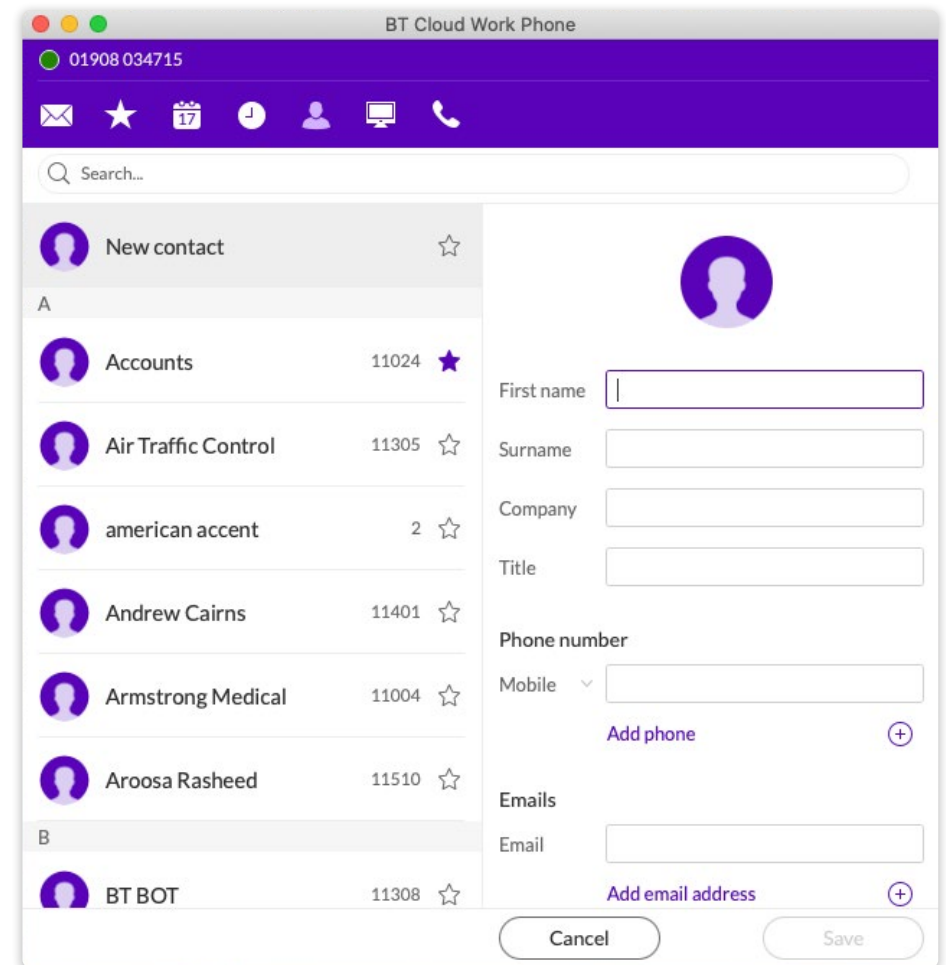
1. At the top of the screen, click .
2. Click the  and select Personal.
3. Click  in the top right corner to open the Add Contact screen.
4. Fill in any of the information fields you want, such as name, email address, and a phone number or two. You can always come back and add more details later.
5.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

How to edit a Contact

1. At the top of the screen, click .
2. Click the  and select Personal.
3. Click the name you want to edit.
4. On the Contact Details screen, click  in the top right of the screen.
5. Make the changes you want to any of the Contact's details.
6. Click Save.

How to delete a Contact





1. At the top of the screen, click .
2. Click the  and select Personal.
3. Click the name you want to remove.
4. On the Contact Details screen, click .
5. Click Delete.
6. In the confirmation box, click Delete again. The Contact is permanently removed from your Personal Contacts list.



Make a call

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

How to make a call

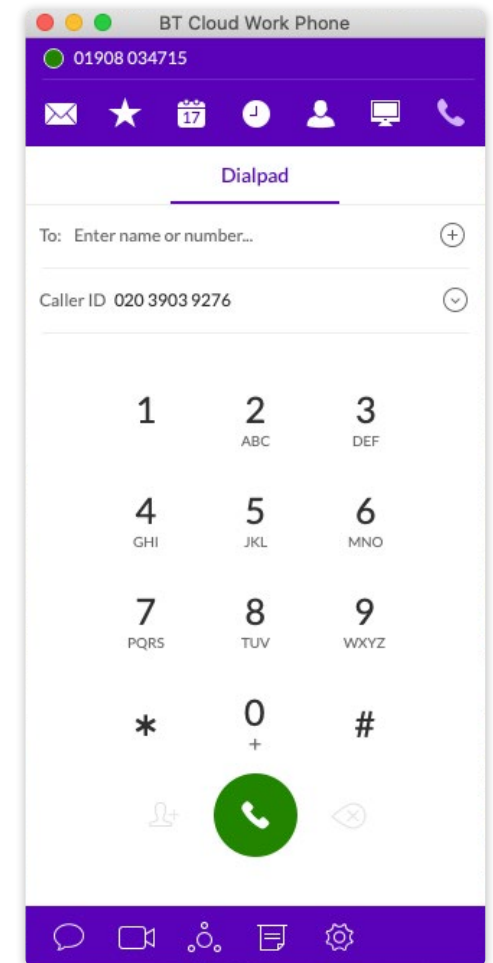
1. Click  in the top menu to bring up the Dial Pad.
 - In the 'To' field, either click  to select a Contact, or click the digits on the Dial Pad to manually dial a phone number.
 - In the Caller ID field click  to select the phone number you want displayed to the receiver of the call.
2. Select the number.
3. Click  to place the call.
4. When the call goes through, the caller's screen will change to 'Active Call', and display either the called phone number or extension number if the call is to an internal number.

TIP:

You can also make a call directly from your Contacts screen. Just click the name you want to call and your call will connect from the screen.

Caller ID

The Outbound Caller ID is set to your company name by default. In some geographic areas, the option to use your user name (first name, last name) for the outbound caller ID is enabled.



Make a call

HD Voice and Secure Call Indicators

HD Voice

Provides optimum call quality automatically between devices that support high definition.

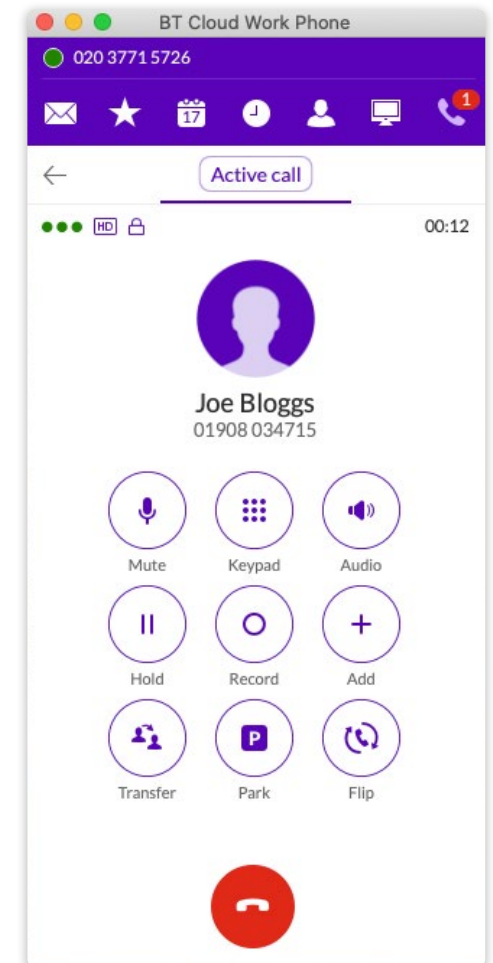
BT Cloud Work uses the Opus codec to provide greater voice clarity, especially in limited bandwidth and network environments.

Secure Voice

Secure Voice calls are supported between devices capable of the feature. This can be obtained by contacting your account manager at BT.

VoIP unavailable

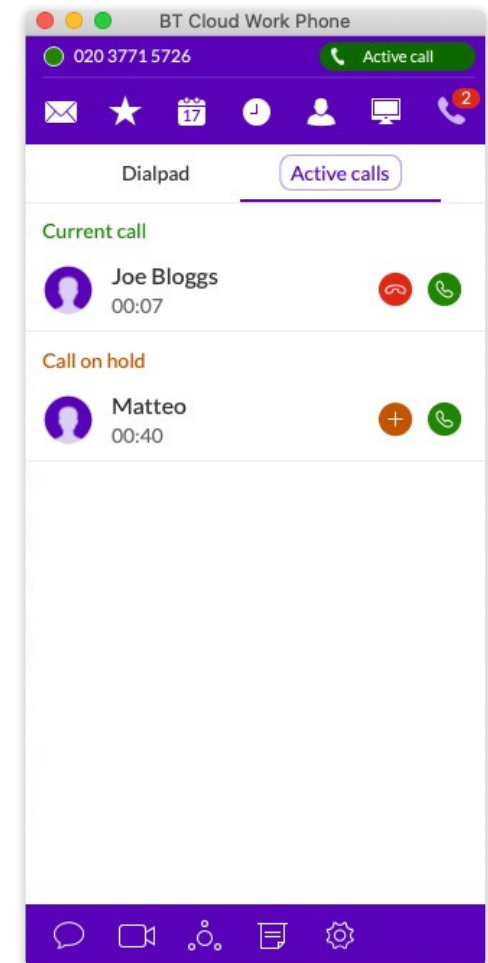
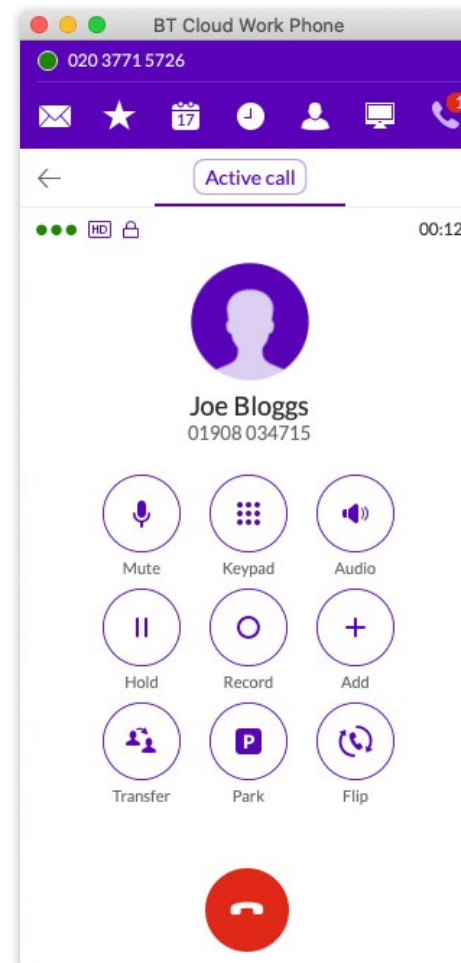
A warning shows when VoIP calling is unavailable.



Call Management

The Call Management feature displays a Current Call and a Call on Hold, with the following quick actions available to you:

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




Answer a call

When a call comes in, your BT Cloud Work Desktop App screen automatically changes to the Incoming Call screen, so you know someone is calling even if your computer sound is down. The screen shows the phone number (or internal extension) of the person calling, as well as their name and photo if available.

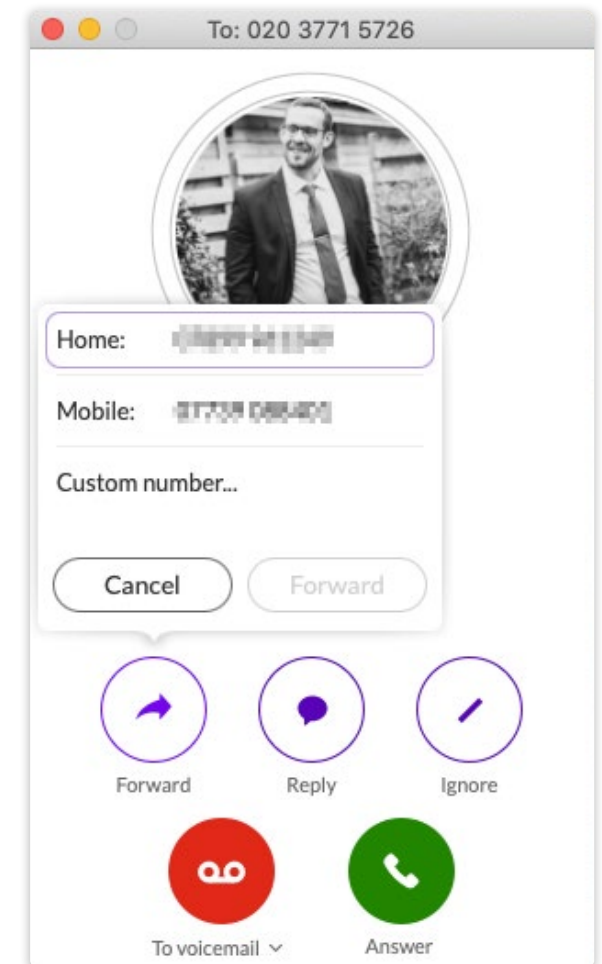
As well as answering the call, you have the following options:

- Forward the call to another extension.
- Reply with a courtesy message.
- Send it directly to voicemail.
- Ignore the call. If you do this, the call is dealt with based on the call handling rules set up by the extension owner.

Pick up the call

From the Incoming Call screen, click  to pick up the call. The volume on your computer is automatically switched on.

All incoming calls are shown in a separate window when they come in. This window appears when you have more than one incoming call.



Answer a call

Respond with a courtesy message

When you can't take an incoming call right away, you can provide a courtesy response using the automatic text-to-voice options. You can select a prepared message or type your own, and the App will convert it to voice and relay the message to your caller.

To respond with a prepared message

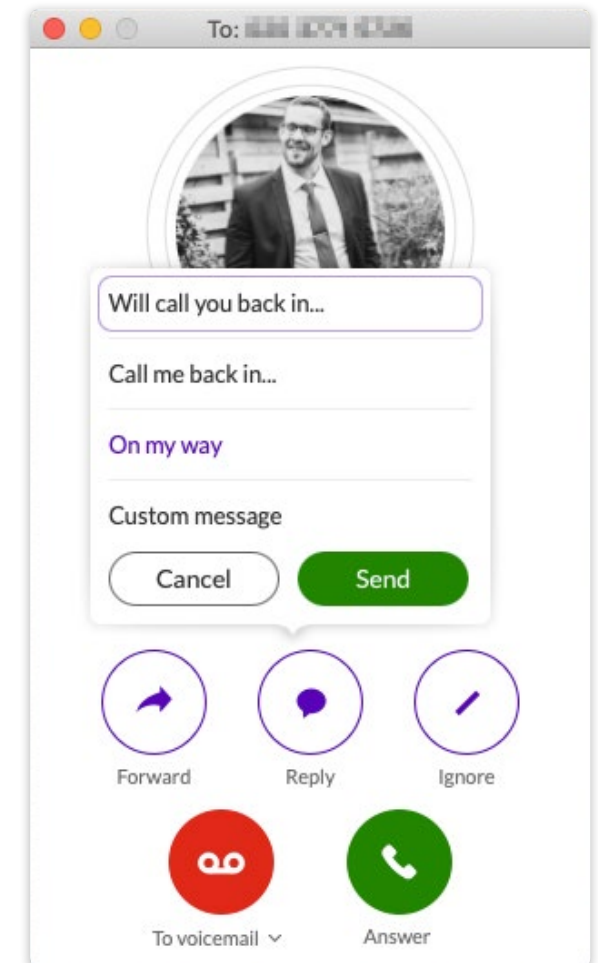
1. From the Incoming Call screen, click 'Reply'.
2. A pop-up screen opens with three different messages, such as:
Call me back in...
3. Click the message you want to use. If 'Call me back in...'; enter a time limit.
4. Click 'Send' and the message is relayed to your caller.

To respond with a custom message

1. From the Incoming Call screen, click 'Reply'.
2. Click 'Custom Message'.
A pop-up screen opens with message options.
3. Enter the response you want to send.
4. Click 'Send' and the message is relayed to your caller.

To respond to an urgent request

When an urgent request is received, and replied to with a Custom Message, the requester may press 5 on their phone and enter an 'urgent' call back number that is instantly received.



Answer a call

Screen Voicemail

If you're unsure if you want to pick up a call, you can screen it first. The App allows you to send the caller to Voicemail, but hear the Message being left. At any time while the caller is leaving you the Message, you can pick up the call and talk to the person. The Voicemail is automatically stopped and your call becomes live.

How to screen the call

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

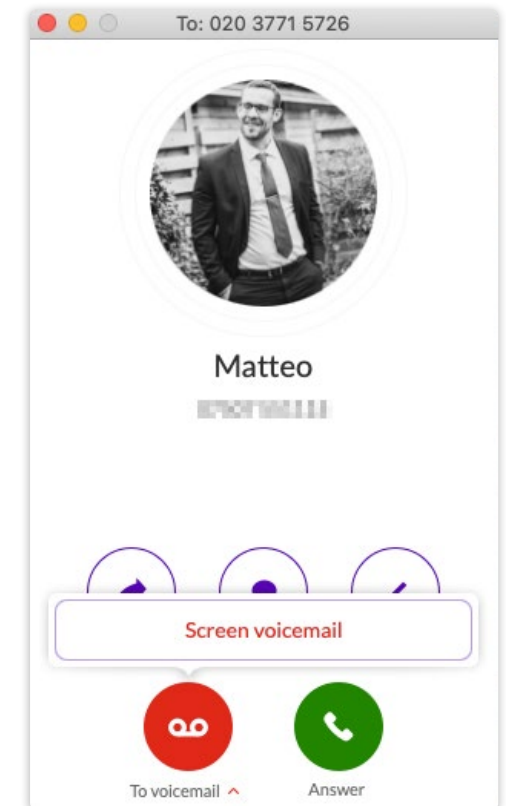
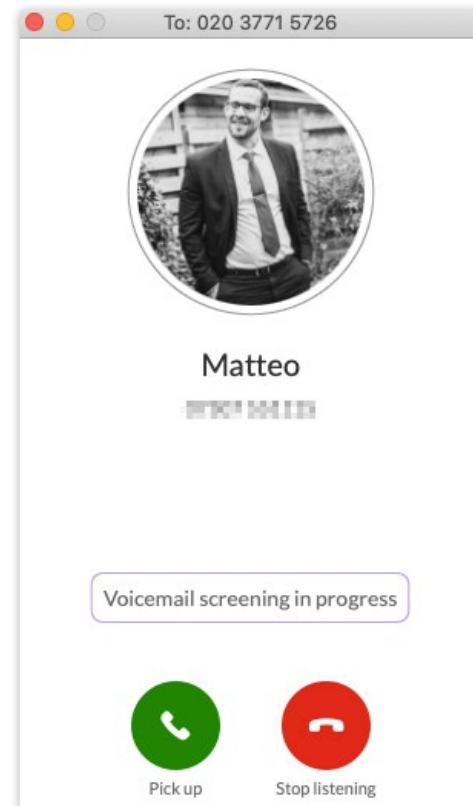
Send the call to Voicemail

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

Forward the call

When a call comes in and you think someone else might want to take it, you can forward it.

1. From the Incoming Call screen, click 'Forward'. A pop-up screen opens with phone number options.
2. Click the phone number you want to forward it to or click 'Custom' and type in the phone number.
3. Click 'Forward' and the App transfers the call to the other phone number.
4. Click 'Ignore' to stop ringing on your App and allow Call Forwarding rules to take effect.

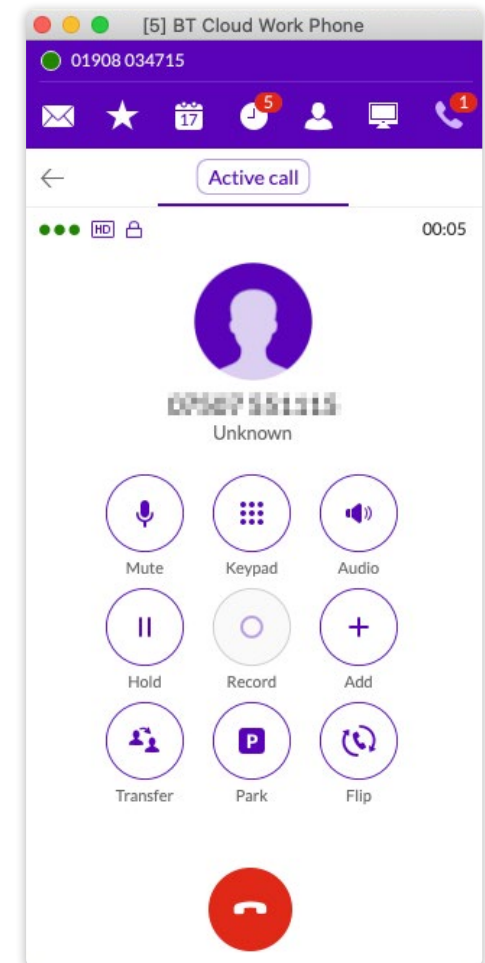
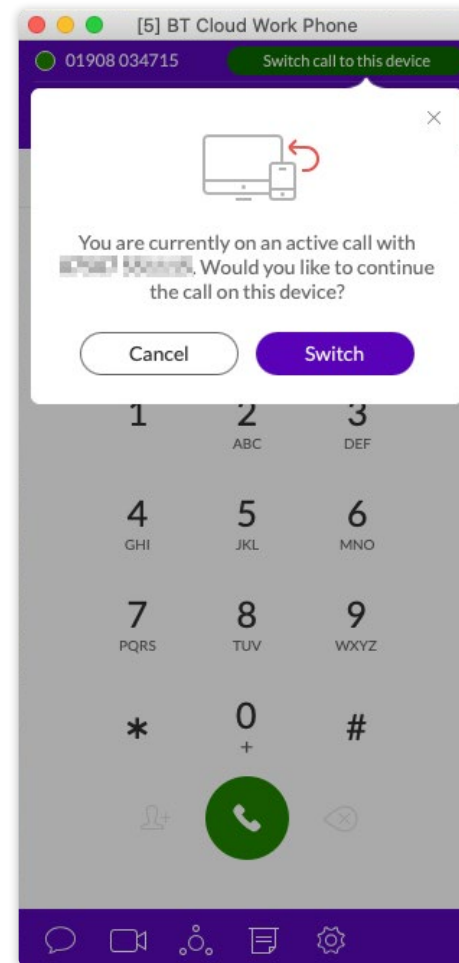
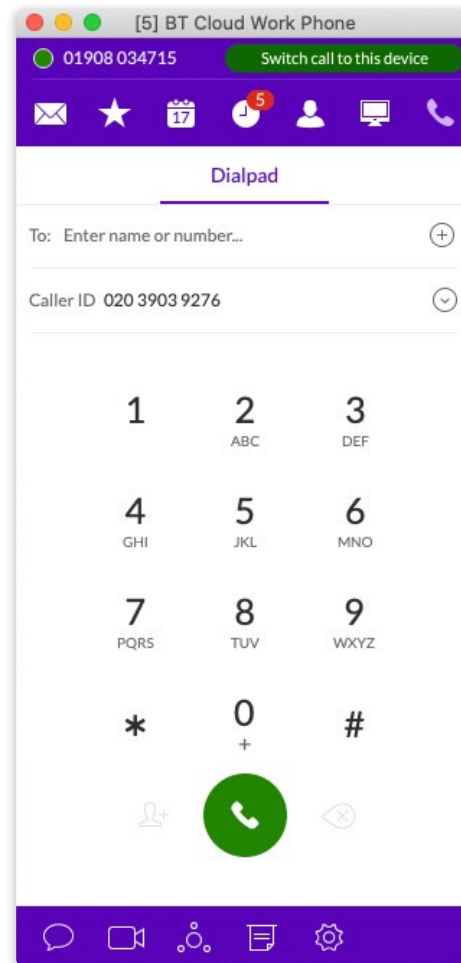


Answer a call

Call Switch

If you're finishing an urgent phone call taken on your BT Cloud Work Desktop App, but you must go into a meeting, you can instantly switch the call from your desktop to your mobile phone without missing a beat in your conversation. Any screen when the App is active has a simple, two-click process to handover the call.

You don't have to wait for the incoming call to ring on your mobile device to pick up. You can engage it, while still on your call and immediately pick up the conversation. This minimises interruptions and cuts out call transfer time.



Call Screening

When Call Screening is enabled, you can hear the caller's recorded name when answering a call and use the IVR prompt to answer the call.

<input type="checkbox"/>	Status	Name
<input type="checkbox"/>	✓	Tim Patchett

Tim Patchett

Ext. 13007 Outbound calls/faxes Meetings Notifications

▼ User details

▼ Phones & numbers

▼ Screening, greeting & hold music

▼ Call handling & forwarding

▼ Messages

Tim Patchett

Ext. 13007 Outbound calls/faxes Meetings Notifications

▼ User details

▼ Phones & numbers

▲ Screening, greeting & hold music

User hours After-hours Blocked calls

User Greeting ⓘ

Enable

Call screening ⓘ

Enable

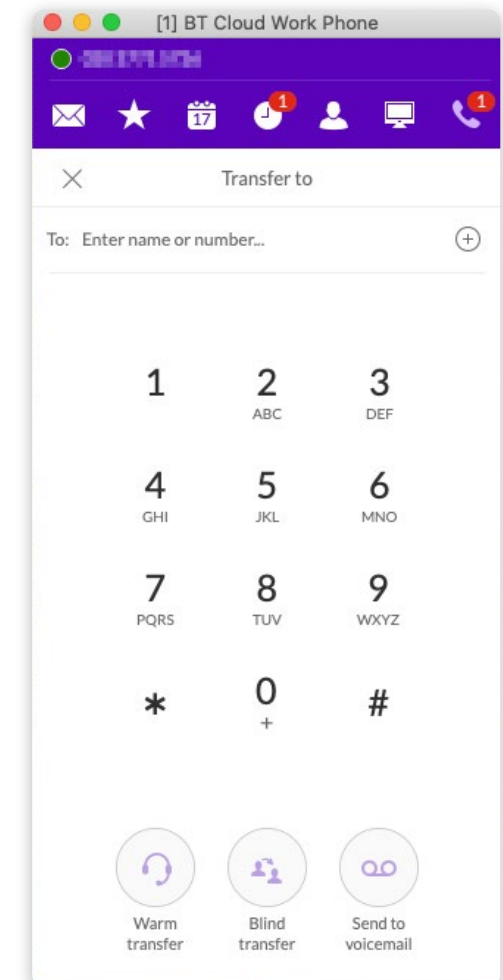
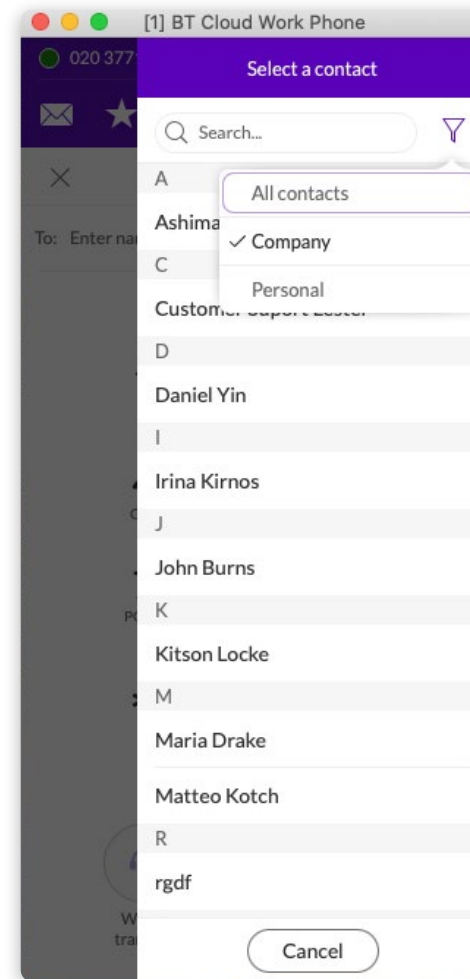
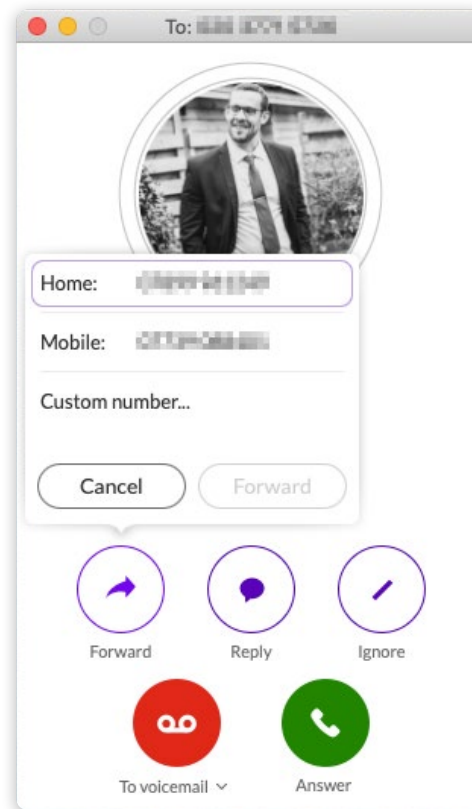
If caller ID not present, ask callers to say their name before connecting.

Edit

Switchboard Support

Provides live answer capability to inbound calls. (Additional call information is exposed when in use.)

- After live answer to call, attendant can see all destinations into which the customer is calling and quickly find the correct person.
- A recent call list contains the top 10 recent numbers used for transfer.
- Search and filter options allow the user to view Contacts from different sites or filter the full list of sites and access Contacts at a lower level in the hierarchy.
- The use of this feature depends on multi-location availability for a specific account.
- Filtering available by searching through particular sites.

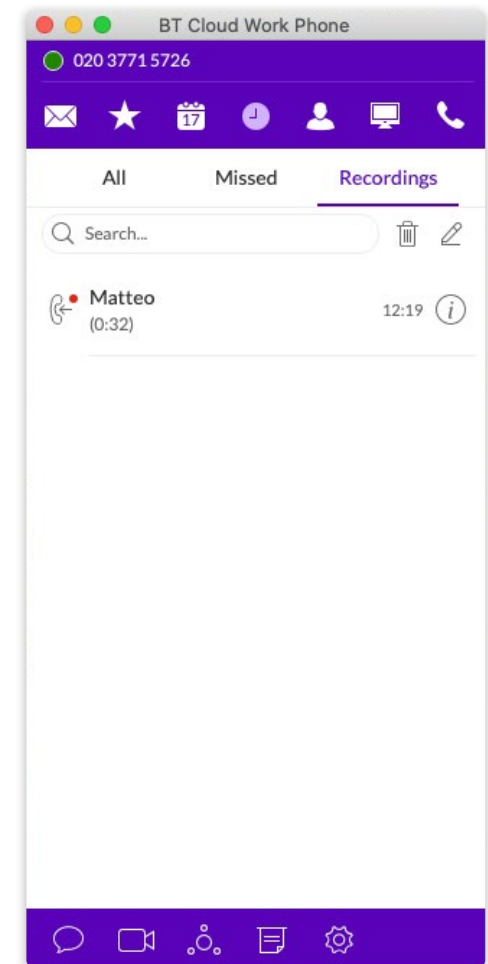
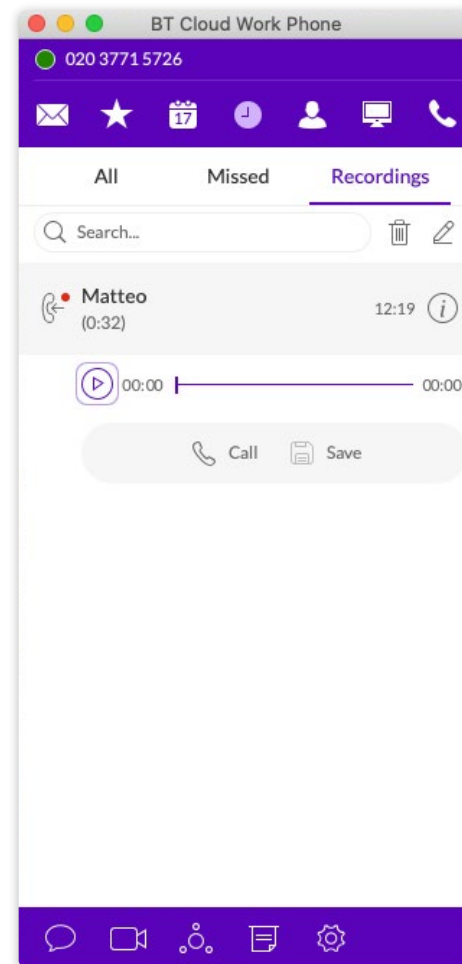
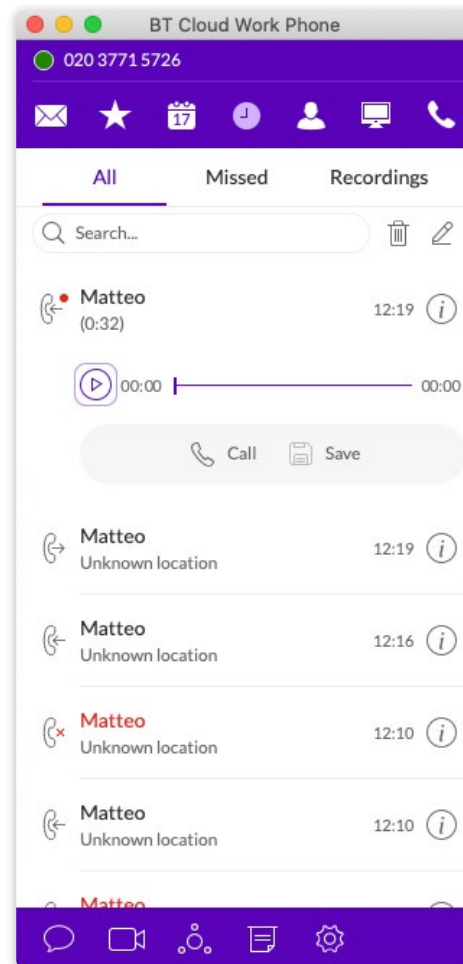


Call Recordings

Call Recordings can now be accessed from your BT Cloud Work Desktop App Call Log.

The small red dot indicates calls that have been recorded, while the tiny arrows show if it's an inbound or outbound call.

By selecting 'Recordings' at the top, you can play or delete each recorded call.




View or listen to a Message

The Messages screen lists all of your Voicemail and Instant Messages in one place, so you can easily prioritise those you want to open first. It's also automatically synced to your online account and mobile app, so it's always up to date.

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

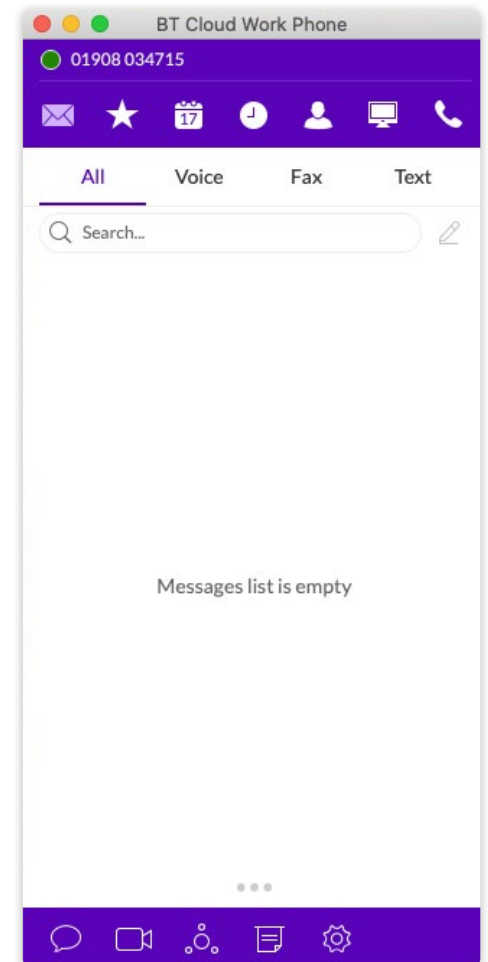
To view your Messages

At the top of the screen, click . The Messages screen opens and lists all your messages.

Voicemail Transcription



When enabled, your Voicemail messages will be converted to text and displayed.

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










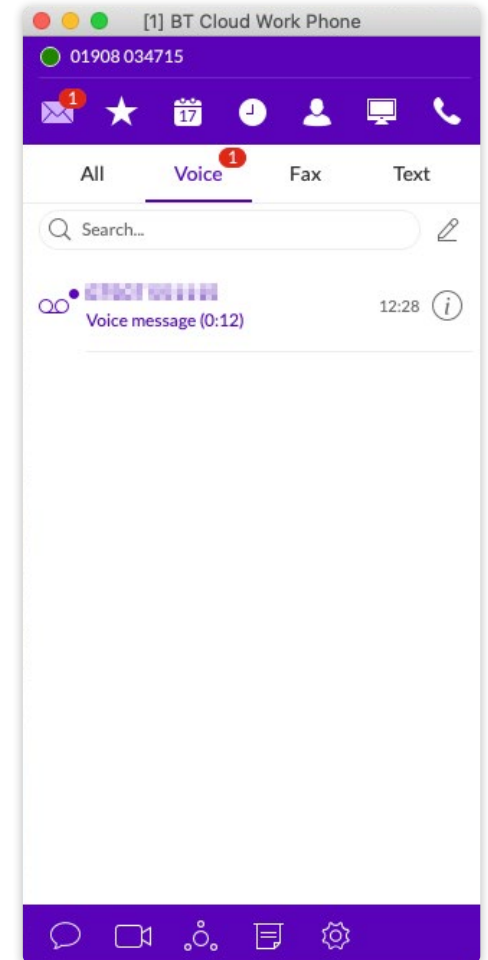
View or listen to a Message

To listen to a Voicemail Message

Voicemail Messages are shown with this icon: . Simply click the Message you want to hear, then click  on the audio bar to start the Message.

When you've finished listening to the Message, you can:

-  Call the person back.
-  Message the person back.
-  Delete the Message. It is permanently removed from your account.
-  Save the files to the cloud.
-  Flag a Message you've already heard.
-  Block this number from your account so you no longer receive their calls.
-  Add this person to your Contact list.



Hold an Audio Conference call

You can hold an Audio Conference call at any time directly from the BT Cloud Work Desktop App, without having to schedule it ahead of time, unless you want to. Plus, every Cloud Work user is assigned a unique conference line, so there are no network congestion issues.


If you want to have a video meeting, you can use Cloud Work Online Meetings instead.

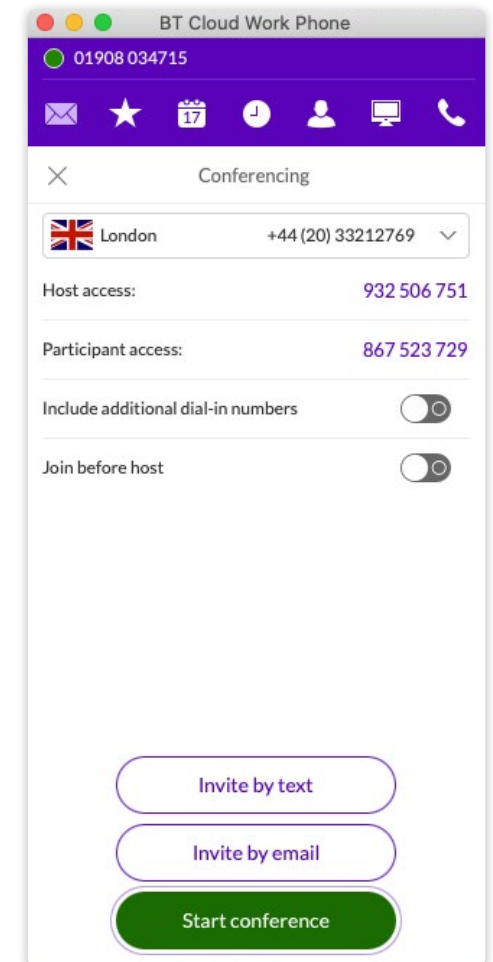
Your Host Access number is the phone number you dial to start the Audio Conference call, while the Participant Access number is the phone number your guests will dial to join it. As the host, you can disconnect any guests on the call.

Premium Conference Numbers

If an international dial-in number for Cloud Work Audio Conferencing does not offer charge-free access, you can purchase a charge-free or international number for a conference bridge. You can do this through Cloud Work Self-Service or by submitting a ticket.

How to hold an Audio Conference call

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




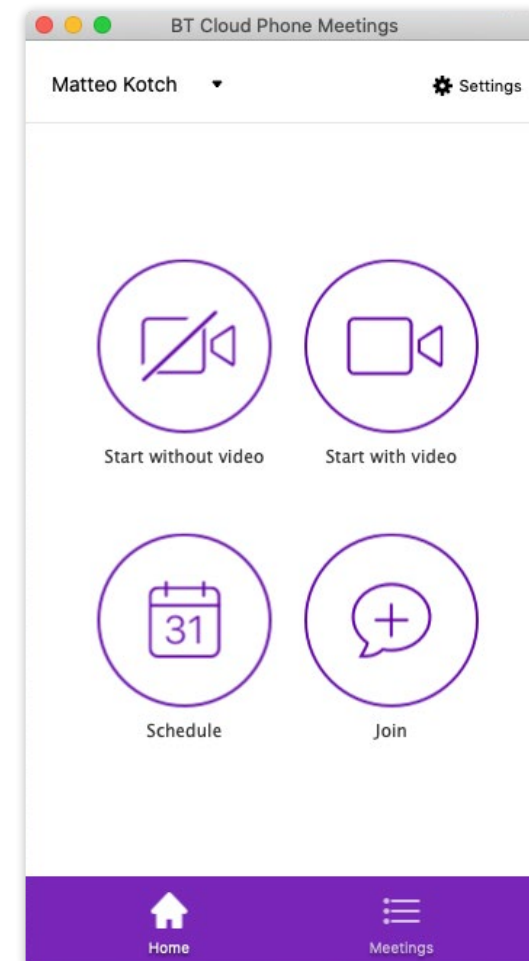
Launch a video Online Meeting

You can hold a video Online Meeting at any time using BT Cloud Phone Meetings, without having to schedule it ahead of time, unless you want to.

Every Cloud Work user is assigned a unique Cloud Work Online Meetings ID and password, so you can hold as many Online Meetings as you want. You'll have access to video views from web cameras, so you can see people face-to-face, and screen shares, so you and others in the meeting can easily share presentations or other documents on your computer.

To join or schedule Cloud Work Online Meetings







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



Send or receive a fax

You can send and receive online faxes directly using the BT Cloud Work Desktop App, so you'll never have to walk to your separate fax machine again. Your phone number is also your fax number, meaning you only have to remember one number too. Plus, you can fax to one or more people at the same time.

How to send a fax


1. At the bottom of the screen, click . The 'Send Fax' screen opens.
2. In the 'To' field, either click  to search all the Contacts you want to fax, or type in all the fax numbers.
3. To add the Contact to the fax 'To' field:
 - Click the Contact's caller ID or phone number. The Contact is automatically added.
 - Begin entering the Contact's name in the 'To' field. When it matches a Contact in the list, you can click the name that appears.
4. Decide if you want to include a cover page. The default is 'Regular'. Click  next to 'Regular' to see your cover page options.
5. Or click , then scroll to the bottom to see instructions on how to create your own custom cover page and add it to the list.
6. Click  at the top right of the screen to save your selection.
7. Back on the 'Send Fax' screen, in the 'Note' field, add a comment or message if you want.
8. Attach any files you want to send. Click  to browse and upload your attachment. Or drag-n-drop files from your desktop onto the dotted field (up to 20 MB).
9. Click 'Send now', or click 'Send later' and set the date and time when the fax will be sent.

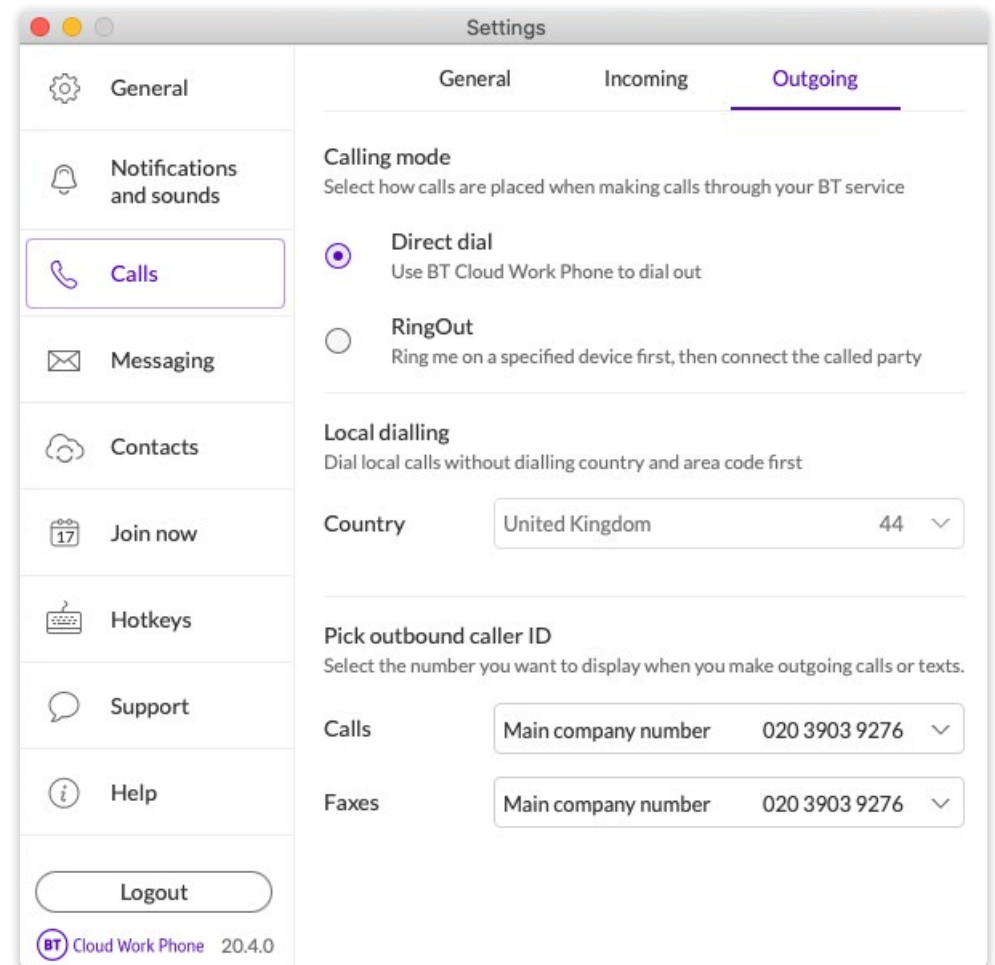
ASCII and non-ASCII characters are supported.

Send or receive a fax

Set Caller ID for faxes

You can set the Caller ID for faxes in three simple steps:


1. Click .
2. Click 'Outgoing'.
3. In 'Fax Direct number', enter the phone number.




View your call activity records


You can easily review all your call activity directly from the App, including outgoing, incoming and missed calls to your phone number.

How to see your call activity

1. At the top of the screen, click . The Call Log screen opens, showing all of your incoming and outgoing calls.

2. Here's what the icons mean:

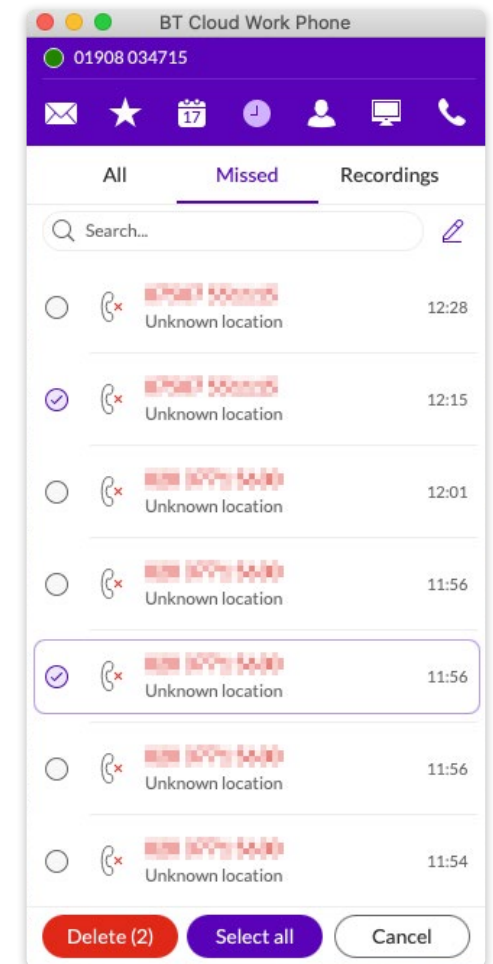
 Missed call.

 Outgoing call you made.

 Call is selected for deletion.

Did you know?

Double-click on any call listed in the log to call the person again. Or click to see more options, such as adding the person to your Contacts list.



Personalise the App


The BT Cloud Work Desktop App is ready to use as soon as you install it on your computer and log in. But it's nice to personalise it and tweak it to suit your style of working.

Note:

The Settings screens shown are from the Windows App, Mac screens are similar.

The App follows your device's language when available. You can set your language of choice in the language dropdown menu on the Settings > General page.

Personalise the App – General

At the bottom of most App screens, click . The Settings screen opens in a separate window. Then select 'General'.

• Set as a default faxing and calling application.

Clicking the 'Apply' button changes the status to: 'Currently set as default faxing and calling application'. Return to previous setting by:..

• Automatically launch this application on start-up: ON or OFF.

• Run application minimised': ON or OFF.

• Keep application in foreground: ON or OFF. Set this switch to ON to keep the App running on top of all other applications.

Access my account online:

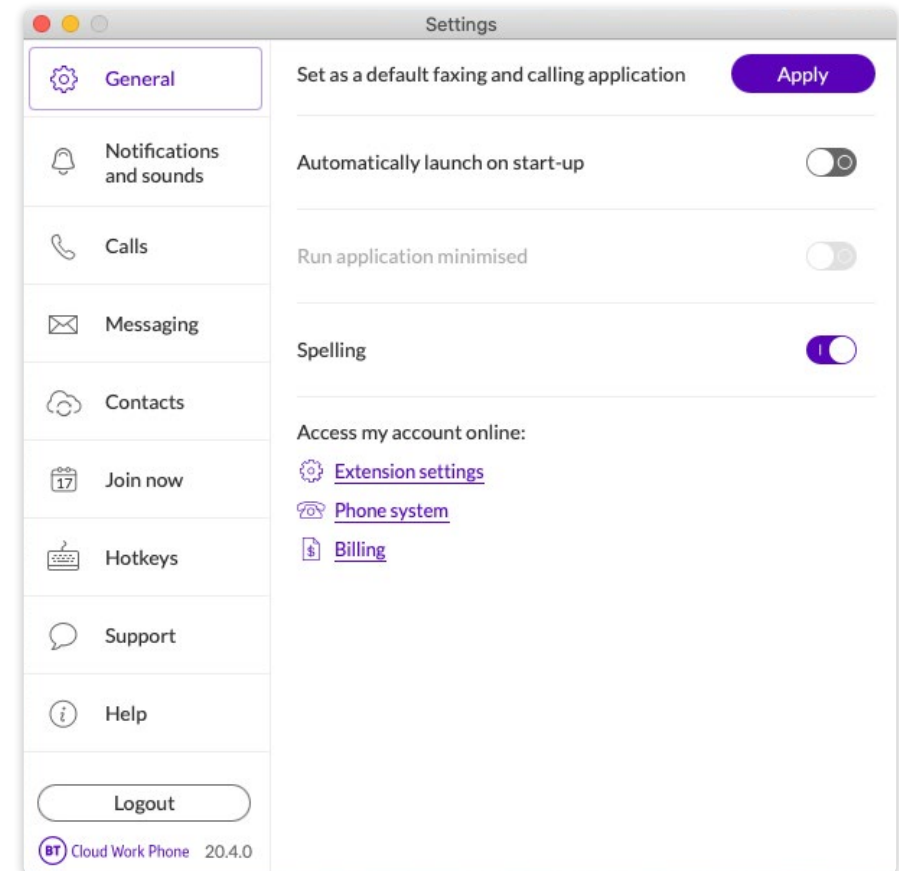
Clicking 'My Extension Settings' opens your Cloud Work App so you can review or change your settings.

Clicking 'Phone System' opens your Cloud Work App so you can review or change your phone settings.

Clicking 'Billing' opens your Cloud Work App so you can review your service plan and international call settings.


Note:

Phone System and Billing are only accessible to Administrators.



Personalise the App – Sound

The Sound menu lets you manage your microphone, speaker, ringer style and volume. If installed, the Plantronics Headset can be switched ON or OFF from here too.

At the bottom of most App screens, click . The Settings screen opens in a separate window. Then select 'Sound'.

• Microphone

Manage your microphone type and level.

Automatically adjust microphone settings

Switch this OFF to manually adjust your microphone.

• Speaker

Use the drop-down to select Speakers/Headphones. If the Plantronics Headset is installed in your system, you can select it here.

• Ringer

If you prefer the BT Cloud Work Desktop App not to ring during an incoming call, you can turn off the ringer. This can be configured on the App at: Settings > Audio > Ringer.

• Volume

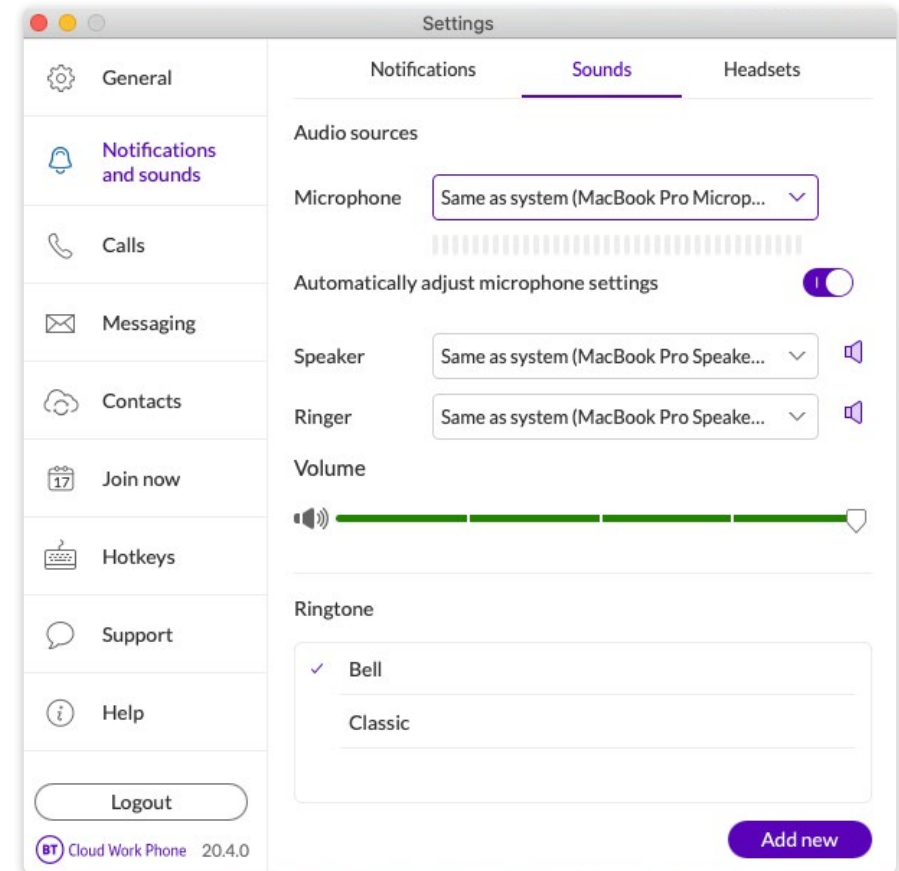
Set your speaker or handset volume with the slide bar.

• Plantronics Headset

Switch the Plantronics Headset ON or OFF from the Sound menu. (Headset must be installed.)


• Ringtone

Choose a ringtone you like by clicking to hear the sound or click 'Add New' to upload a custom ringtone.



Personalise the App – Calls – General

The Calls menu allows you quick access to many of the BT Cloud Work Desktop App settings, with the 'Calls General' tab covering Heads Up Display (HUD), Call Quality, and Blocked Numbers.

At the bottom of most App screens, click . The Settings screen opens in a separate window. Then select 'Calls' followed by 'General'.

- **HUD**


Monitor your Contacts, view Presence Status, and call or Instant Message them.

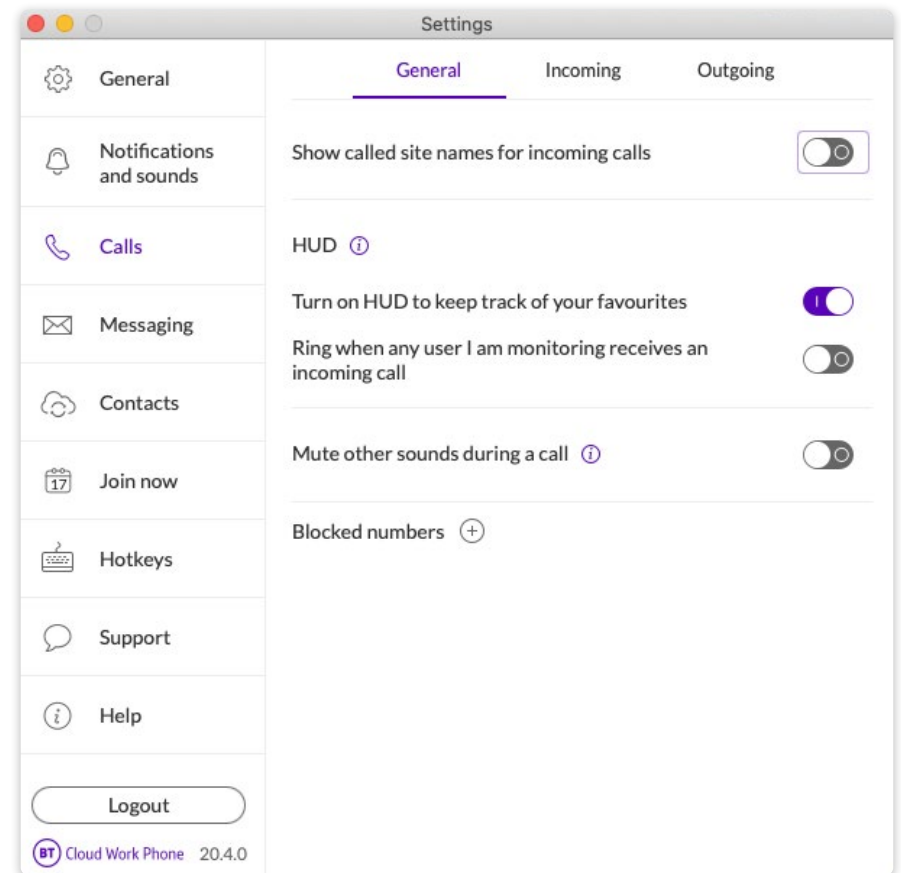
Ring when any user I am monitoring receives an incoming call ON or OFF.

- **Call Quality**

Use high bandwidth whenever possible.

- **Blocked Numbers**


Click  to open a field into which you can list phone numbers that you want to block from reaching your extensions.



Personalise the App – Calls – Incoming

The Calls menu allows you quick access to many of the BT Cloud Work Desktop App settings.

If you use a Mac, you can choose to automatically pause iTunes when a call comes in.

At the bottom of most App screens, click . The Settings screen opens in a separate window. Then select 'Calls' followed by 'Incoming'.

- **Display incoming call in the standalone window**

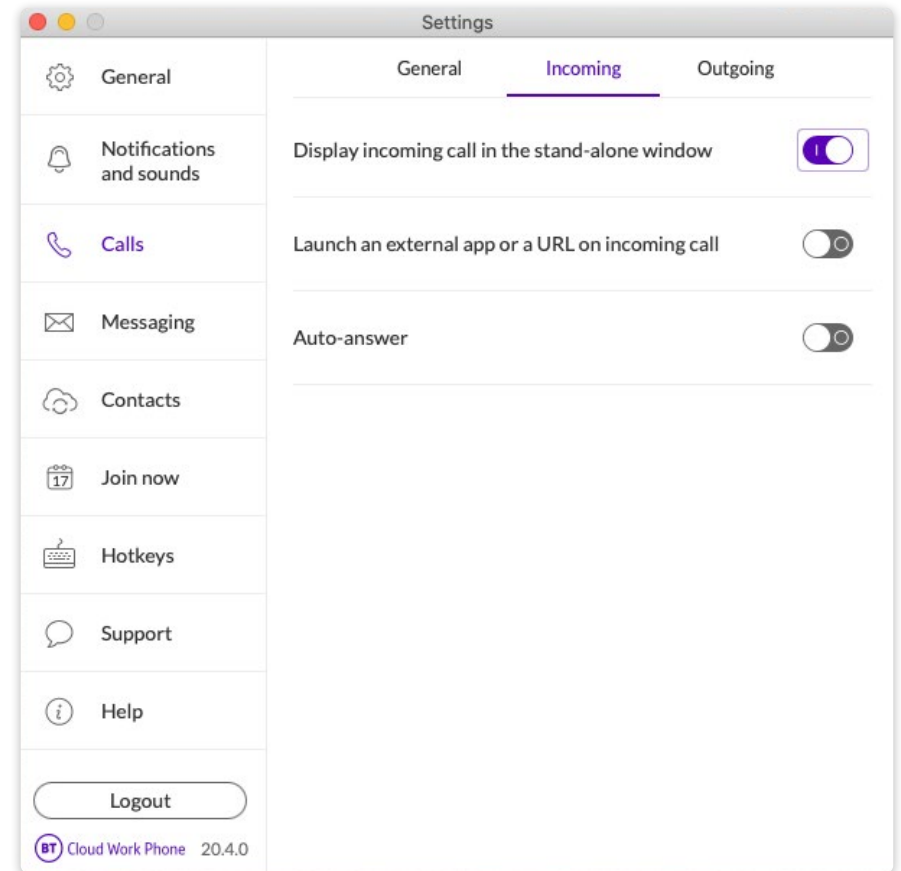
ON or OFF.

- **Launch an external app or a URL on incoming call**

ON or OFF.


Auto Answer

Switch ON to select the number of seconds to wait before an incoming call forwards to Voicemail or another extension. This can range from five to 30 seconds.



Personalise the App – Calls – Outgoing

The Calls menu allows you quick access to many of the BT Cloud Work Desktop App settings.

At the bottom of most App screens, click . The Settings screen opens in a separate window. Then select 'Calls' followed by 'Outgoing'.

- **Calling Mode/Direct Dial**

Direct Dial is only visible when a digital line is assigned to the computer where the App is installed.

- **Calling Mode/RingOut**

Ring me on a specific device first, then connect the call.

Prompt me to dial 1 before connecting the call. Switch OFF for the call to come directly to your extension without delay.

- **Default number**

This is a direct or company number to be displayed on your profile screen and App status bar. The default number does not affect the displayed number the person you are calling sees. You can select your default number in your user profile.

- **Local Dialing**

Dial local calls without entering the country and area code first. Select your 'Country' or 'Area code' from the given menus.

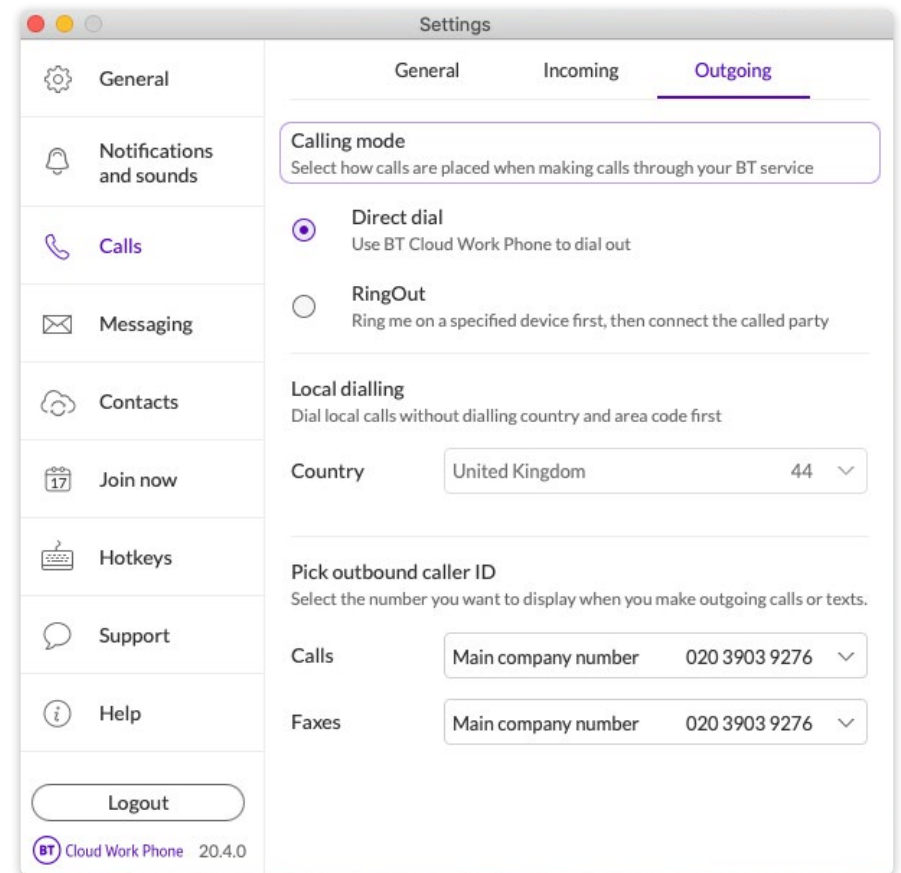
- **Outbound caller ID**

Select the number you want to display when you make outgoing calls or Instant Messages.

Calls: From the drop-down menu, select a number from which your calls will originate. All numbers on the Service Web are available.


- **Call Quality**

Use high bandwidth whenever possible.



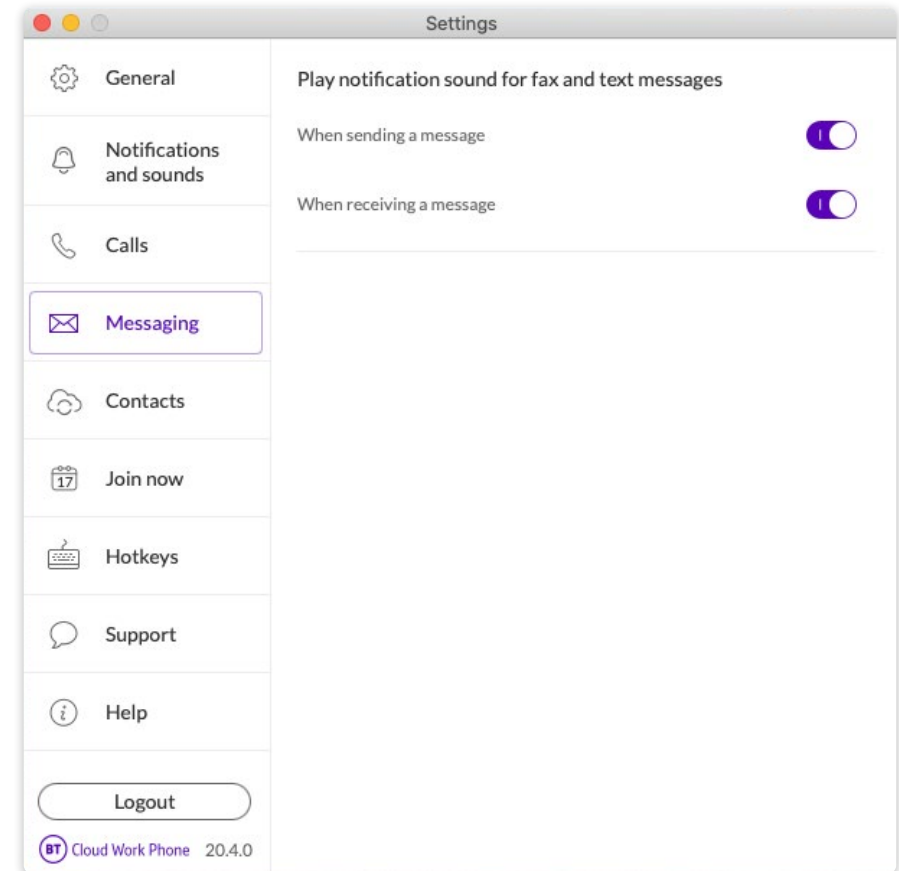
Personalise the App – Messaging

Use the Messaging menu to manage your incoming calls to the BT Cloud Work Desktop App.

At the bottom of most App screens, click . The Settings screen opens in a separate window. Then select 'Messaging'.

- **Messaging**

Play notification sound for faxes and Instant Messages.




Personalise the App – Contacts – PC

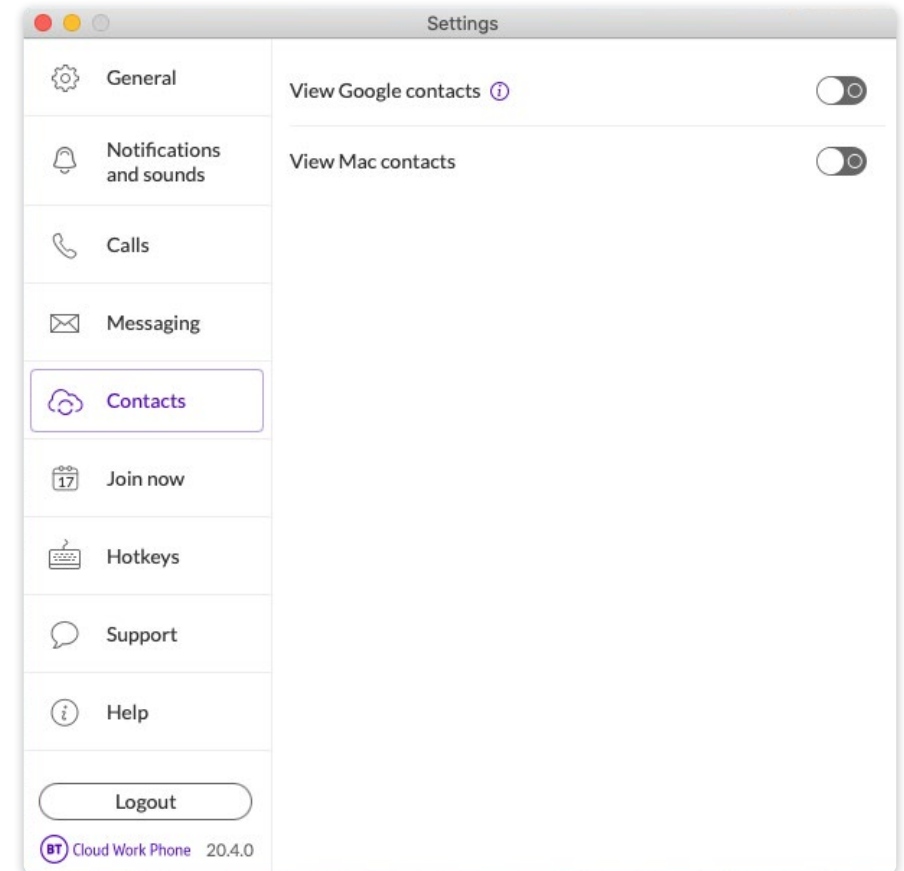
Integrate with Microsoft Outlook

The BT Cloud Work Desktop App seamlessly integrates with Microsoft Outlook, so you can easily call, fax, or Instant Message any of your Contacts while in Outlook.*

* Available for Microsoft Windows users only.

At the bottom of most App screens, click . The Settings screen opens in a separate window. Then select 'Contacts'.

- **View Google Contacts**
Enable to view Google Contacts.
- **Outlook plugin**
Enable to download Outlook plugin.
- **View Outlook Contacts**
Enable to select from Outlook folders.
- **Select profile**
Select from available profiles.




Personalise the App – Contacts – Mac

Integrate with Mac Address Book

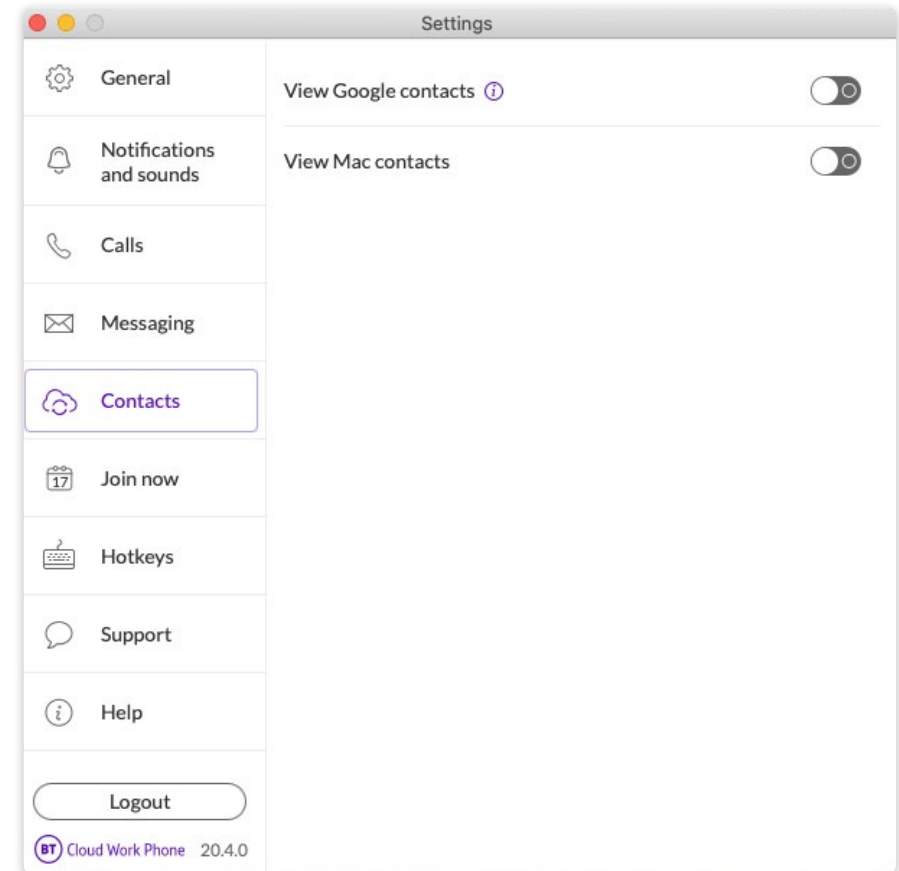
The BT Cloud Work Desktop App seamlessly integrates with Mac Address Book, so you can easily call, fax, or Instant Message any of your Contacts while in Mac Address Book.*

* Available for Mac users only.

How to set up your Mac Address Book to sync with the Cloud Work Desktop App

1. At the bottom of most App screens, click . The Settings screen opens in a separate window.
2. From the left menu, click 'Contacts'.
3. Set the 'View Mac Contacts' option to ON.

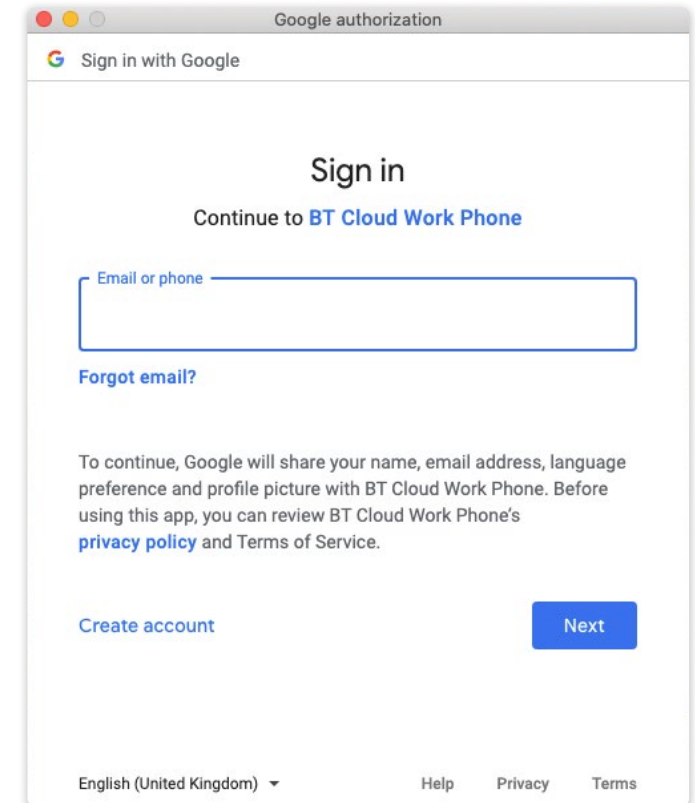
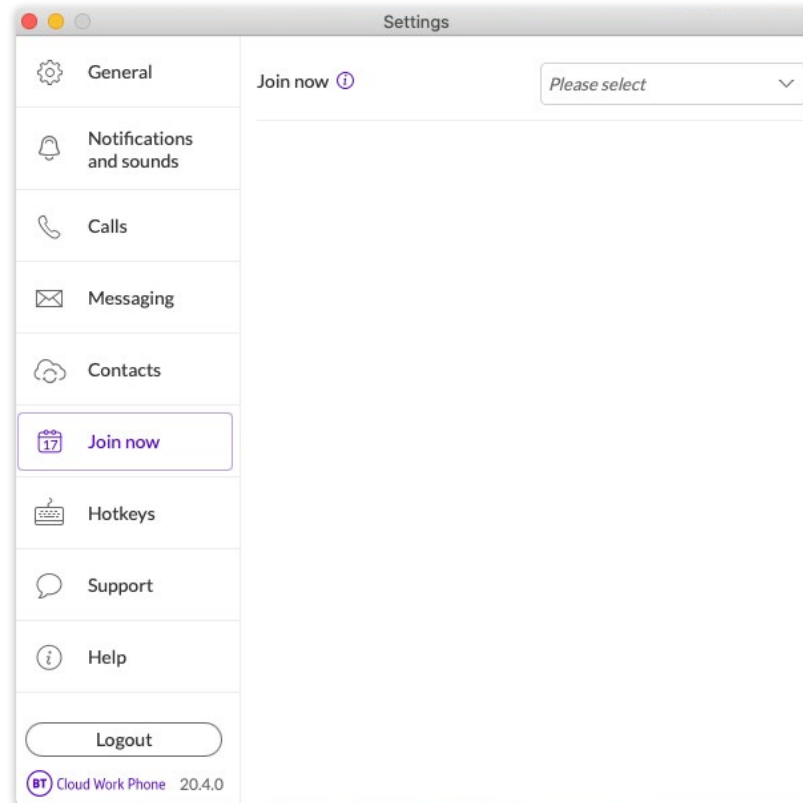
If this is your first time syncing your Mac Address Book to the Cloud Work Desktop App, you will be asked to allow the App to access your Mac Address Book.



Personalise the App – Join Now

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

- Identify meetings and conferences, and make calls from calendar events.
- Connect to Google Calendar or Outlook.
- Configure calendar source and notifications.



Personalise the App – Hotkeys – PC

These hotkeys are available for Microsoft Windows users.

Hotkeys*

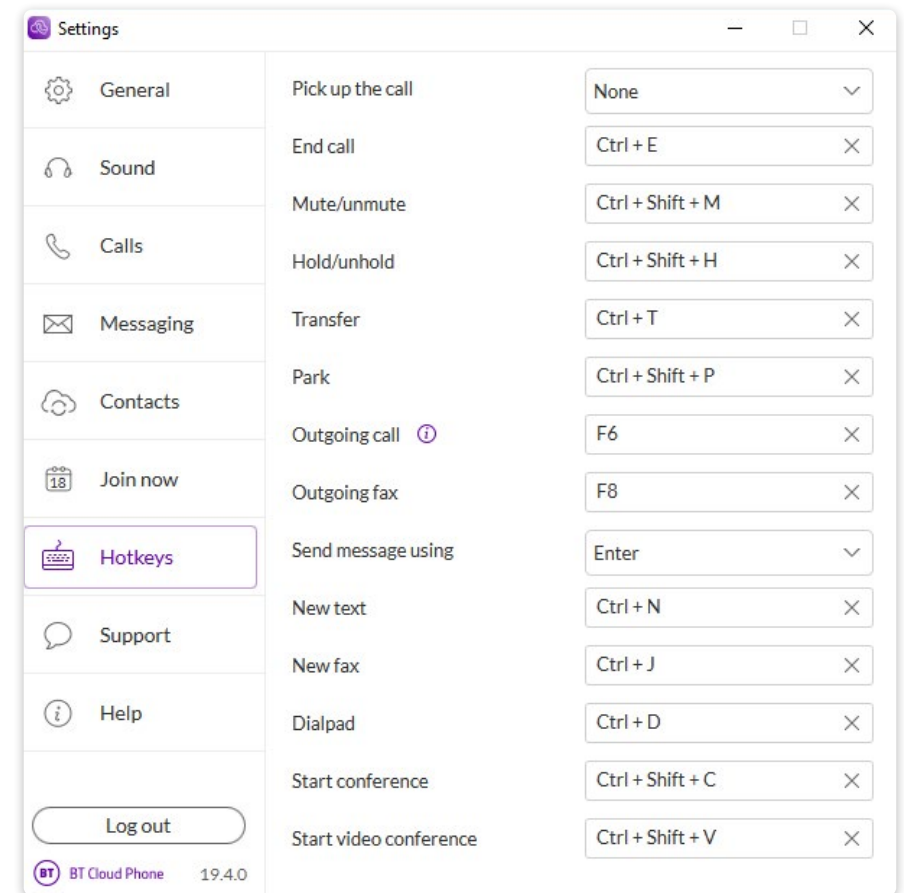
- Mute/unmute **Shift + Ctrl + M**
- Hold/unhold **Shift + Ctrl + H**
- End call **Ctrl + E**
- Pick up the call **None; Ctrl + Enter; Enter**
- Sending new Message **Ctrl + N**
- Sending new fax **Ctrl + J**

Advanced Hotkeys*

- Outgoing call **F6**
- Outgoing fax **F8**
- Park **Shift + Ctrl + P**
- Transfer **Ctrl + T**
- Dialpad **Ctrl + D**

Access my account online

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



* Hotkeys on the BT Cloud Work Desktop App will work if it's minimised, but the App must be active for them to function. They allow you to perform specific actions with just the touch of a key(s) on your Windows PC. For example, you can set hotkeys to pick up a call or to send an Instant Message.

Personalise the App – Hotkeys – Mac

These hotkeys are available for Mac users.

Hotkeys*

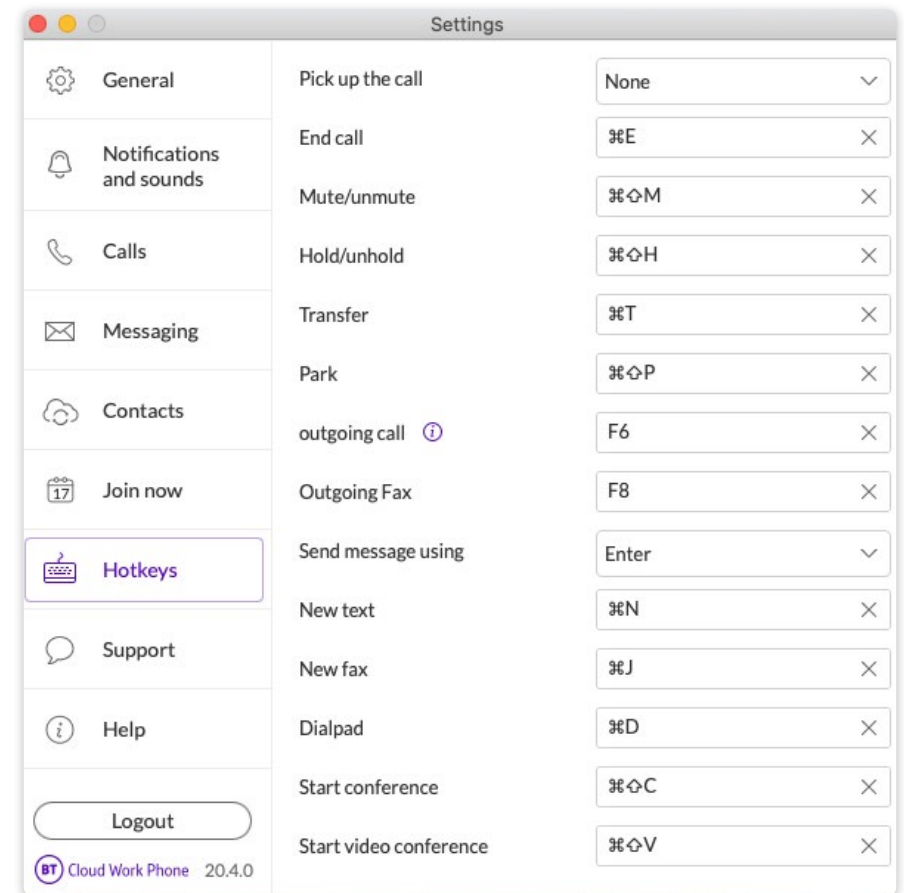
- Pick up the call None; Cmd + Enter; Enter
- End call Cmd + E
- Mute/unmute Shift + Cmd + M
- Hold/unhold Shift + Cmd + H
- Transfer Cmd + T
- Park Shift + Cmd + P

Advanced Hotkeys*

- Outgoing call F6
- Outgoing fax F8
- Send message using Enter; Cmd + Enter
- New fax Cmd + J
- Dial Pad Ctrl + D

Access my account online

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

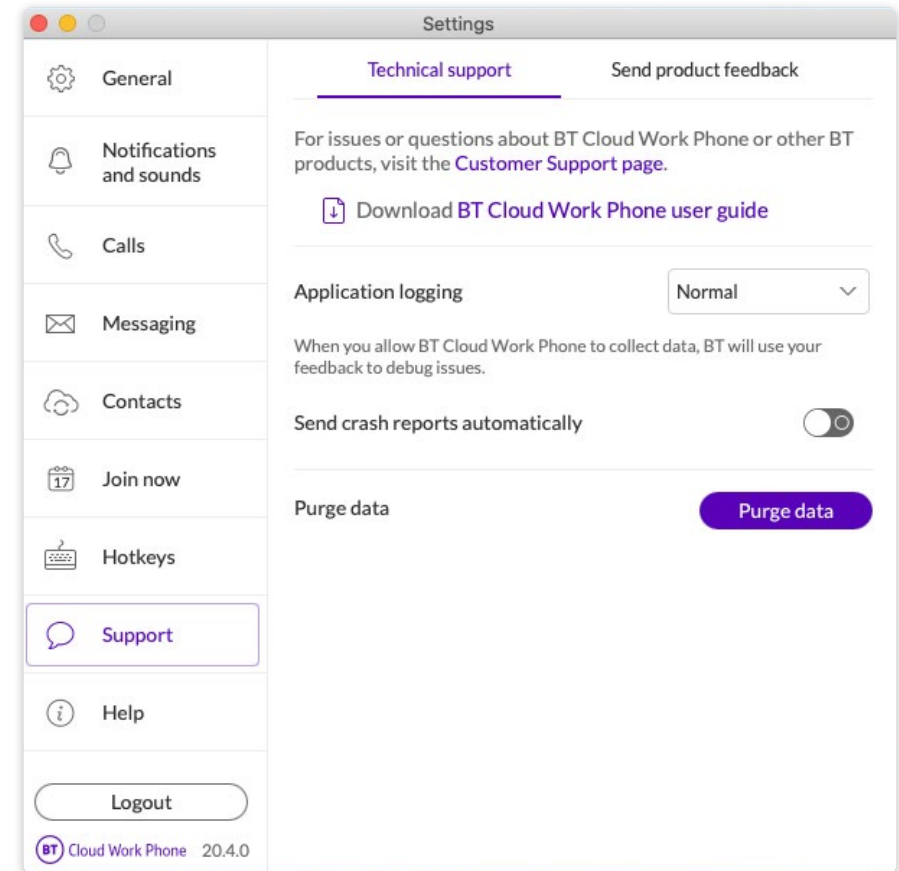


* Hotkeys on the BT Cloud Work Desktop App will work if it's minimised, but the App must be active for them to function. They allow you to perform specific actions with just the touch of a key(s) on your Mac computer. For example, you can set hotkeys to pick up a call or to send an Instant Message.

Personalise the App – Support

Technical Support

For help with the BT Cloud Work Desktop App or other Cloud Work products, please visit our [Customer Support Site](#) for FAQs, knowledge articles, Community, Guides or to open a case.



Personalise the App – Help

The BT Cloud Work Desktop App is a complete communications hub on your computer desktop that lets you easily talk, message, fax, and conference from a single, user-friendly App.

The message below the ‘About’ screen appears when you click ‘Check for Updates’ if your installed version of the App is up-to-date.

About the Cloud Work Desktop App

It’s a complete communications hub on your computer desktop that lets you easily talk, message, fax, and conference from a single, user-friendly App.

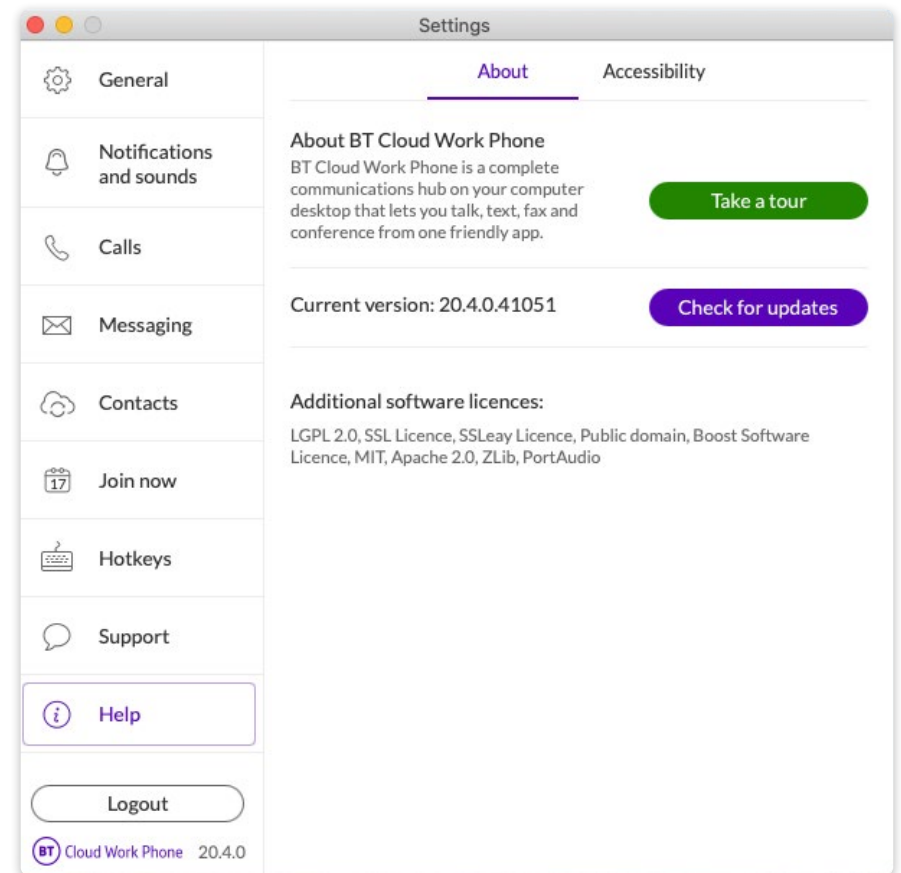
Take a tour

Learn about the latest features in your App.

Check for Updates

The current version of the App installed on your computer system is shown here.

- Click ‘Check for Updates’ to see if you have the latest version installed and download updates to your App.




Head up Display (HUD)

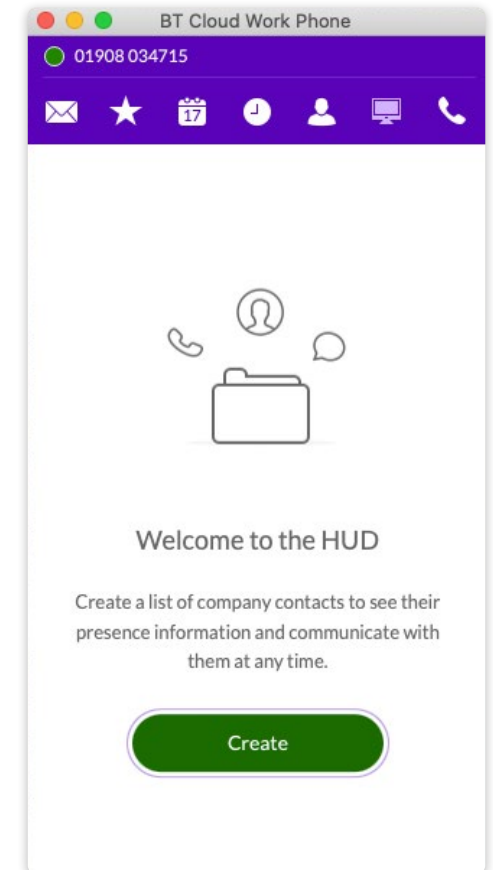
Head Up Display

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

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

To enable HUD, follow these steps:

1. Click the HUD icon  at the top of most App pages.
2. 'Welcome to the HUD' will appear if you have not set up your Presence Appearance in your online account. Otherwise your HUD list will sync automatically to the extensions in your Presence Appearance.



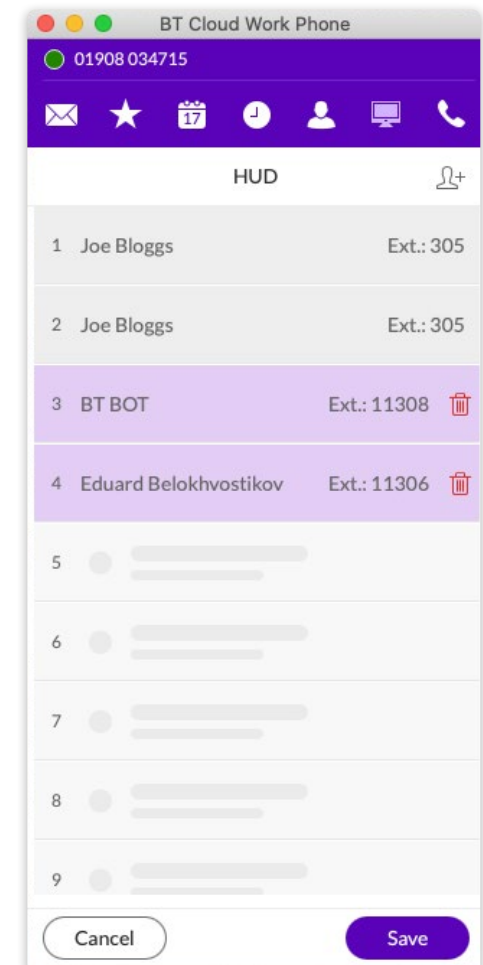
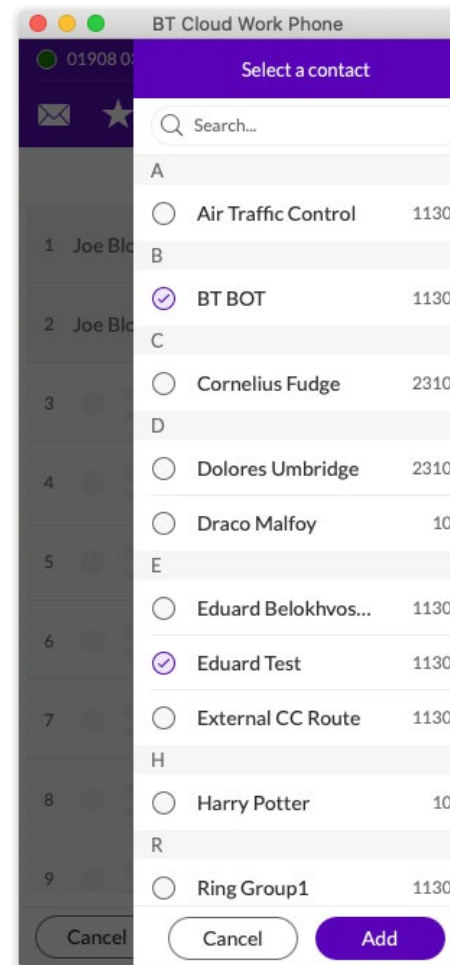
Head Up Display

How to add extensions to the HUD

1. Click the green 'Create' button (previous page). The 'Select a Contact' screen opens.
2. On this screen, place a check mark next to users you want to add to your HUD list, and click 'Add'.
3. Click 'Save'. You may see the warning message below. This alerts you that you will also change the settings in your online account for Presence Appearance if you continue.
4. If you click 'Continue', your HUD list will appear as shown on the screen to the right.
5. Click 'Save'.

Note: If the Presence Appearance is defined in the user's Office account, the HUD list will be set up automatically and synchronised to the user's Contacts list (User > Phones & Numbers > Presence > Appearance).

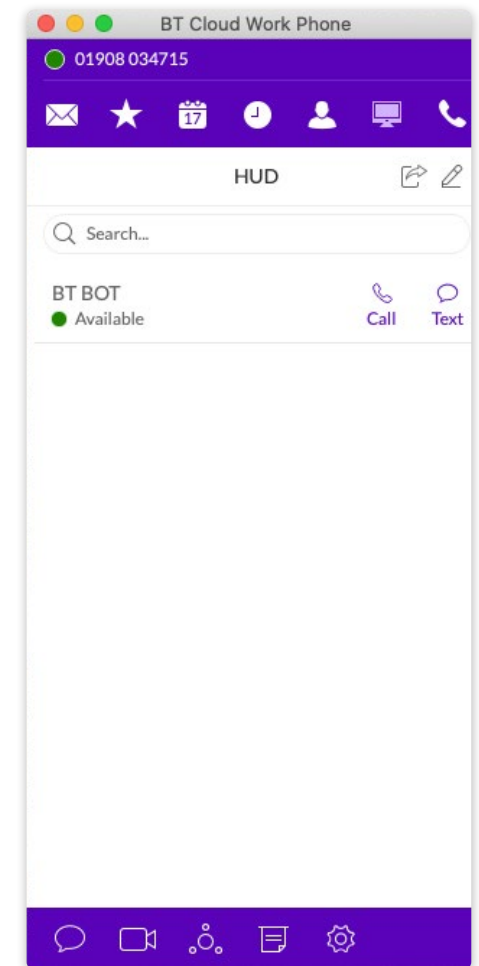
Click  ; then  on the HUD list to add more Contacts.



Head Up Display


There are many ways you can manage calls with HUD

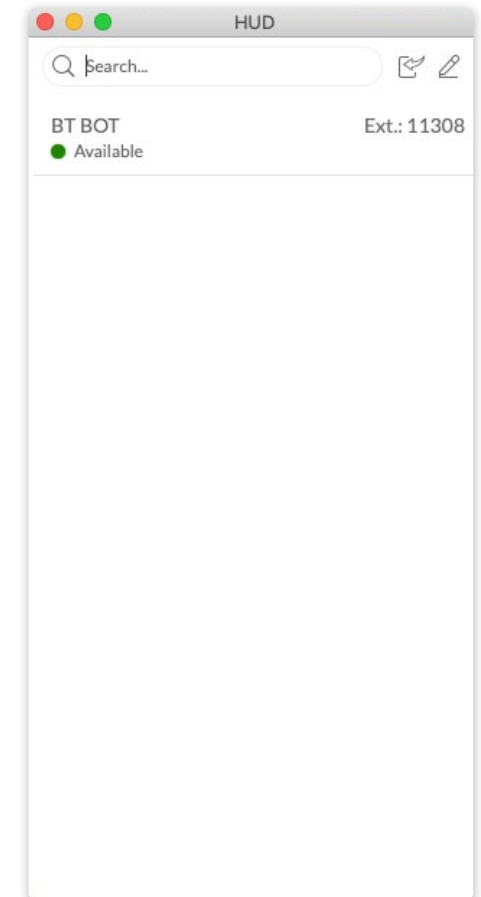
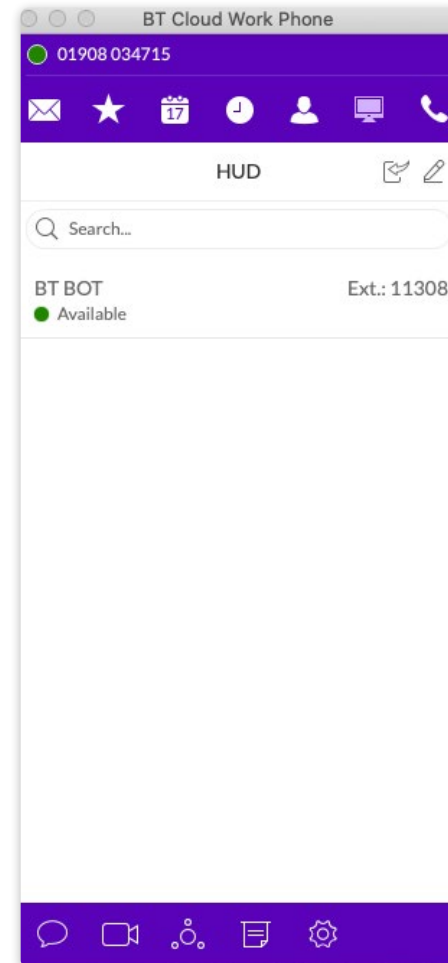
1. On the new HUD list, mouse over a name to place a call or send an Instant Message to the extension.
Example: Lee Lock, Ext: 2222.



Head Up Display

There are many ways you can manage calls with HUD

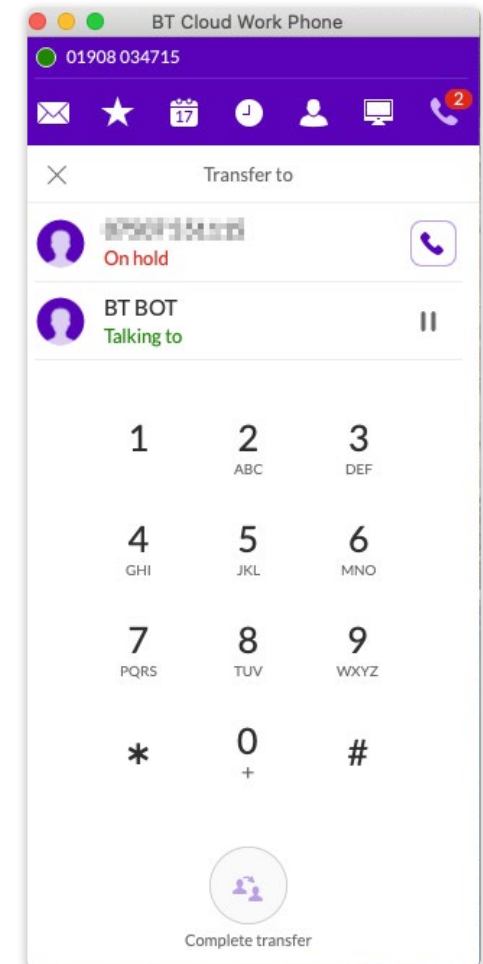
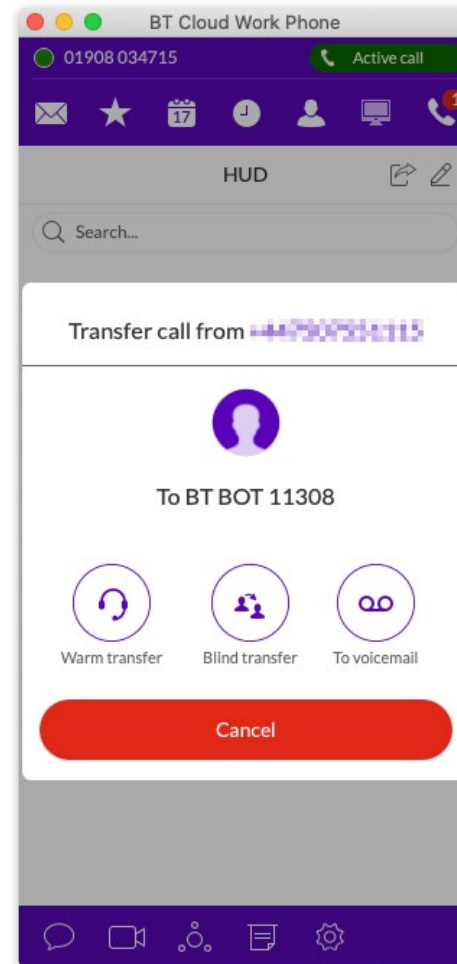
2. Click the 'Undock' icon  to see the complete HUD list in a separate screen for easy call handling. The HUD list can contain up to 100 extensions.



Head Up Display


There are many ways you can manage calls with HUD

3. During an active call, mouse over the extension (BT BOT 11308) to see additional options you can perform with HUD. These are Call, Message, Transfer, and Conference.
4. You can transfer → your active call to another extension by Warm Transfer, Blind Transfer, or To Voicemail.
5. With HUD, you can also instantly add 👤+ (conference in) users to your active calls, for example, adding Mary Goss to your current call with Ben Smith.

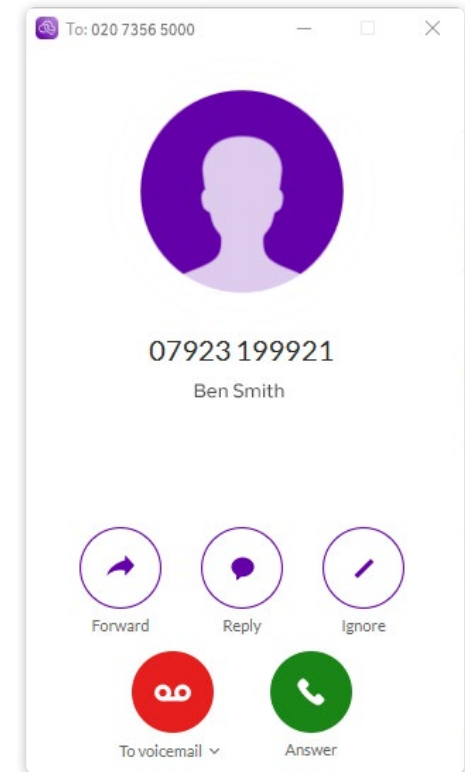
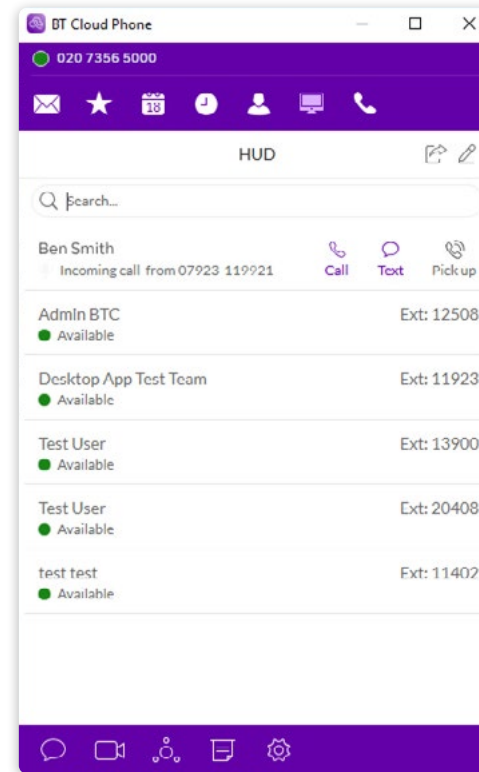
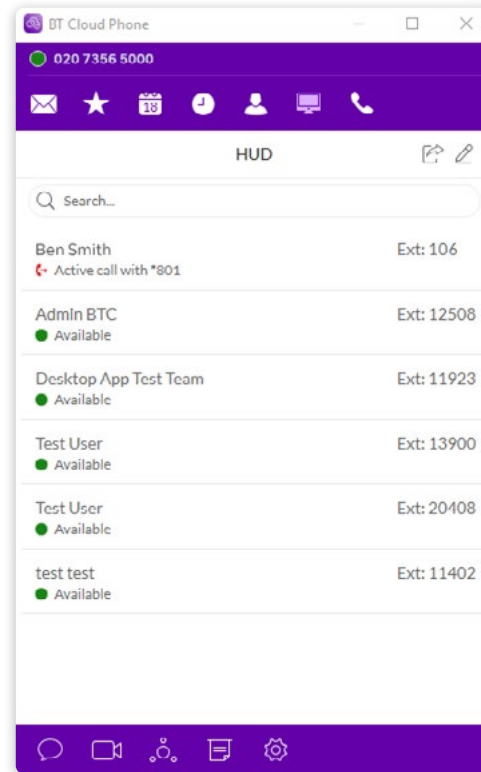


Head Up Display

There are many ways you can manage calls with HUD

6. To pick up an incoming call to an extension you have permission to monitor (example Ben Smith, Ext: 106), mouse over the extension to reveal the 'Pickup' option. Click  to handle the call.
7. On the example image, the person monitoring an extension can Forward the call, Reply to the call with a message, Ignore the call, or Pickup the call and answer it on behalf of the extension owner.

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



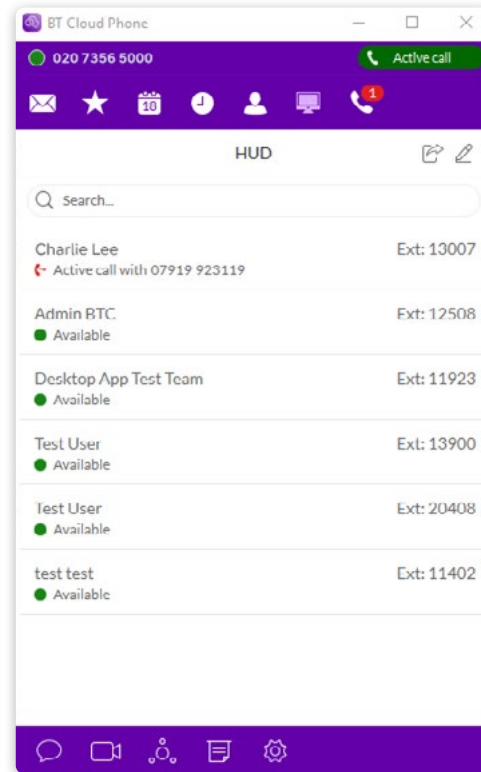
Head Up Display

HUD Call Monitoring

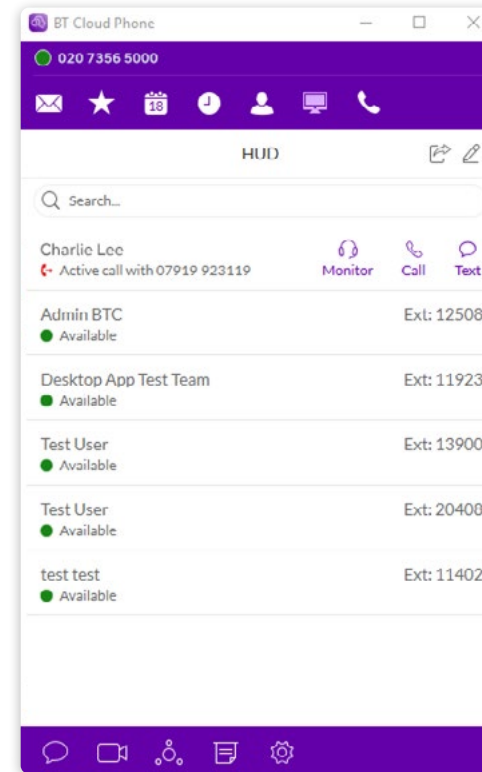
Incoming calls to an extension within the HUD list can be monitored if the extension owner has granted permission to the person who wishes to monitor that extension.

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

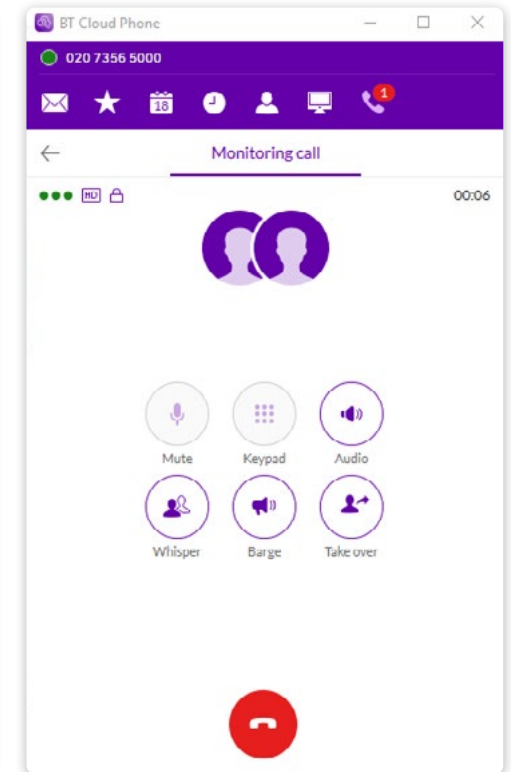
The supervisor can listen in and Whisper only to the agent, Barge in and be heard by both Agent and caller, or Takeover the call.



Agent Charlie Lee takes a call from a client.



Charlie's supervisor mouses over Charlie's extension and clicks 'Monitor' to listen in.



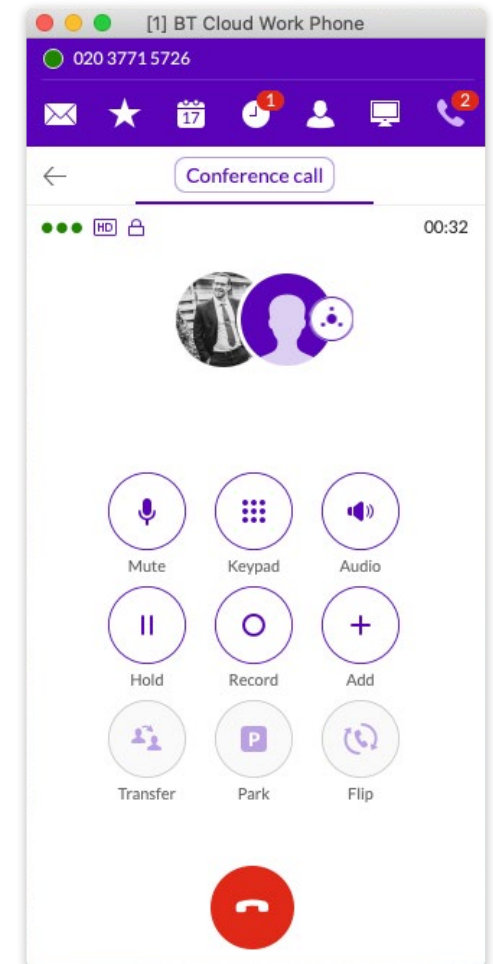
Charlie's supervisor has the option to Whisper to Charlie, Barge in, or Takeover the call.

Head Up Display

Active Call Layout

This screen for conference calls provides:

- Improved layout for all local calls in conference.
- An updated design that displays all parties in conference.
- Improved user interface and structure.



Head Up Display

Park Locations at HUD

To increase security, Park Locations is a feature on the App's HUD that allows you to park a call privately, so it can only be answered by selected users within the group.

Users within the designated group can pick up a parked call anywhere within the App, even when away from their desk.

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

Available Park Location is in bold typeface.



Mouse over Park Location and click it.

Call from 650-555-1555 is parked.

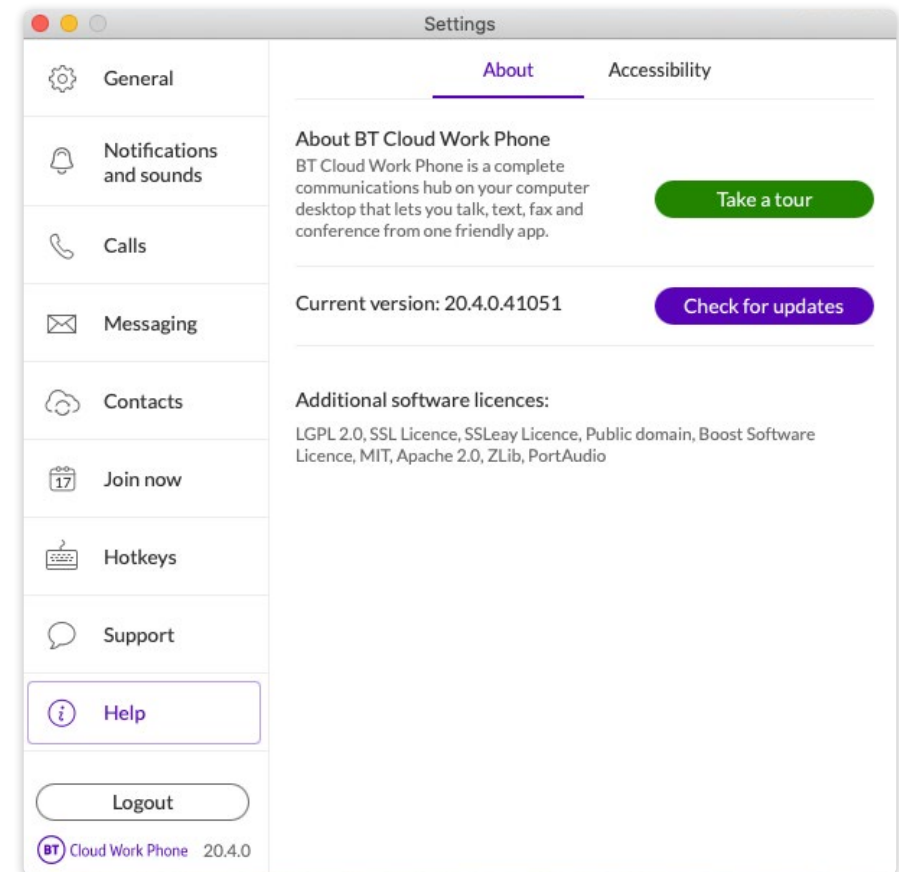
Mouse over parked call and click 'Pickup'.

Head Up Display

Check for Updates

Click , followed by  near the bottom left of the Settings screen.

Next to 'Current Version', click (Check for Updates button) to see if you have the latest version of the App installed.




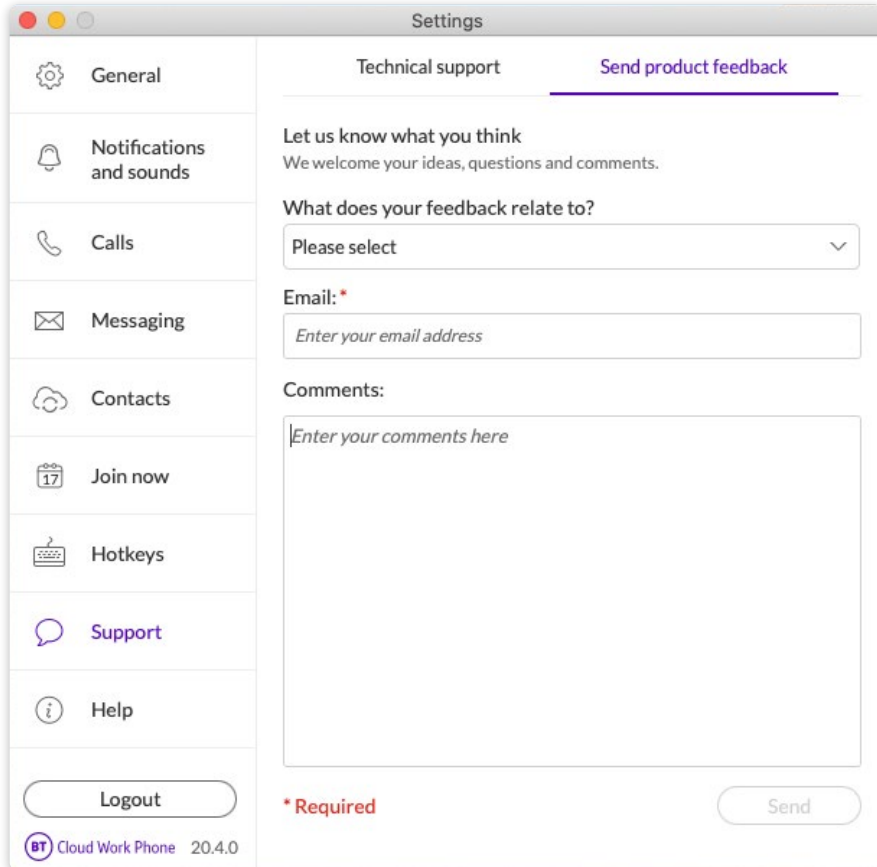
Give us feedback

We love hearing comments that will help us improve the BT Cloud Work Desktop App, so please don't be shy about telling us. Good or bad.

Here's how you can get in touch with us

Next to 'Current Version', click (Check for Updates button) to see if you have the latest version of the App installed.


1. At the bottom of the screen, click . The Settings screen opens in a separate window.
2. From the left menu, click 'Support' followed by 'Send Product Feedback'.
3. In the 'What is your feedback about' field, select the relevant topic.
4. In the 'Email' field, type your email address if you'd like us to respond to you.
5. In the 'Comments' field, type your feedback. Go all out. Let us know what's on your mind.
6. Once you've finished, click 'Send'.
7. Your feedback is sent to the teams at BT. While you might not get a response right away, fear not, we're on it. We review every bit of feedback that comes our way. If you included your email address, we might contact you for more details.
8. Feel free to send as much feedback as you like.



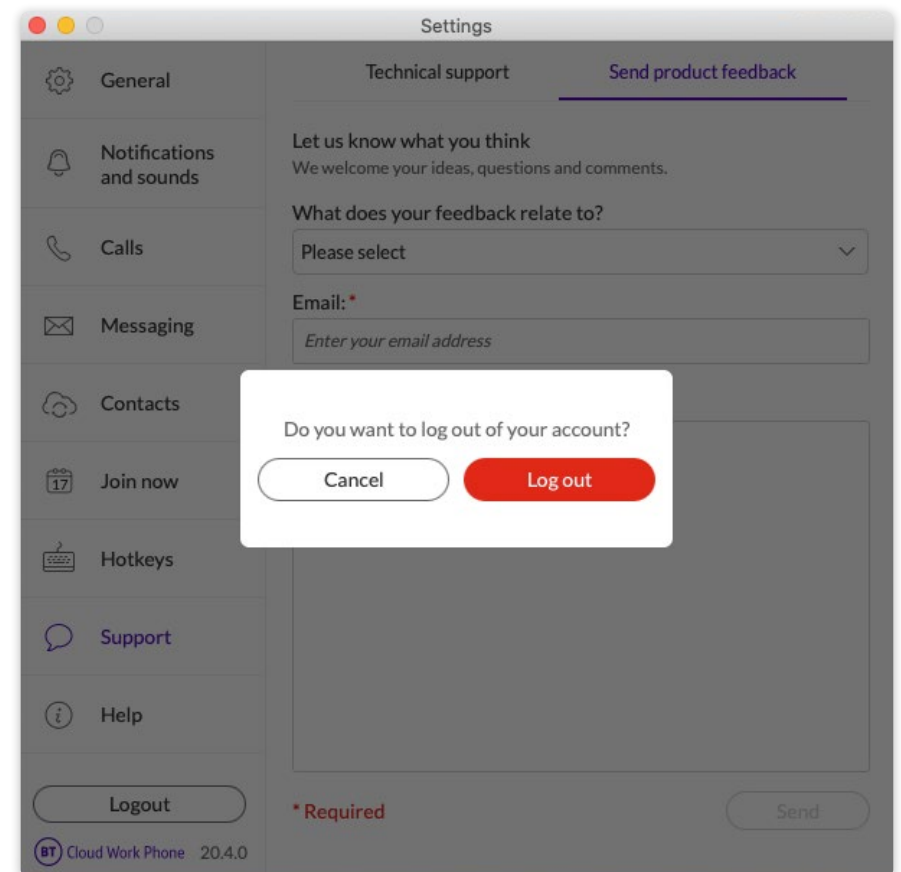
The screenshot shows the 'Settings' window of the BT Cloud Work Desktop App. The left sidebar contains a menu with the following items: General, Notifications and sounds, Calls, Messaging, Contacts, Join now, Hotkeys, Support (highlighted in purple), and Help. At the bottom of the sidebar are 'Logout' and 'BT Cloud Work Phone 20.4.0' buttons. The main content area is titled 'Send product feedback' and contains the following fields: 'Let us know what you think' (with a subtext 'We welcome your ideas, questions and comments.'), a dropdown menu for 'What does your feedback relate to?' (with 'Please select' and a downward arrow), an 'Email:' field with a red asterisk and the placeholder 'Enter your email address', and a 'Comments:' text area with the placeholder 'Enter your comments here'. At the bottom right of the form is a 'Send' button. A red asterisk and the word '* Required' are positioned to the left of the 'Send' button.

Log out of the App

When you're done with work for the day, you can log out of the BT Cloud Work Desktop App. Here's how:

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

Ta da! You've now successfully logged out and closed your App's working session. See you tomorrow.





Offices Worldwide

The services described in this publication are subject to availability and may be modified from time to time. Services and equipment are provided subject to British Telecommunications plc's respective standard conditions of contract. Nothing in this publication forms any part of any contract.

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