MyOfficeSuite Desktop App

USING THE MYOFFICESUITE DESKTOP APP TO BE MORE PRODUCTIVE
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Using the MyOfficeSuite Desktop App

The MyOfficeSuite Desktop App allows you to unify communications with a concise and convenient interface that is designed specifically for the desktop.

The desktop app will automatically start when your PC is turned on and will stay on in the background, so you are always connected to enable features, set services, click-to-call and chat…right from your PC! It even gives you an audible notification when you get a new voicemail or chat! This eliminates the need to log into the MyOfficeSuite portal to access your contacts and manage your services.

The desktop app will increase your productivity by allowing you to see the availability of your entire company and manage all of your communications from a simple application that is always on and available.

Homepage

Click the three horizontal bars on the top right corner of your Desktop App to view the menu options where you can manage your settings associated with your OfficeSuite® services. The menu options are explained in detail a little later in this document.

The bell icon will notify you if there is an alert. An alert is typically an informational message announcing new capabilities in MyOfficeSuite. An alert is represented by a number in a red circle over the bell indicating you have an alert that you have not read.

View your presence and chat status with the person icon. The dot on the left of the icon reflects your phone status (red means you are on the phone, green means you are not on the phone). The dot on the right reflects your Chat status settings (blue means you are available to chat, a clear circle with a line through it means you are unavailable to chat). Click on the icon to easily manage your Presence and Chat.

By default, MyOfficeSuite follows the status of the phone.

At the bottom of the homepage there are several icons to manage your OfficeSuite® features.
Contacts Icon

On the Contacts page, you will see a star, a bubble and a phone handset across from each name listed. Each represents a status for that individual.

**Star** – If the star is yellow, this means you indicated it as a favorite and the name will also be listed in the favorites tab.

**Bubble (Chat)** - The bubble represents the person’s chat presence.
The various colors mean:
Blue filled – available to chat
Grey with a line – offline; not available to chat
Red filled – you have a chat from the person associated with the red bubble
White with a red outline – a chat is awaiting me from someone who is offline

**Phone Handset** - The handset indicates the person’s availability to speak over the phone. The status for each variation is:
Green – they are logged in and available to speak
Red – they are logged in and on another call
Grey with a line through their name – they are not logged into an OfficeSuite® phone.

**Click-to-Call** – You need to have your phone available and logged in. Then, you click on the picture of the handset (click-to-call). Your OfficeSuite® phone (this can be an OfficeSuite® phone, PC Console, Softphone etc.) will start to ring and the distant end will begin to ring. The called party will either answer or you will be sent to coverage. This is no different than if you called from the phone, only now you have the added convenience of doing this all from one place (your desktop).
**Contacts Icon Continued**

**Favorites Tab**
Build your Favorites list by clicking on the star next to a person’s name in the co-workers tab or the personal tab. You can also move a group to your favorites list by clicking on the star across from the group name on the Group tab. Clicking the star turns it yellow, indicating the name is one of your favorites. The names will now also appear in your Favorites tab. Your favorite groups will be listed below your favorite coworkers.

**Coworkers tab**
The coworkers tab lists all the employees in your organization who have an OfficeSuite® extension.

**Personal Tab**
Use this tab to view and access personal contacts (personal contacts are added through the MyOfficeSuite portal). You won’t see the presence of your personal contacts, but you will have the added convenience of click-to-call (in order to have presence, the contact must belong to your organization's OfficeSuite® system). Click the personal contacts name, then click on the phone icon to activate click-to-call.

**Groups Tab**
As a user, you can create your own groups. Other users can also create groups and add you as a member. This tab lists all of the groups that you belong to. The user creating the group becomes the group administrator. MyOfficeSuite Administrators cannot change members of groups; only the user who created the group (ie. the group administrator) can add or remove members.

You can mark a group as a favorite so the group appears in the Favorites tab.

The double bubble represents group chat. You can click on this and the chat will be sent to the group members. If the double bubble is red, there is a chat awaiting you from one of the members of the group. All chats within the group can be viewed by all group members.

You are a member of a group if there is an informational icon across from the group name. Click on the icon and you can see who is the admin of the group, as well as a listing of all other group members. A pencil icon across from the group name indicates you are the admin of the group. Click the pencil to add and remove members, modify the group name or delete the group.
Calls Icon

Click on the calls icon to see the last 25 calls you made or received. You can click-to-call from the call log by clicking on the phone handset next to a number/name.

Voicemail Icon

From the voicemail icon, you can listen to your voicemail, return a call to the person who left a message, email the message to another person, or delete the message.

Chat Icon

Click on the Chat icon to start an individual or group chat, initiate a call to an individual (not to a group) or delete the chat.
(Fly Out) Icon

Click on the fly out to bring up two options: HD Meeting and Dialpad.

If you are logged into your HD Meeting account when you click the HD Meeting icon, the HD Meeting app will pop up allowing you to make use of all HD Meeting features, including scheduling, joining and starting meetings. If you are not logged into HD Meeting when you click the icon, you will be brought to the HD Meeting login screen. Contact your Administrator for an HD Meeting license if you don’t already have one assigned to you.

If you select dial pad, you will be able to place a call by typing the number or clicking on the numbers on the dialpad. The call will be activated on your OfficeSuite® device.
**Application Settings**

You can choose whether you want the X to minimize the app so that chat is "always on" or close it out entirely. Changing the application settings is easy. Simply right-click the MyOfficeSuite Icon in the system tray to launch the application settings.

Other enhancements include a blinking task-bar icon and a flashing window frame to help ensure that you never lose sight of incoming chats, newly received voicemails, and system-generated alerts while the application is minimized or tucked behind other windows.
**Menu Options**

Click the three horizontal bars on the top right corner of your Desktop App to view menu options where you can manage your settings associated with your OfficeSuite® services.

Use the scroll bar on the right to see all menu options.

Clicking on the ‘Home’ menu option returns you to the main screen of the Desktop App.
**My Email**

Clicking on the MyEmail menu option lets you save your OpenExchange Email Settings. If you have purchased OpenExchange Email with us, you can enter your email address. After you have saved your OpenExchange settings, you can check your Email from the Email widget on the MyOfficeSuite portal dashboard page.

**Do Not Disturb**

By default, Do not Disturb is set to ‘Off’. You can click ‘Off’ to turn Do Not Disturb ‘On’. By doing this, all incoming calls will be sent directly to your voicemail.

If you have multiple OfficeSuite® extensions, you can click on ‘Do Not Disturb’. The following screen appears. Click the drop down arrow to choose the OfficeSuite® extension you wish to set to Do Not Disturb. Make sure to press ‘Save Do Not Disturb Settings’ before returning to the home page or the menu.
**My Call Twinning**

My Call Twinning enables incoming calls to ring your OfficeSuite® phone and another phone simultaneously. Press the toggle to turn twinning on or off. This assumes you have already entered a phone number to ring simultaneously. If you have not, then click My Call Twinning and follow the steps below.

If you have multiple OfficeSuite® extensions or need to set the number you wish your incoming calls will ring simultaneously, click My Call Twinning. The following screen appears. Click on the drop-down list to choose the OfficeSuite® extension you wish to set to Do Not Disturb. Then press the toggle to enable Twinning. Enter the phone number, including area code, you wish to ring simultaneously. Then press Save Twinning Settings.

**My Call Forwarding**

Click My Call Forwarding to forward your OfficeSuite® extension. Choose the OfficeSuite® extension you wish to forward from the drop-down list. Then choose the number of rings before forwarding. You can pick a number from 1–20. Then, choose how you wish to forward: directly to voicemail, an auto attendant, another extension, another phone number, or no call forwarding. If an auto attendant or another extension is chosen, another field will appear where you can pick the extension or the auto attendant from a drop-down list. Once you have chosen your forwarding option, click Save Call Forwarding Settings. If you want to turn call forwarding off, choose No Call Forwarding from the forwarding options drop-down list, then click Save Call Forwarding Settings.
Voicemail Settings

Select Voicemail Settings to set your voicemail notifications or change your voicemail PIN. First, select the OfficeSuite® extension from the drop-down list that you want to set notifications for or change the voicemail PIN. For notifications, click Voicemail Notifications. Press the toggle to turn on notifications. Enter the email address in the notification email field. Then, choose the notification type. You can choose audio file only, audio file with transcript, or No Audio. If you want to add a second notification email, click Add Additional Notification and enter in another email address and choose your notification type. You can enter up to 10 different email addresses to notify of a new email. Then, press Save Notification Settings.

Under My Voicemail, you can also change your voicemail PIN. Enter in a new PIN. Then, re-enter your new PIN in the Confirm New PIN field. Next, enter your portal password. This is your password to MyOfficeSuite. Press Save New Voicemail PIN to set your new PIN. Visit the OfficeSuite® Community for more information on PIN requirements.
**Multi-Desking**

Multi-Desking gives you the ability to be connected to more than one device via the same extension. The company administrator has to turn multi-desking on for users. Once you are logged into more than one device, you must determine which device is the click-to-call originator and the intercom recipient. You can also log out without being near the physical device. You can change these settings at any time.

**My Softphone**

If you have a Softphone license, you will see a menu option for ‘My SoftPhone’. If you are logged into your softphone and click this menu option, your softphone console will pop up on your screen. If you are not logged into your softphone and you click ‘My SoftPhone’, the softphone login screen will pop up on your screen.
My HD Meeting

You can use HD Meeting to start a meeting or join an HD Meeting. You must purchase an HD Meeting license to start a meeting. If you do have a license, you need to associate your HD Meeting personal meeting ID (PMI) with your email address in order to use the HD Meeting option. You can do this through Account Settings > HD Meeting Settings in the Desktop App, or you can log into the MyOfficeSuite portal.

Under Account Settings, click HD Meeting Settings to expand that section. Enter your email address associated with your HD Meeting license and your PMI. Then, press Save HD Meeting Settings.

If you are logged into your HD Meeting account when you click the My HD Meeting menu option, the HD Meeting app will pop up allowing you to make use of all of the HD Meeting features, including: scheduling, joining and starting meetings. If you are not logged into HD Meeting when you click the icon, you will be brought to the HD Meeting login screen. Contact your Administrator for an HD Meeting license if you don’t already have one assigned to you.

In the MyOfficeSuite portal under the Settings tab, choose My Account Settings. Scroll down to HD Meeting Settings. Enter in your HD Meeting email address and your PMI, then press Save.
OfficeSuite Community

OfficeSuite® Community enables our customers and employees to collaborate on answers, solutions and ideas about the OfficeSuite® products and services you use. Once you are a member, you can ask a question, submit a product idea, or share feedback.

Click on the OfficeSuite® Community menu option. If you are already a member, sign in using your Community login credentials. If not already a member, follow the steps below to get started.

**STEP 1:** Click “Register” (upper right)

**STEP 2:** Login using your Facebook or Google credentials or click «Or Register» to create an account.

**STEP 3:** Fill in your name and email address, create a password, type in the words you see and click Sign up.

**STEP 4:** You will receive an email from “Get Satisfaction” who powers our OfficeSuite® Community. Please click on the “confirm my email address” link which is at the bottom of that email.

Company Settings

If you are a Tenant Administrator, you will see a menu option called ‘Company Settings.’ Use this option in an emergency to quickly enable all of the emergency overrides setup for your organization by clicking Enable Emergency Overrides. You can also revert back to normal call routing by clicking Disable Emergency Overrides.

Emergency Overrides can be setup in the MyOfficeSuite portal using the Incoming Call Routing widget on your dashboard.

Account Settings

Under the Account Settings menu option, you can manage your contact information and other settings tied to your OfficeSuite® services.

Click on each option to expand each section. Under Name and Contact Info, you can change your name, email address and contact phone number.
Account Settings Continued

Under Change Extension PIN, you can change the PIN associated with your extension and apply the same PIN to your voicemail if you wish. Enter the information requested; choose whether to apply a new PIN to your voicemail, then press Save New Extension PIN.

HD MEETING SETTINGS

Enter your email address associated with your HD Meeting license and your PMI. Then, press Save HD Meeting Settings.

CHAT NOTIFICATIONS

Choose whether to show a preview of chat messages in your notifications by toggling the on/off switch. When you receive a chat, you will see a notification in a white box appear in the lower right hand corner of your screen.

Under OpenExchange Settings, choose whether to associate your OfficeSuite® email address or a different email address. Follow the instructions on the screen. Make sure you save your OpenXchange Settings.
WE ARE HERE TO HELP! PLEASE CONTACT US AT:

Phone: 888.623.VOIP (8647)
Email: officesuitesupport@broadviewnet.com
Live Chat: Chat live with us via the portal.
Just click on Live Help on top of the MyOfficeSuite Dashboard
http://MyOfficeSuite.broadviewnet.com

Contact Us
Use this menu option if you want to send a comment to us. Use the comment box to type your remarks, then simply hit send. Your name, company name and contact information is pre-populated for you.

Sign Out
Use this menu option to sign out of the Desktop App