

# Toolbar

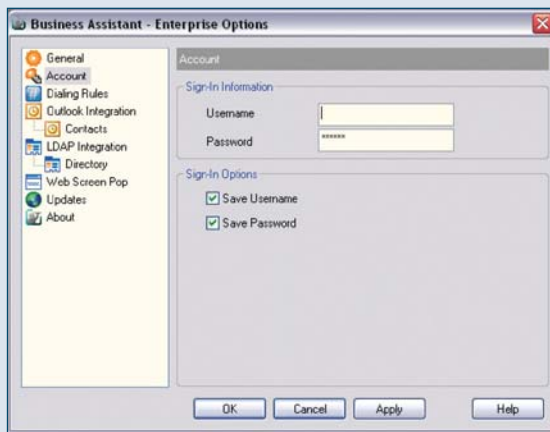
## Quick Reference Guide



### GETTING STARTED

You can configure your Toolbar 'Log In' account details through the options dialog.

1. On the toolbar, click Options.
2. Select the 'Account' option and enter the username and password that has been supplied.

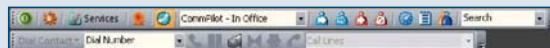


### The Toolbar

Assistant-Enterprise Toolbar for Internet Explorer or Firefox:



Assistant-Enterprise Toolbar in Outlook:



### Log In and Log Out

To log in, click Login. To log out, click Login again.

### Dial Number

In the Dial Number box, type the number you want to call. Press ENTER.

### Redial Number

You can redial up to 10 previously dialed numbers.

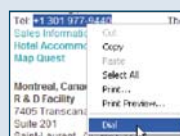
1. Click the arrow at the right-hand side of the Dial Number box.



2. On the Dial Number list, click the number you want to redial.
3. Press ENTER.

### Dial from Web Page (Internet Edition)

1. On a web page, select a phone number.
2. Highlight and right-click the number.
3. On the shortcut menu, click Dial.



### Dial from E-mail (Outlook Edition)

You can dial a contact directly from an Outlook 2003 e-mail message.

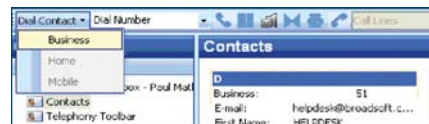
**NOTE:** This feature is not supported in Outlook 2007.

1. Open an e-mail that contains the number you want to dial.
2. Make sure the e-mail is either an open message or a preview in the HTML format.
3. Highlight and right-click the number.
4. On the shortcut menu, click Dial.

### Dial from Contacts (Outlook Edition)

Assistant-Enterprise within Outlook, allows you to dial the Business, Home, or Mobile number of any Outlook contact.

1. In the list of folders, click Contacts.
2. From the Contacts list, select the contact you want to call.
3. On the Assistant-Enterprise toolbar, click the arrow at the right-hand side of the Dial Contact list.
4. Select the type of number to call (Business, Home, or Mobile).



### Dial from Group Directory

1. On the Assistant-Enterprise toolbar, click Group Directory.
- On the list that appears, click the desired phone number.

### Dial from Speed Dial Directory

1. On the Assistant-Enterprise toolbar, click Speed Dial.
- On the list that appears, click the desired phone number.

### Dial from Call History

1. On the Assistant-Enterprise toolbar, click Call History.
2. On the list that appears, click the desired phone number.

### Dial from Search


1. In the Search box, type your search criteria or click the arrow at the right-hand side of the Search box and select a previous search from the list.
2. Press ENTER. Assistant-Enterprise displays the results of your search.
3. Click the phone number you want to dial.

### Call Notification

When you initiate or receive a call, Assistant-Enterprise displays a notification window above the system tray, which includes the other party's identification from BroadWorks or Outlook directories.




## Answer Call

In the toolbar, click Answer  or click the Call Notification window.


## Blind Transfer

Calls can be blind transferred while active, held, or ringing in.

1. Call the destination number. This automatically puts the first party on hold if the first party is not already on hold.
2. Click Transfer. 



## Consultative Transfer

Calls can be transferred with consultation while active, held, or ringing in on your phone.


1. Call the destination number. This puts the first party on hold.
2. Wait until the called party accepts your call, and then click Transfer  to connect the parties.

## End Call

You can end incoming and outgoing calls from the toolbar and from the Call Notification window.

Click End  on the toolbar or click End Call  in the Call Notification window.

## Save vCard

To save the caller's phone number and personal information as a vCard in Outlook, in the Call Notification, click Add vCard. 

## Hold Call

1. On the Call Selector list, select the call to hold.

Click Hold. 

## Unhold Call



1. On the Call Selector list, select the held call.

Click Answer. 

## Initiate Conference

You can initiate a conference with two parties.

All calls on the Call Selector list are added to the conference.

1. Click Conference. 
2. To add incoming or outgoing calls to the conference, click Conference.
3. To drop a conference participant, select the participant's number on the Call Selector list and click End. 

## Transfer Call to Voice Mail

You can transfer calls to your voice mail from the toolbar and from the Call Notification window.

To transfer to voice mail, click Transfer to Voice Mail  either on the toolbar or in the Call Notification window.

## Retrieve Voice Mail

To listen to your voice mail:

1. Make sure that you are not currently engaged in a call. No entries must be present on the Call Selector list.

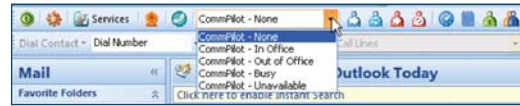
Click Transfer to Voice Mail  on the toolbar.

## Set Your CommPilot Express Profile

CommPilot Express allows you to manage your calls based on your schedule using four configurable profiles: In Office, Out of Office, Busy, and Unavailable.

1. Select a profile from the CommPilot drop-down list on the toolbar.


To disable all profiles, select CommPilot – None.

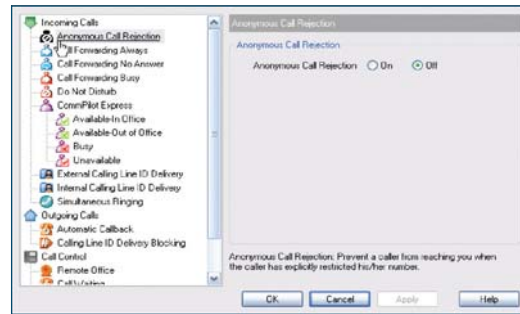


## Change Services Settings

The Services dialog allows you to easily change your service settings for telephony services, such as such as Voice Messaging, CommPilot Express profiles, Call Forwarding, and Call Waiting.







**NOTE:** Only the services you have assigned to you will be accessible and configurable.

1. On the toolbar, click Services. 
2. On the left-hand side of the Services window, select the tab of the service you want to configure.
3. On the right-hand side, select or fill out required information.




## Access Services Settings

Frequently-used services are represented on the toolbar by their own buttons for easy access:

-  Call Forwarding Always
-  Call Forwarding No Answer
-  Call Forwarding Busy
-  Do Not Disturb
-  Remote Office
-  Simultaneous Ringing

By clicking a button, you can set the corresponding service on or off.

## Call Selector

The Call Selector  is a drop-down list that shows current calls and lets you pick the call you want to perform the action on, but does not switch the call.