|  |  |  |
| --- | --- | --- |
| **Topic** | **In-the-Lync Client** | **In the CX600 Phone** |
| **Creating Contact Groups** | 1. Click the **Contact Icon** below your picture. 2. Move down and right-click any   **Contact Group Name** such as  **Frequent Contacts** or **Other Contacts**.   1. Move down to a choice near bottom called “**Create New Group**”. 2. Type new group name 3. Right –Click on any person in your Lync Client. 4. Scroll down to **Add to Contacts List** | **Contact Groups** are best created in the Lync Client |
| **Displaying Contact Groups** | 1. Click the triangle to the left of any **Contact Group Name**. 2. See the group list roll up 3. Click & Drag any group name up or down in the list. | Contact Group display is best controlled in the Lync Client |
| **Transfer**  **(Blind)** | 1. Make a call; once connected… 2. See call window appear 3. Click transfer arrow 4. Choose **Transfer to Others** > **Another Person or Number** | 1. Make a call; once connected… 2. Hit the MENU button 3. Scroll to the **Transfer Directly** option. 4. Select then choose…    1. Start dialing a number    2. Search for a number    3. Go to Home Screen; scroll to Contacts icon; select a contact. |
| **Transfer (Consultative)** | 1. Answer a call 2. Announce that you’ll transfer… 3. Start dialing new call…see orig call On Hold. 4. When new answers, consult, then … 5. Use transfer button at corner of New call; see current conversations.   Both parties will be connected to each other, and you will be disconnected from both. | 1. Make a call; once connected… 2. Hit the MENU button 3. Scroll to the **Consult then Transfer** option. Select it. 4. Choose…    1. Start dialing a number    2. Search for a number    3. Go to Home Screen; scroll to Contacts icon; 5. Hit **Consult** to dial **New Number** 6. See the original call OnHold & New Call begin to ring; once connected to new call… 7. See **Transfer** option (bottom right) in display |
| **Impromptu/Informal Conferencing** | 1. Find the **Gear** (top right)… 2. Choose **Meet Now** -this will open a conference window. You can now drag & drop any other LYNC contacts into your conference window - OR - use the transfer button to **Invite by Number** (any local number you would like to invite into the conference). | Any time you have 2 or more calls on your screen, you may hit MENU and choose…   1. **Merge Calls** -this will conference **you** and your **current caller** together with all/any callers **On Hold.** 2. **Add Others –** this will let you add **others** to **your current conversation** btw 2 people. |
| An Incoming Call Will **NOT** Ring your Phone if… | Your Status is ***Do Not Disturb***  Or  Your number is ***Forwarded*** | Your Status *in the Lync client*  has been set to ***Do Not Disturb***  Or  Your number is ***Forwarded*** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |