## 5 Tips for Week 1

**AT A GLANCE**

<table>
<thead>
<tr>
<th>Dialpad Permission</th>
<th>Skill Level</th>
<th>Try It Out</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>Medium</td>
<td>Desktop, iOS, Android</td>
</tr>
</tbody>
</table>
Introduction

Dialpad Talk helps you stay connected with a cloud phone system that works in real-time, across all your existing devices, to deliver voice, video, and messages.

Let’s take a closer look at 5 best practice tips for getting started with Talk in your first week.
#1 Switch Between Devices

Need to step out of the office but on a call? Talk automaticallysyncs across all your devices in real-time so switching between themis a snap.

Switch to Mobile

1. Open the mobile app (iOS or Android)
2. Tap on the Active Call displayed in your Recent view
3. Tap on Switch Call to this Device
4. The call is now being handled on your mobile

Switch to Desktop

1. Select the active call on your desktop app
2. Select Switch to this Device
3. The call is now being handled on your desktop

Switch to Desk Phone (Poly Obi-Edition)

1. Select Switch Mode on your Poly
2. The call is now being handled on your desk phone

And the best part? Your caller won’t notice a thing.

#2 Connect Your Apps

By now you’ve probably noticed the sidebar integrations within the desktop app (also available on iOS and Android apps).

Connecting these to your contacts allows you to get even more context for your conversations—like the last email shared between you and your colleague or an open Salesforce opportunity.

Desktop App

1. Select a contact within Talk to open the conversation view
2. Select the sidebar to expand
3. Under the specific integration, select Connect
4. Follow the flow to connect and authorize your account
5. The sidebar will automatically refresh with the now connected integration

Talk Tip: Once you connect the integrations in your sidebar, you won’t have to re-authenticate for every contact. This also applies to mobile—do it on desktop and you’ll see it reflect on your iOS or Android.
Sample integrations include:

- **Google**
  - Includes shared files, emails, and docs
- **Microsoft**
  - Includes shared files, emails, and docs
- **Salesforce**
  - Includes activity logging field, past activities
- **Zendesk**
  - Includes activity logging field, past activities

Desktop apps will display integrations when viewing a conversation thread or on an active call—for mobile apps, tap into your contacts **Profile** to scroll through the connected apps.

### #3 Use Dialpad Everywhere

You’ve probably already noticed Dialpad Everywhere—our floating call UI that keeps you focused on the screen you need to be.

Just place an outbound call on your desktop and click outside of Talk to see it appear automatically.

What’s included with Dialpad Everywhere?

<table>
<thead>
<tr>
<th>Caller ID</th>
<th>Caller name, phone number, title (if available)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Call Controls</strong></td>
<td>Mute, Hold, Keypad, Transfer, Add Caller, Record, Hangup</td>
</tr>
<tr>
<td><strong>Vi (Voice Intelligence)</strong></td>
<td>Real-time transcription</td>
</tr>
<tr>
<td><strong>Integrations</strong></td>
<td>G Suite, Office 365, Salesforce, Zendesk, etc.</td>
</tr>
</tbody>
</table>

### #4 Try a Quick Search

By now you’ve connected with a few different people, either in or outside of your office, to give you some contacts and messages to search.

Talk search allows you to search both for people and messages (including keywords) to quickly access what you need.

**Desktop App**

1. Click into the search bar
2. Enter your contact’s name or keyword if searching by message
3. Select your contact or message from the list to view
iOS App
1. Tap the search icon
2. Enter your contact’s name or keyword if searching by message
3. If searching by message, tap History
4. Select the contact or message from the list to view

Android App
1. Tap the search icon
2. Enter your contact’s name or keyword if searching by message
3. Select the contact or message from the list to view

#5 Check Out Your Inbox

Think of your Talk inbox as the single place for notifications: missed calls, messages received, voicemails, even recordings—you’ll find it all here, and then some.

On either your desktop or mobile apps, select Inbox to review each tabbed section.

<table>
<thead>
<tr>
<th>New</th>
<th>New notifications. Can include messages, missed calls, etc. To dismiss, click the checkbox icon on the far right.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calls</td>
<td>Historical list of all calls received or placed. Includes video calls.</td>
</tr>
<tr>
<td>Missed</td>
<td>Historical list of all missed calls. Includes video calls.</td>
</tr>
<tr>
<td>Voicemails</td>
<td>Historical list of all voicemails received. Includes audio playback and transcription (specific plan type required).</td>
</tr>
<tr>
<td>Recordings</td>
<td>Historical list of all call recordings. Includes audio playback</td>
</tr>
<tr>
<td>Messages</td>
<td>Historical list of all messages sent and received.</td>
</tr>
<tr>
<td>Faxes</td>
<td>Historical list of all faxes sent and received.</td>
</tr>
<tr>
<td>Flagged</td>
<td>List of all flagged messages and calls. To flag something in your inbox, hover over the line item and select the drop-down arrow to reveal this option.</td>
</tr>
<tr>
<td>Spam</td>
<td>Historical list of all calls deemed spam (either by our system or by the individual user).</td>
</tr>
<tr>
<td></td>
<td>To mark something as not spam, hover over the line item and select the drop-down arrow to reveal this option.</td>
</tr>
</tbody>
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