



Fuze Desktop/Web Chat

Fuze Enablement Team

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Chat Training Objectives

After attending this training, users should have a basic understanding of:

- Application overview, signing in, and desktop layout
- Setting presence status, signing out, and accessing help
- Sending messages, creating group chats, and searching chats
- Inviting and managing guests
- Configuring settings

Chat Application Overview

Overview

Fuze Desktop and Web Chat offers the ability to exchange information between colleagues within an organization and invite external contacts to communicate via instant messaging (IM).



Signing into Fuze Desktop and Fuze Web

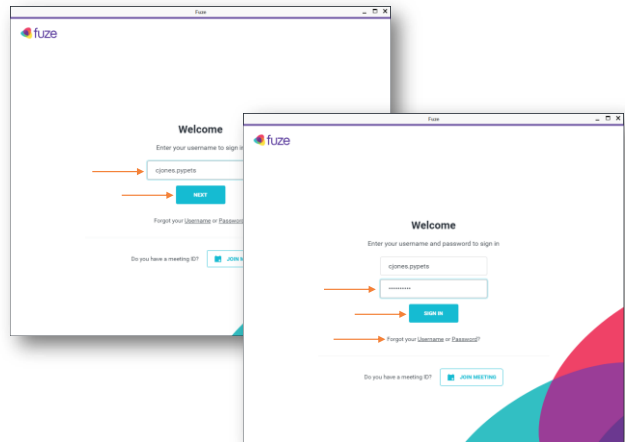
- Launch the Fuze application

OR

- Browse to web.fuze.com
- Enter username and then click the **NEXT** button
- Enter password and then click the **SIGN IN** button



If username or password have been forgotten, use the provided links.

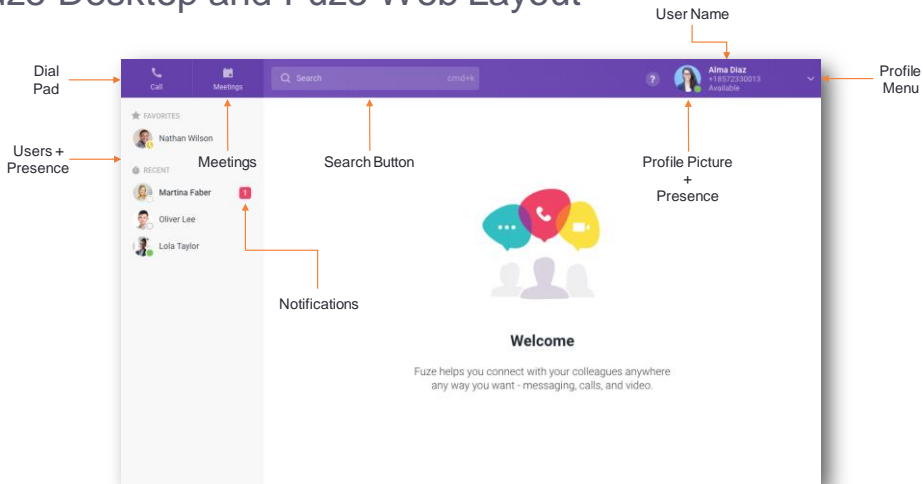


New user's will receive a **Get Started** message upon signing into Desktop. A **Setup Checklist** will appear in Fuze Desktop allowing the user to make a test call, choose the preferred device for making calls, the ability to add a picture, connect Google or Office 365 accounts to import contacts and calendars, and the option of setting up voicemail.

In Fuze Web, the **Setup Checklist** will include options to choose a preferred device for making calls, adding a profile picture, and connecting a Google and/or Office 365 account to import contacts and calendars.

If the username has been forgotten, the work email address will be used for retrieval. If the password has been forgotten, a magic link will be sent to the users registered email address, in order to reset it.

Fuze Desktop and Fuze Web Layout



Fuze Desktop offers the ability to re-size the screen and make it smaller by clicking on the Restore button in the upper-right of the screen. Once made smaller, a user may drag and move Fuze Desktop anywhere on the screen. Fuze Desktop will automatically collapse the sidebar to showcase more of the content on the screen.



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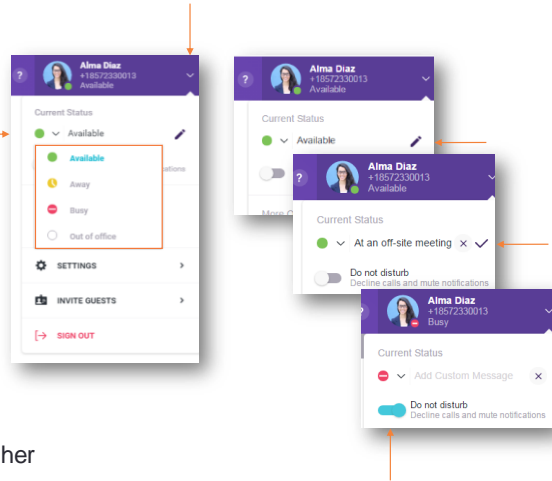
Setting Presence Status

Status describes current availability.

- Click the profile dropdown menu and then click the **Current Status** dropdown
- Select the applicable status option
- Optionally, click the  icon, enter custom message details, and then click the  icon
- Click the **Do not disturb** toggle to decline incoming calls and mute notifications



Manually setting presence will override all other presence options.



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When on a phone call, the status indicator will change to **Busy** with a message of **On a call**. When in a Fuze Meeting, the status will change to **In a Meeting**. When the toggle is turned on for a Google or Office 365 calendar event, the status will be set to **Busy**. After 20 minutes of inactivity, Fuze Desktop will automatically change the status from **Available** to **Away**.

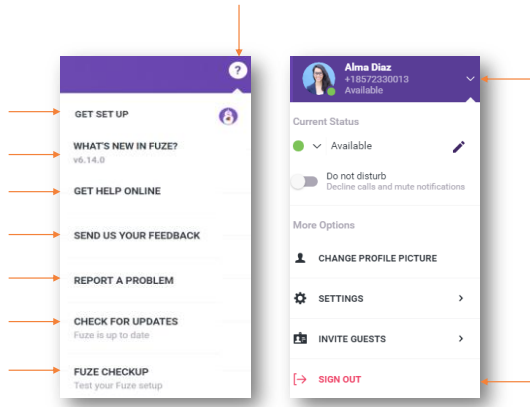
Accessing Help and Signing Out

The help feature allows a user to interact with Fuze or view application information.

- Click the  icon
 - **GET SET UP**
 - **WHAT'S NEW IN FUZE?**
 - **GET HELP ONLINE**
 - **SEND US YOUR FEEDBACK**
 - **REPORT A PROBLEM**
 - **CHECK FOR UPDATES**
 - **FUZE CHECKUP**

Signing out will set the user's status to offline.

- Click the profile dropdown menu
- Select **SIGN OUT**



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GET SET UP - allows the user to make a test call, choose which device will be used to initiate calls from Fuze Desktop, add a picture, set-up voicemail, or connect accounts
WHAT'S NEW IN FUZE? - provides a list of new features or bug fixes
GET HELP ONLINE - directs a user to the Fuze Help Center page (<https://help.fuze.com>) for the most recent product resources
SEND US YOUR FEEDBACK - allows a user to submit feature suggestions for upcoming releases
REPORT A PROBLEM - allows a user to report a Fuze Desktop problem
CHECK FOR UPDATES - allows a user to upgrade to the latest version of Fuze Desktop
DOWNLOAD FUZE DESKTOP (Fuze Web Only) – directs a user to <https://www.fuze.com/download>, where there is the ability to download the desktop application for Windows or Mac
FUZE CHECKUP – confirms a users account and network conditions will reliably support placing calls and participating in meetings

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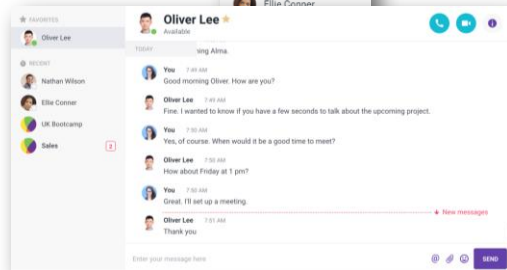
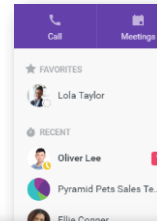
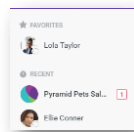
Receiving Instant Message Notifications

A red indicator **1** will appear to the right of the contact's name indicating an unread message.

- Click the contact's name to view the unread messages




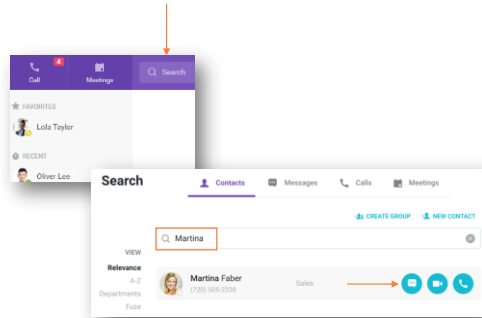
Unread group messages are designated by a red indicator outline **1** which will appear to the right of the group name.





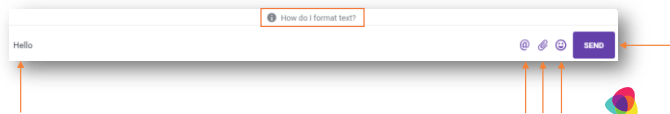
The digit inside the rounded square indicates the number of unread messages received from the contact.

Sending an Instant Message

- Click the **Search** button
- Type the name of the contact to search for
- Hover over the contact to see options and then click the message  icon
- Enter text in the message field and then click the **SEND** button or press Enter to send
 - An option to format text will appear above the message when typing a minimum of three characters



Click the @, , or  to mention someone, send a file attachment, or add an emoji.



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Searches can be performed by name, phone number, or extension. Users can also right-click while composing a message to undo, cut, copy, paste, delete, and use spellcheck. A file of up to 100 MB in size or a link to a file located within a connected account can be sent using Fuze Chat. As a message is being typed, any spelling errors will be identified by a red underline. Right-click on the misspelled word and alternative replacement options will be made available from the pop-up menu.

Users can hover over any sent message to add reactions to, edit, or delete the message. All available emojis in Fuze Desktop can be used when adding reactions to a message.

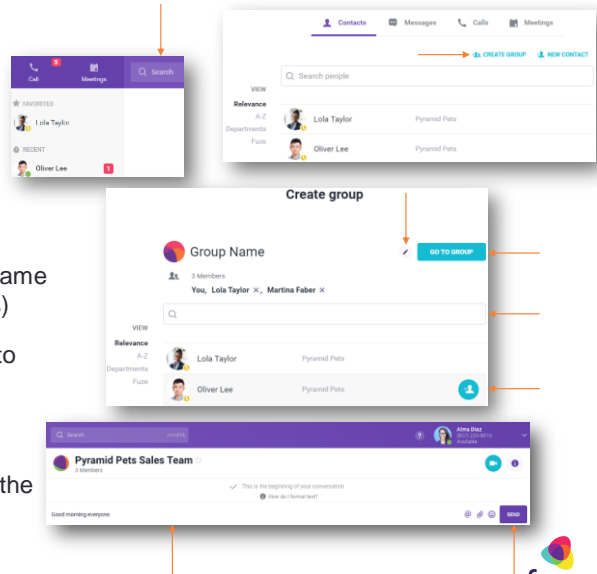
Once a user has clicked on the @ icon, selected a name, and sent the message, both the user and the person receiving the message, has the ability to hover over the mentioned name and send a message, call, video conference, see profile (Contact Insights), or create a group.

A variety of emojis are available, sub-divided into types.

Creating a Group Chat


A group chat will allow a user to message multiple participants at the same time.

- Click the **Search** button
- Click **CREATE GROUP**
- Click the ✎ icon to add/edit the group name (required for greater than 12 participants)
- Search for and select the names to add to the group
- Click the **GO TO GROUP** button
- Enter text in the message field and click the **SEND** button or press **Enter** to send

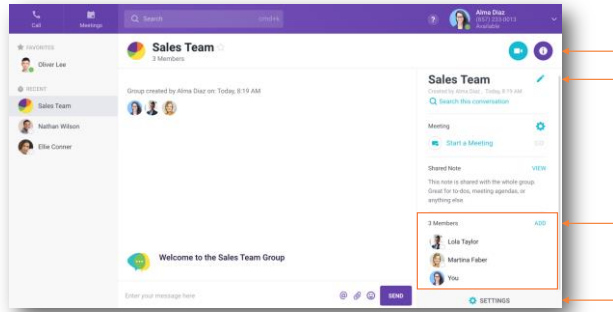
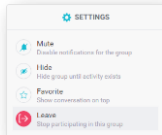


A received group chat looks similar to a one-to-one chat and will show the participants in the group chat. The group name will be used to identify the group. Click the ellipsis next to a group chat on the **RECENT** panel to favorite, hide, mute, or video call.

Viewing Group Details

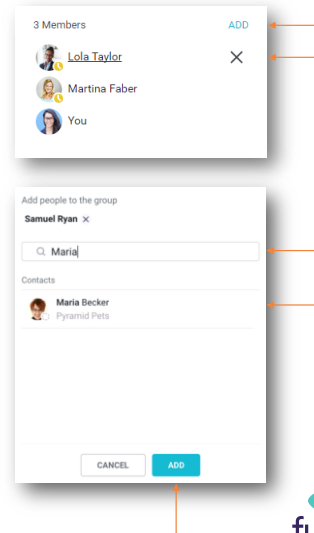
Clicking on the  icon will open the **Group details** panel. From this panel, it is possible to:

- Edit the group name
- View the group members list
- Add/remove people from the group members list
- Click **SETTINGS** to **Mute**, **Hide**, **Favorite**, or **Leave** the group



Adding Members to a Group

- Click the **ADD** button in the **Group details** panel
- Enter the contact's name or email
- Select the contact to be added
- Repeat the search option for each additional contact that needs to be added
- Click on the **ADD** icon when all new members have been selected
- Remove names from the list by clicking on the **X** button



If adding an external contact by email, the application will suggest sending an invite to the contact to join Fuze. Members can be removed from the list at any time by clicking on the X to the right of user's name. When members are added to or removed from the group list, a message will be shown within the chat stating that a change has been made to the group membership. The person making the change and the time at which the change was made will be included.

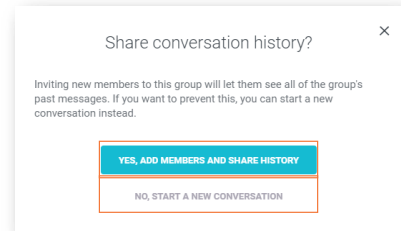
Configuring Group Chat History

When new members are added to a group, two options are available:

- Add a new member to the existing group (new group member will be able to see existing history)
- Create a second group which contains the new member and all previous members (no conversation history exists)



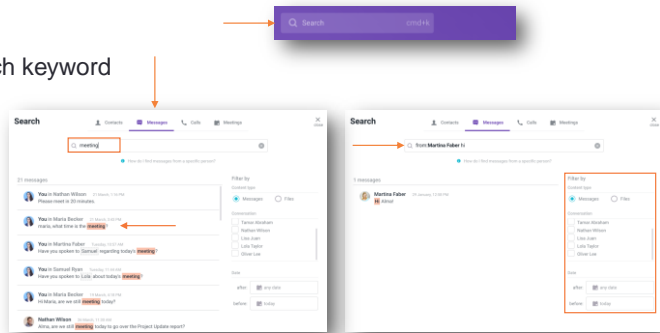
To delete a group, remove all the members and then leave the group.



Searching Chat

Any instant message or file that has been sent or received can be searched.

- Click the **Search** button
- Click **Messages** and enter search keyword
 - The results will be highlighted
- Type **from:**, select contact, and then type the keyword to search messages from that contact
- Results can be filtered by **Content type, Conversation** or **Date**



Click any chat/file in the results to show a preview panel with the ability to **GO TO THIS CONVERSATION**. The **Conversation** filter provides the ability to select a chat group or contact and limit results shown to only those messages with that contact or in that specific group.

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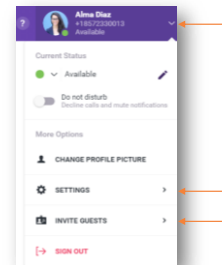
Inviting Guests to Fuze

Inviting a guest provides the ability to communicate with an external contact through chat and meetings within the Fuze Desktop application. To invite a guest:

- Click the profile dropdown menu
- Click **INVITE GUESTS** or **SETTINGS** and then select **Guests**
- Click the **INVITE A GUEST TO FUZE** button
- Fill in all applicable fields and then click the **SEND INVITATION** button
 - An email will be sent to the guest



It is also possible to invite guests from a group chat.



Invite guests to work with you in Fuze
Guests can chat, share files, join meetings, and work with anyone in groups you add them to. [Learn more.](#)

First name* Last name* Email address*

Adam Berlitz aberlitz@qyz.org

Do you want to add this guest to any group conversations?

Invitation message
Personalize the sample message by adding their name, your name, company, etc.

Welcome!
We use Fuze for our communication and we'd like to invite you to join as a guest. You'll be able to chat, share files, and join meetings with people and groups you're added to. Let me know if you have any questions.

Thanks, and again, welcome!

SEND INVITATION

Guests will appear at the top of a user's **Recent List**, once the invitation has been accepted.

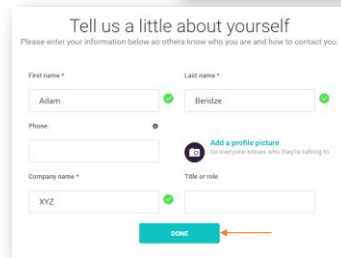
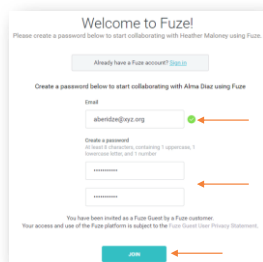
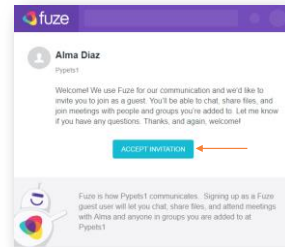
Guests will have the following capabilities in Fuze:

- Chat one-on-one and in groups by invitation
- Visibility to see all members in a group
- Create one-on-one chats and additional groups with other group members
- Join Fuze Meetings

Accepting a Fuze Guest Invitation

To accept an invite as a Fuze guest:

- Click **ACCEPT INVITATION**
- Enter **Email**, create a **Password**, then click **JOIN**
- Create a profile by filling in all applicable fields and then click **DONE**

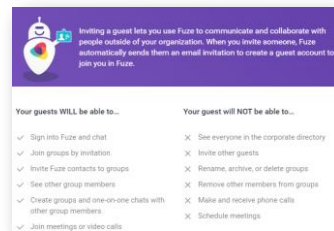
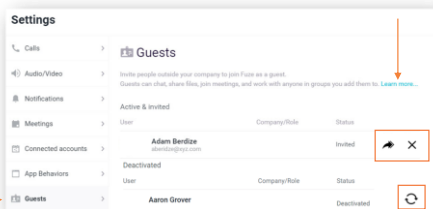
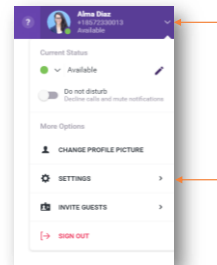


The **Fuze Guest User Privacy Statement** is available to view on the Fuze guest sign in page. Profile information includes **First name**, **Last name**, **Phone** number (optional), **Profile picture** (optional), **Company Name**, and **Title or role** (optional). If a guest has already been invited and is utilizing Fuze, an error will appear indicating the invite has already been used and will allow the guest to sign in under the already existing profile. If the guest is already a Fuze user (the guest's company also uses Fuze), the invite will prompt the guest to sign in rather than create a profile.

Managing Guests

To view the status or deactivate a guest:

- Click the profile dropdown menu
- Click **SETTINGS** and then select **Guests**
- Click ↶ to resend an invite or ✕ to deactivate a guest
- Click ↻ to activate a deactivated guest
- Click **Learn more...** to view a complete list of guest capabilities



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Status will show either **Invited**, **Active**, **Expired**, or **Deactivated**. The Fuze user that invited the guest or a Fuze administrator can deactivate a guest within the Fuze Hub. Once deactivated, a guest will no longer be able to utilize Fuze. A deactivated guest, may be re-activated at any time and the invite email will be re-sent.

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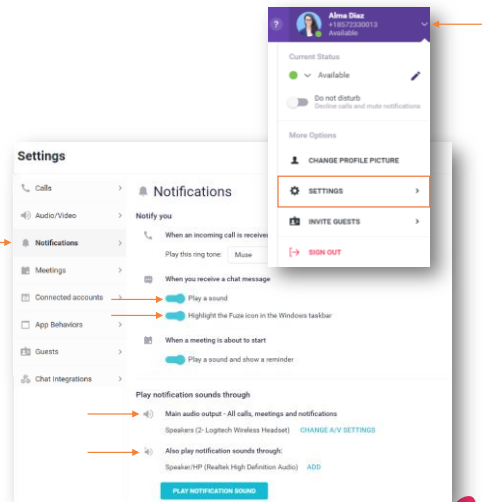
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Configuring Chat Notification Sounds

- Click the profile dropdown menu
- Select **SETTINGS**
- Select **Notifications**
- Click the **Play a sound** toggle to hear an audio alert when a chat message is received
- Click the toggle to **Highlight the Fuze icon in the Windows taskbar** when a chat message is received




Users can change **Main audio output** and additional notification output by clicking the corresponding buttons.




The Fuze icon will not highlight (Windows) or bounce (Mac) when there are unread messages while in **Do not disturb** mode.

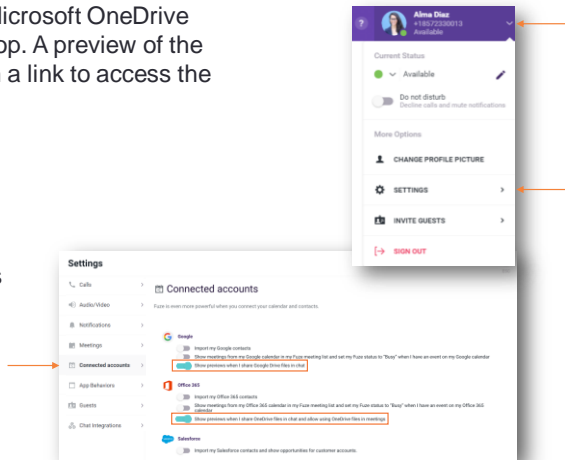
Connecting Accounts

A user can connect to a Google Drive or Microsoft OneDrive account and share files within Fuze Desktop. A preview of the file will appear in the chat panel along with a link to access the file in the Google Drive or OneDrive.

- Click the profile dropdown menu
- Select **SETTINGS** and then click **Connected accounts**
- Click the  toggle to show previews of the Google Drive or OneDrive files in chat



Click the attachment  icon in a message to send a file from a connected account.



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Chat Knowledge Check

1. A file of up to 100 MB in size can be sent using Fuze Chat. True or False? **True**
2. Manually setting presence will override all other presence options. True or False? **True**
3. The Fuze icon will not flash (Windows) or bounce (Mac) when there are unread messages while in Do not disturb mode. True or False? **True**
4. Which color shows a status of “Out of office?” **Green / Red / Orange / Gray**
5. Which icon is used to mention someone in an instant message? **@**
6. A group name is required for group chats with 10 or more people. True or False? **False**
7. A Fuze guest can only be invited from the Invite Guests Setting. True or False? **False**
8. Which icon is used to deactivate a Fuze guest? **×**



Thank You!