About Trio User

Trio User is a web based application that you, among other things, can use to search the company directory, refer your phone, and listen to your voicemails. Trio User is automatically adjusted after the size of your screen so that it is always displayed in the best way. This means that the usage and the appearance differs depending on which type of device you uses: a computer, a tablet, or a smartphone. Any information in this quick reference guide that is specific for a tablet or a smartphone is marked with *blue italic text*. If not otherwise specified, the images in this quick reference guide is from a computer.

In several situations in Trio User, information or settings are displayed in a popup window. To cancel and return to the main window, click or tap in the main window, outside the popup window. *On a smartphone, the popup covers the entire screen. In this case, tap the ✕ in the top left corner to cancel.*

Starting Trio User

Trio User is started using your web browser. The address should be provided by your system administrator.

Address: _____

If you are already logged in to Trio Enterprise, or if the system has automatic login, Trio User will be opened without you having to enter any data.

If not, either enter your user name and password or select an external login method.

Tip: When logged in, you can add a shortcut to Trio User on your desktop or your home screen. This is done from the menu in your web browser. The shortcut will lead to the page in Trio User that was displayed when the shortcut was created.
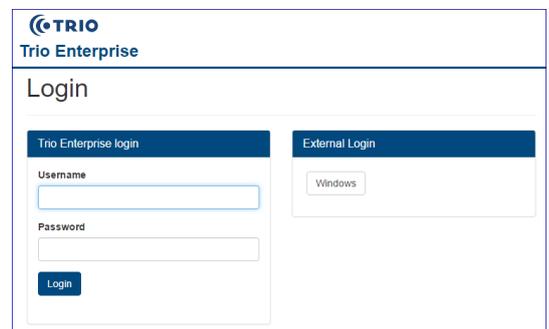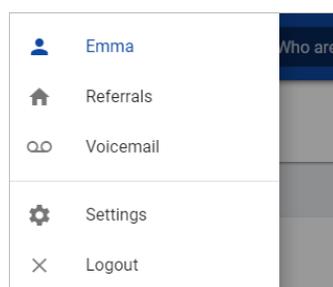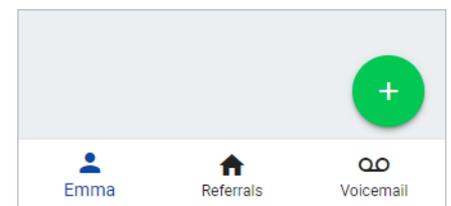
The Menu

There is a menu for navigation in Trio User. On a computer, the menu is displayed to the left of the screen. On a tablet, the menu is displayed when you tap ☰ at the upper left corner. On a smartphone, the menu is displayed at the bottom of the screen.
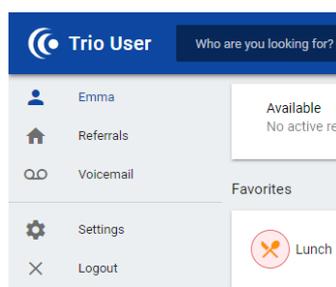
The menu on a computer.

The menu on a tablet.

The menu on a smart phone.

From the menu, you reach the different pages of Trio User:

Home page – A page with your name that is shown when you log in. Here, you can see and manage your current referral, create new referrals from favorites, and manage your favorites.

Referrals – Manage your current and upcoming referrals and create new referrals.

Voicemail – Manage and listen to your voicemail messages.

Settings – Choose language, change your Trio password, and select default settings for your referrals and your voicemail. *On a smartphone, the settings are found under ⚙ in the top right corner.*

Logout – Log out from Trio Enterprise. If you want to exit Trio User, but not log out from Trio Enterprise, just close your web browser. You will then be able to start Trio User or other Trio Enterprise applications without having to login again, unless your web browser is configured to remove cookies when it is closed. *On a smart phone, **Logout** is found under **Settings**.*
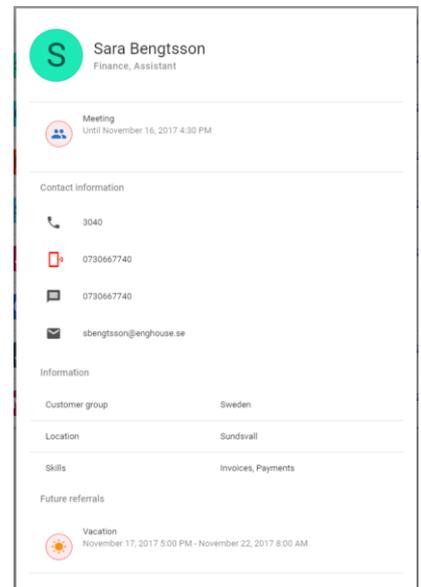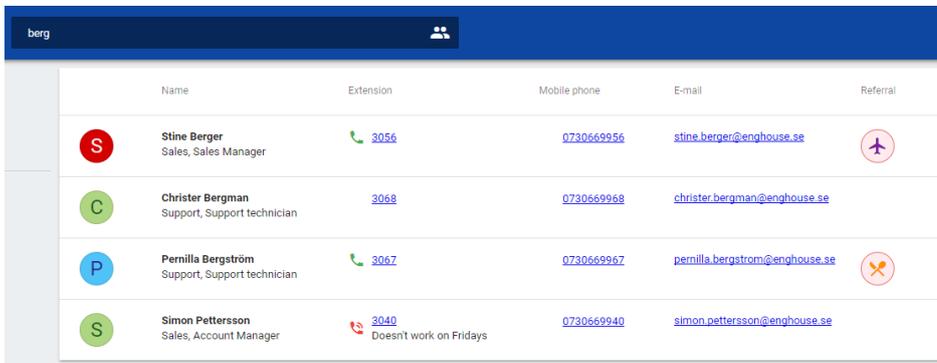
Searching

The field for searching the company directory is always displayed at the top of the screen, regardless of which page that is displayed. *On a smartphone, tap* 🔍 *to display the search field.*

((• Trio User	Who are you looking for? (e.g. name, department, title)	👥
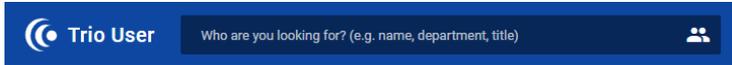
Enter what you want to search for in the search field. Trio User searches automatically while you are typing. In which fields the search is done depends on the system settings, but most commonly, it is done in all available fields, for example first name, last name, mobile number, department, and title. The search is done from the beginning of each field. If you are unsure about the spelling or the beginning of a word, enter ***** (unknown number of characters) or **?** (one character) in front of, or in the middle of your search term.

The Search Result

The search result is primarily sorted by last name, then by first name, department and title. A maximum of 50 hits are displayed, if there are more, the first 50 hits are displayed. Which data that is displayed for a person in the search result depends on the size of your screen. Press on a row to display all data for that person.

berg				👥
	Name	Extension	Mobile phone	E-mail	Referral
S	**Stine Berger** Sales, Sales Manager	📞 3056	0730669956	stine.berger@enghouse.se	✈
C	**Christer Bergman** Support, Support technician	3068	0730669968	christer.bergman@enghouse.se	
P	**Pernilla Bergström** Support, Support technician	📞 3067	0730669967	pernilla.bergstrom@enghouse.se	✕
S	**Simon Pettersson** Sales, Account Manager	📞 3040 Doesn't work on Fridays	0730669940	simon.pettersson@enghouse.se	

From the search result or from the detailed information, you can email the person, or call the person's extension or mobile phone. If a person has a presence symbol, and depending on the system settings, you can press the person's photo or icon to start a chat.

From the detailed information, you can also send SMS to the person by tapping the mobile number marked with the 💬 symbol. The call or the message opens in the default program for the selected message type on your device. If you, for example, do not have a program for phone calls on your computer, you will not be able to call from Trio User.

S Sara Bengtsson
Finance, Assistant

👥 Meeting
Until November 16, 2017 4:30 PM

Contact information

📞 3040

📱 0730667740

💬 0730667740

✉ sbengtsson@enghouse.se

Information

Customer group	Sweden
Location	Sundsvall
Skills	Invoices, Payments

Future referrals

☀ Vacation
November 17, 2017 5:00 PM - November 22, 2017 8:00 AM

Which data that is displayed depends on the system settings.

Status Symbols

Various symbols are displayed depending on the person's current status for referral, presence and line state. If no symbol is displayed, the status is unknown to the system.

Referral Reasons

✕	Lunch	☀	Vacation
🏠	Gone for the day	📅	On leave
🚗	Out on business	⏱	Temporarily out
👥	Meeting	✚	Sick leave
✈	Business trip	📦	Other
🥧	Part-time	↪	Forwarded, Forwarded, mobile

👥 A pink background means that the phone is closed.

👥 A white background means that the phone is open.

Presence

⭕	Offline
✅	Available
🕐	Be right back, Away, Off work
🔴	Busy, In a call, Busy on mobile, In a conference call
⛔	Do not disturb Presenting

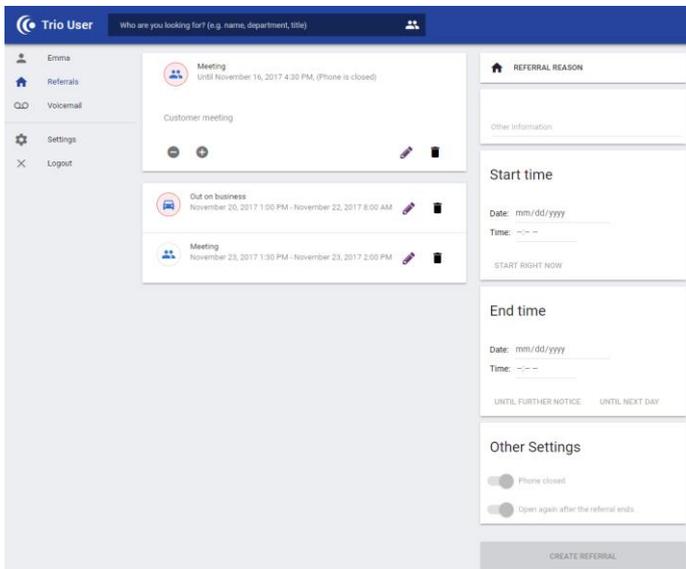*Presence is displayed together with the person's photo or icon.*

Line State

📞	Free
📞	Busy
📞	Disconnected

Mobile Line State

📱	Free
📱	Busy
✕	Disconnected

Referrals

On the **Referrals** page, your current referral is displayed at the top, and below that, your upcoming referrals for 10 days ahead are displayed. The fields for creating a new referral are displayed to the right. *On a smartphone, the fields for creating a new referral are displayed below your current referral and your upcoming referrals are displayed at the bottom of the page.*

Tip: If you have created favorites, you can easily create a new referral by pressing the desired favorite on the home page. A referral is then created with the preset settings for that favorite. See *Favorites* for more information about how to handle favorites.

Creating a New Referral

Select referral reason and enter settings for your referral. Press **Create referral** at the bottom when done. Available settings are:

- **Referral reason** – Press **Referral reason** and select a reason in the list. The default settings for the selected reason are shown automatically in the other fields.
- **Other information** – Information about your referral, which will be visible for your colleagues.
- **Start time** – When the referral will start. Select date and time, or **Start right now**. The selected start time is displayed below the field title.
- **End time** – When the referral will end. Select date and time, **Until further notice**, or **Until next day**. The selected end time is displayed below the field title.
- **Other settings** – Select whether the phone should be open or closed during the referral. If you choose that the phone should be closed, you can also select where your calls will be forwarded: directly to voicemail, to your mobile or to any other number that you enter. If you do not choose any of these alternatives, your calls will be handled according to the system settings. In addition, you can choose whether the phone will be opened again when the referral ends.

Note: The appearance of the fields for selecting time and date vary depending on which web browser and device you use.

Editing a Referral

The settings for both current and upcoming referrals can be edited by pressing ✏ for the referral you want to edit. The settings for that referral are then shown in the fields to the right / below. Edit the settings and press **Update**. *On a smartphone or a tablet, swipe to the right to find the **Edit** option for your upcoming referrals.*

If you want to edit the duration of a current referral, press ➖ or ➕ to shorten or prolong the referral with 15 minutes.

Deleting a Referral

Press 🗑 for a referral to delete it. Confirm by pressing **Delete** on the follow-up question. *On a smartphone or a tablet, swipe to the left to find the **Delete** option for your upcoming referrals.*

Voicemail

On the **Voicemail** page, you can listen to and handle your voicemail messages. The messages are displayed on three different tabs:
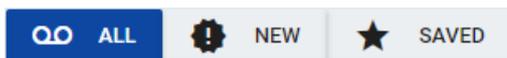
❗ is shown in front of all new messages that you have not listened to yet.

⭐ is shown in front of messages that you have saved.

The following options are available for handling of a voicemail message:

On a smartphone or a tablet, swipe to the left to find the options below.	*On a smartphone or a tablet, swipe to the right to find the options below.*
▶ **Play** – Listen to the message in your web browser.	📞 **Call** – Call the person who left the message. This requires that you use a smartphone, or that your device has another program to call from.
⬇ **Download** – Download the message as an mp3 file.	
⭐ **Save** – Save the message in your voicemail for an unlimited period.	💬 **SMS** – Text the person who left the message. This requires that you use a smartphone, or that your device has another program to send text messages.
🗑 **Delete** – Delete the message from your voicemail. Confirm by pressing **Delete** on the follow-up question.	

Favorites

A favorite is saved settings for a certain type of referral. For example, you can create a favorite for *Lunch* with predefined settings for duration and where your calls will end up while you are at lunch.

Activating Referral Using a Favorite

To activate a referral using a favorite, simply press the favorite on the home page. A confirmation message appears at the bottom of the screen so that you know that the referral has been created.

Creating a Favorite

To create a new favorite, press at the bottom right corner of the home page. A popup with settings for the new favorite appears. Choose settings and press **Create favorite** at the bottom when done. The settings for a favorite are similar to the settings for a referral, but with the following differences:

- **Name** –The favorite must be given a name.
- **Start time** – Select:
  - o **Start right now** if you want the referral to start directly when you press the favorite.
  - o A specific time if you want the referral to be created when you press the favorite, but not to be activated until the specified time.
- **End time** – Select:
  - o **Duration** to enter for how long, in hours and minutes, the referral will be active.
  - o **Until further notice** if you want the referral to be active until you remove it.
  - o **Until next day** if you want the referral to be active until a specified time the day after the activation.
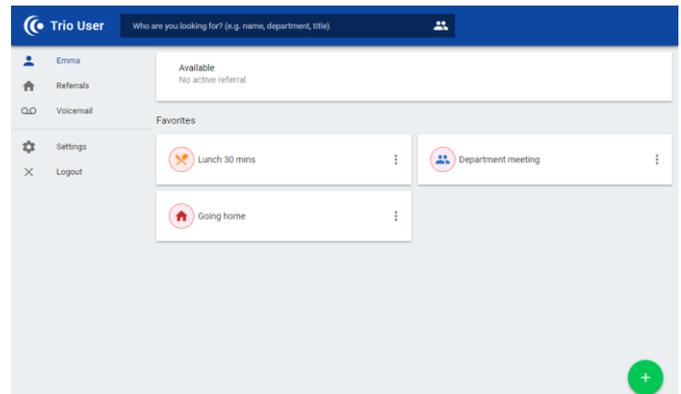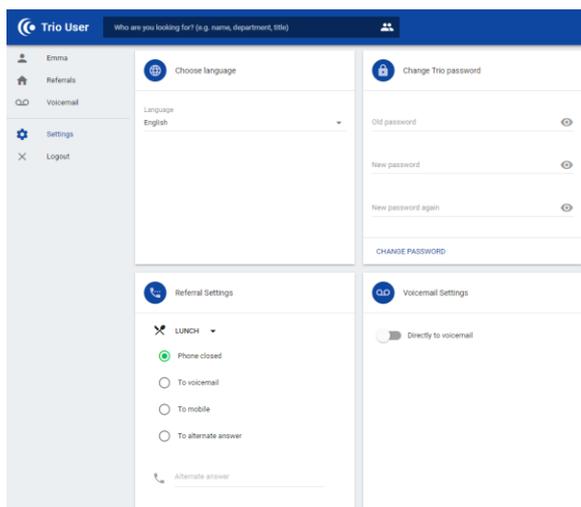

Editing a Favorite

To edit a favorite, press for the favorite and select **Edit**. A popup with the settings for that favorite appears. Edit the settings and press **Update favorite.**

Deleting a Favorite

To delete a favorite, press for the favorite and select **Delete**. Confirm by pressing **Delete** on the follow-up question.

Settings

Choose Language

Choose the language in which you want Trio User to be displayed. Available languages are Swedish, English, Danish, Norwegian and Finnish.

Change Trio Password

Change your password for Trio. Enter your current password in the first box and then enter your new password in the following two boxes. Press at the end of the row if you want to see the characters you enter.

Note: If you use an external login for Trio User, that password cannot be changed from here.

Referral Settings

Choose default settings for how your calls shall be handled for each referral reason. See *Referrals* for information about the different options. The settings that you choose here will be selected automatically when you create a new referral.

Voicemail Settings

If you activate **Directly to voicemail**, your calls will be directly connected to your voicemail, which means that the preceding referral information will not be read for the customer when you have a referral with the option *Phone closed*. If you have a referral with other settings, e.g. to mobile, these settings will be applied instead.

If any setting or function described in this quick reference guide is not visible, it is either because you does not have that function (e.g. voicemail), or that the function is not activated in the system.