Ultimate Lync Setup & Login Checklist

This practical guide is designed for professionals who need to ensure a secure and stable connection to Microsoft Lync or Skype for Business. Use this list before you launch the application to prevent common login errors and audio issues during critical meetings.

Phase 1: Pre-Login Preparation

- **Verify your network connection.** Ensure the device is connected to the corporate LAN or a stable VPN if working remotely without Edge Servers.
- **Identify the correct client version.** Confirm whether the organization requires Lync 2013, Skype for Business Basic, or the full Office Professional Plus client.
- **Locate the official installer.** Download the software only from the company intranet or the official Microsoft Download Center to avoid malware.
- **Check system time settings.** Ensure the computer clock is synchronized with the server time to prevent authentication failures due to time skew.
- **Install root certificates.** Make sure the device has the necessary trusted root certificates if connecting from a non-corporate personal device.

Phase 2: The Login Process

- **Distinguish your ID.** Confirm the difference between the "Sign-in Address" (usually SIP URI) and "User Name" (`DOMAIN\User`).
- **Clear previous credentials.** Delete any saved passwords from the login screen if this is a shared computer or a fresh install.
- **Enter manual servers if needed.** Input the specific Internal and External server names in "Advanced Connection Settings" if automatic discovery fails.
- **Monitor the login status.** Watch for specific error codes during the sign-in spin to identify if the issue is DNS or password-related.
- **Test presence visibility.** Verify that the status icon turns green (Available) immediately after logging in.

Phase 3: Audio & Video Optimization

- **Select the primary device.** Go to Audio Device Settings and explicitly set the headset as the "Default Communication Device."
- **Adjust video framing.** Use the Video Settings preview to enable "Crop and Center" and check the background visibility.
- **Set privacy boundaries.** Update the "Status" options to increase the idle time before appearing "Away" to 15 minutes.
- **Disable disruptive alerts.** Turn off "Display alerts in full screen" to protect presentations from incoming chat pop-ups.

Phase 4: Troubleshooting & Maintenance

- **Flush the cache.** Delete the specific user folder in `%AppData%` if the client enters a login loop.
- **Archive conversations.** Enable Outlook integration to ensure all instant messages are saved in the "Conversation History" folder.
- **Update the client.** Check for specific patches or Service Packs recommended by the IT department for connection stability.
- **Log out securely.** Always use the "Sign Out" function rather than just closing the window when finishing work on external devices.