

## PLACING A CALL

### From Quick Dialer Search Bar

Type the contact details in the Quick Dialer search bar and do one of the following:

- Double-click the contact.
- Select the contact and click.

### From Recent

Click the **Recent** tab on the dashboard and do one of the following:

- Double-click the contact.
- Select the contact and click.

## ANSWERING A CALL

- Click in the notification area.
- Click to end an active call.

## MAKING A VIDEO CALL

1. Set the primary extension to your softphone.
2. Type the contact's details in the Quick Dialer search bar, and then select a contact.
3. Click to place a voice call.
4. Click to broadcast the video.

## ACCESSING VOICEMAIL

1. On the dashboard, click the **Voicemails** tab.
2. Select the voicemail you want to listen to.
3. Use one of the following options to play your voicemail:
  - Click to play the voicemail on your phone.
  - Click to play the voicemail on your computer speakers.
4. Click to start the voicemail playback.

## UPDATING AVAILABILITY STATE



1. Click your current Availability State on the dashboard.
2. Select the Availability State you want to use.
3. Choose **Custom** to specify your own label and color for your Availability State. Configured call routing rules apply.

# SHORETEL CONNECT CLIENT QUICK REFERENCE GUIDE

## SETTING UP A CONFERENCE


1. Click the **Events** tab on the dashboard.
2. At the bottom of the second pane, click **+New Event**.
3. On the third pane, fill in the required fields.
4. Click **Create Event Invite** to generate the invitation.

## SHARE YOUR SCREEN



1. Click the **People** tab, and then select a contact.
2. In the third pane, click .
3. Click **Share Full Screen, Share Area, or Share Window**.
4. Click  to start sharing.

## TRANSFERRING A CALL



### Blind Transfer

1. View the incoming call in the notification area.
2. Click  and type the contact's name or phone number.
3. Click **Transfer**.




### Consultative Transfer

1. View the incoming call in the notification area.
2. Click  and type the contact's name or phone number.
3. Click  and type the contact's name or phone number.
4. Click **Consult**.

## Transferring to Voicemail

1. View the incoming call in the notification area.
2. Click  and type the contact's name or phone number.
3. Click  and type the contact's name or phone number.
4. Click **Voicemail**.

## Parking a Call

1. View the incoming call in the notification area.
2. Click  and type the contact's name or phone number.
3. Click  and type the contact's name or phone number.
4. Click **Park**.
5. Click .

## SENDING AN IM


### To an Individual

1. Type the contact details in the Quick Dialer search bar, and then select a contact.
2. Type a message in the text box, and then and press Enter.

### To a Group

1. Click **People > Groups**, and then select a group.
2. Select **Start Group Chat**.




### To Multiple Users

1. Initiate an individual chat.
2. Click  and type the contact's name or phone number.
3. Click **Add Contact to Conversation**.





## JOINING A CONFERENCE

### From the Notification Area


Click  or  for an upcoming conference and do one of the following:

- Click **Call Me**, and then click  to enter your phone number.
- Click  in the second pane, and then click  to enter the participant code.

### From the Events Tab

1. To view pending conferences, click **Events > Upcoming**.
2. Select the conference you want to join, and then click .
3. Do one of the following:
  - Click **Call Me**, and then click  to enter your phone number.
  - Click  in the second pane, and then click  to enter the participant code.
  - Click **Call via Computer Audio** to use softphone.

### From Microsoft Outlook Calendar

1. Open the appointment, and then click the **Click here to Join** link.
2. Enter your name, and then do one of the following:
  - Click **Call Me** and enter your number to configure call back.
  - Click  in the second pane.
  - Click **Call via Computer Audio** to use softphone.

## EXTENSION ASSIGNMENT

In addition to using the Assign soft key on a phone to assign an extension to a phone, you can assign your extension to the softphone or an external phone.

### Softphone Assignment

1. On the dashboard, click the **<username>** tab.
2. In the **Primary Assignment** tab, select **Softphone**.
3. Select either the default or **Microphone** in the drop-down list.
4. Verify the softphone status.
5. In the **Settings > Softphone** page, select **On startup assign me to my softphone**.

### External Phone Assignment

1. On the dashboard, click the **<username>** tab.
2. In the **Primary Assignment** tab, click the **Select Number** drop-down list.
3. In the **Number**, enter the associated phone number.
4. To save the number, click **Use Selected Number**.

## QUESTIONS?

Download the **Connect Client User Guide** for more information.