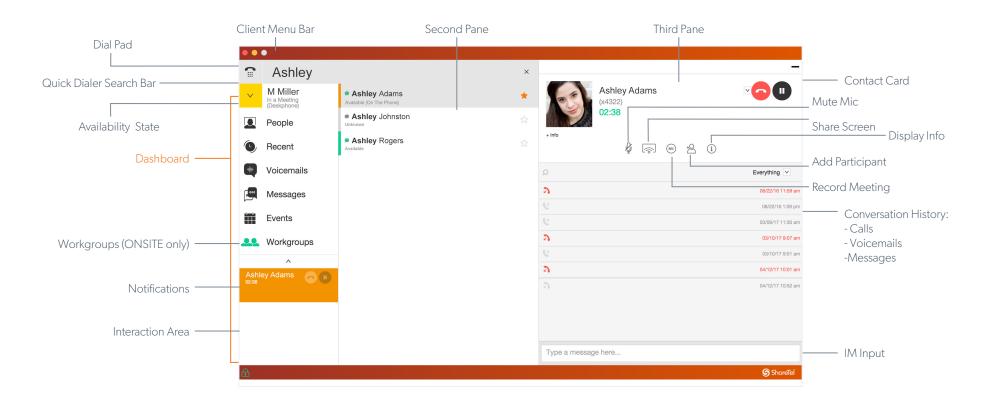
SHORETEL CONNECT CLIENT QUICK REFERENCE GUIDE





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 10 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.
- 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.
- 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 P.

SENDING AN IM

To an Individual

- 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 **n** 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 in to enter the participant code.
 - Click Call via Computer Audio to use softphone.

From Microsoft Outlook Calendar

- 1. Open the appoinment, and then click the **Click here to loin** 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**.
- 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.

© 2017 ShoreTel Inc. All rights reserved.