ShoreTel Connect Client Quick Reference
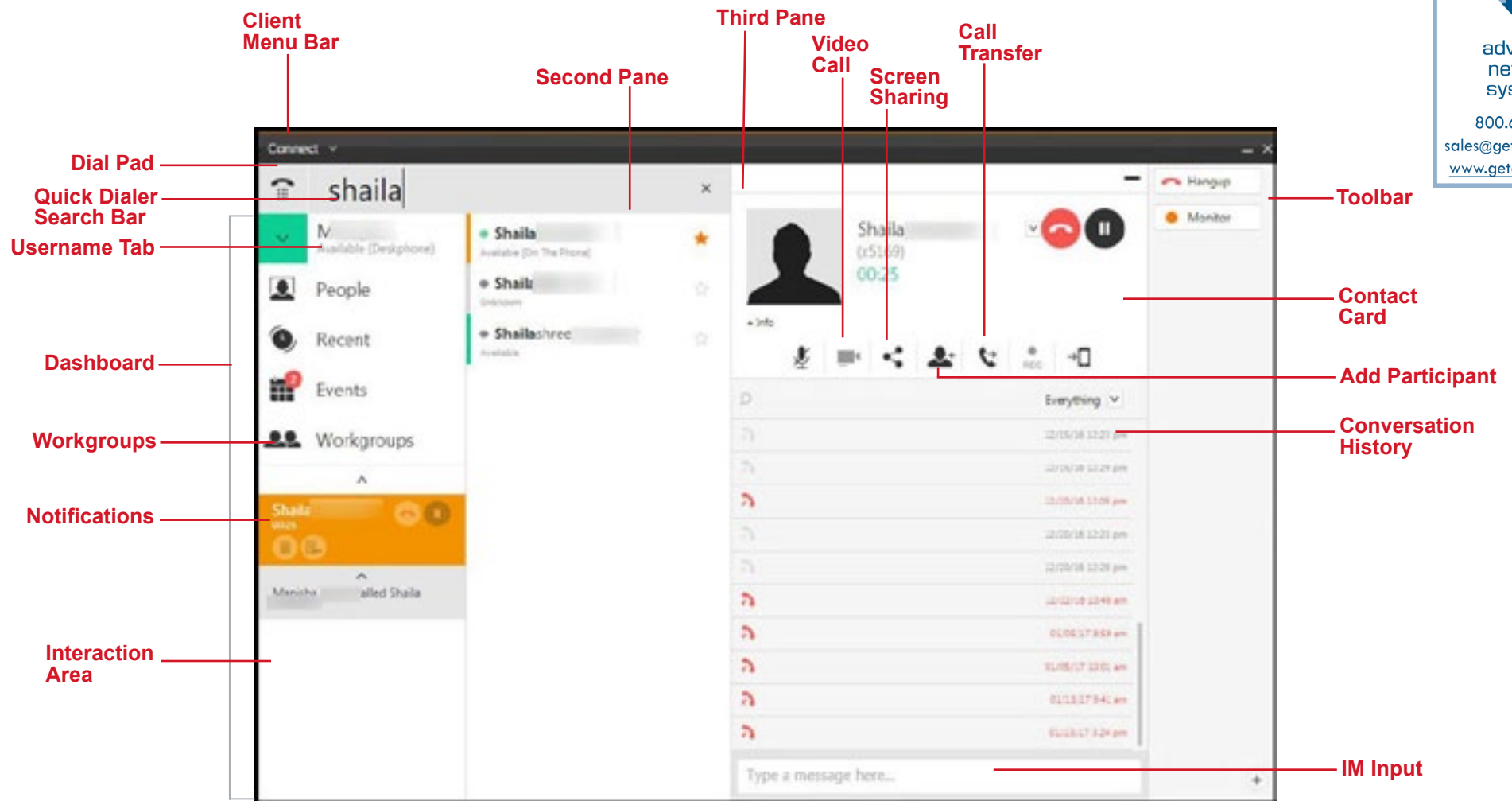
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PLACING A CALL

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 Dial Pad

1. Click 🎛 on the dashboard.
2. Enter the extension or phone number, and press **Enter**.

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.

SETTING UP A CONFERENCE

To create a new conference:

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

SHARING YOUR SCREEN

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

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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**.

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 .

Using the Intercom Option

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 **Intercom**.

Using the Whisper Option

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 **Whisper**.

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**.

SENDING AN IM

To an Individual

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

To a Group

1. Click **People > Groups**, and 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 enter a number to configure call back.
- Click in the second pane.

From the Events Tab

1. To view pending conferences, click **Events > Upcoming**.
2. Select the conference you want to join and click .
3. 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.

From Microsoft Outlook Calendar

1. Open the appoinment and click the **Click here to Join** link.
2. Enter your name and 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.

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 select a contact.
3. Click to place a voice call.
4. Click to broadcast the video.

WORKGROUPS

Available only for Connect ONSITE

Viewing Workgroup Information
Click **Workgroups** on the dashboard to view the following information:

- Workgroup name
- Queued calls
- Longest queued call
- Longest call

Viewing Agent Information
You can view the number of workgroup agents logged in and change an agent's state. The workgroup states are Logged in, Logged out, and Wrap up.

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.

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** field, enter the associated phone number.
4. To save the number, click **Use Selected Number**.

Note: For more details about using the Connect client, see the *ShoreTel Connect Client User Guide*.

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