



PLACE 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

ANSWER A CALL

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

MAKE 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.

ACCESS 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.

UPDATE 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.

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SET UP A CONFERENCE

1. Click the Events tab on the dashboard.
2. On the second pane, click .
3. On the third pane, fill in the required fields.
4. Click Create to generate the invitation.

SHARE YOUR SCREEN

1. Click the Contacts tab on the dashboard, and select a contact.
2. In the third pane, click .
3. Click Share Full Screen, Share Area, or Share Window.

The screen is shared when the contact accepts the invitation.

TRANSFER A CALL

Blind Transfer

1. View the incoming call in the notification area of the dashboard.
2. Click  and type the contact's name or extension.
3. Click Transfer.

Consultative Transfer

1. View the incoming call in the notification area.
2. Click  and type the contact's name or extension.
3. Click Consult.
4. In the Consulting window, click  to complete the call transfer.

Transferring to Voicemail

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

Parking a Call

1. After answering a call, click .
2. In the second pane search field, type the contact's name or extension, and select the contact.
3. Click Park, and click .

SEND AN IM

To an Individual

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

To a Group

1. Click Contacts > Groups.
2. For the group you want to send a message to, click .
3. Click Start Group Chat.
4. Type a message in the text box, and then press Enter.

To Multiple Users

1. Initiate an individual chat.
2. Click  and type each contact's name or phone number.
3. Click Create New Conversation.
4. Type a message in the text box, and then press Enter.

JOIN A CONFERENCE

From the Dashboard Area

- To dial into a conference, click .
- To join the screen share, click .

From the Events Tab

1. To view pending conferences, click Events > Upcoming.
2. Select the conference you want to join, and then do one of the following:
 - To dial into the conference using your desk phone, click  on the third pane.
 - To have the conference call you at a number you specify, click the drop-down arrow on  on the third pane; enter the phone number and click Call Me.
 - To join the screen share, click .

From Microsoft Outlook Calendar

1. Open the appointment in your calendar.
2. Do one of the following:
 - Click Click here to join.
 - Open the URL from the invitation in a web browser.
3. In the Introduce yourself as field, enter your name and press Enter.
4. Join the audio using one of these methods:
 - To use softphone, click Call via Computer Audio.
 - To have the conference call you, enter a number and click Call Me.

ASSIGN YOUR EXTENSION

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 section, select External Assignment Number.
3. Do one of the following:
 - Select an already configured number.
 - Click Add New Number, enter a label and a number, and click Add.

QUESTIONS?

Download the [Connect Client User Guide](#) for more information.