ShoreTel Connect Client Quick Reference Guide

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This document helps you get started with using the ShoreTel Connect client for the first time.

You can sign into the Connect client by using your Windows credentials, or by using your ShoreTel User credentials (if you are using OS X), as explained in the following sections.

Signing in With ShoreTel User Credentials

1. Launch the ShoreTel Connect client.

    The ShoreTel login screen is displayed.

    The login screen contains the following fields:

    - Email
    - Password

2. Type your email address in the **Email** field.

3. Type your password in the **Password** field.

    You can select the **Save Password** option if you want the client to remember your credentials on your next login.

4. Click **Log In**.

    The ShoreTel Connect client is launched with your ShoreTel user credentials.

Placing a Call

This section describes the procedures for placing a call by using the ShoreTel Connect client.

Placing a Call From the Search Bar

1. Sign into the ShoreTel Connect client.

2. Type the number you want to dial.

   The rectangular area next to the dial pad and below the menu bar is the search bar. You can use this area to enter the name of a contact, number, or an email address.

3. Press **Enter**.

   The call is placed to the entered number.

Alternately:

1. Sign into the ShoreTel Connect client.

2. Type the first few letters of the name of the contact you want to call.

   The contact is displayed on the second pane.

3. Double-click the contact.

   The call is placed and appears on the dashboard under the **Calls** section.

   Alternately, you can click the contact on the second pane, and click the green call icon on the third pane to place the call.

   If you want to view all known information of a contact including number and email, click the contact on the second pane, and click **+Info** on the third pane.

Placing a Call Through the Contact List

1. Sign into the ShoreTel Connect client.

2. Click the **People** tab on the dashboard.

   The directory is displayed on the second pane.

3. Scroll down the second pane to find the contact you want to call.

4. Double-click the contact.

   The call is placed and appears on the dashboard under the **Calls** section.

   Alternately, you can click the contact on the second pane, and click the green call icon on the third pane to place the call.

   If you want to view all known information of a contact including number and email, click the contact on the second pane, and click **+Info** on the third pane.

Sending an Instant Message

1. Sign into the ShoreTel Connect client.

2. Locate the contact you want to message either by using the search bar or by browsing through your contact list.

3. Click the contact on the second pane.

    Information about the contact is displayed on the third pane.

4. Enter your message in the IM input field provided at the bottom of the third pane, and press **Enter**.

    The instant message is sent and the conversation appears on the dashboard under the **Conversations** section.

Playing a Received Voicemail Message

When a voicemail message has been sent to your voicemail inbox, you receive a notification on the ShoreTel Connect client dashboard, and as a system notification on your Windows or Mac computer.

To listen to your voicemail message:

1. Sign into the ShoreTel Connect client.

2. Click the **New Voicemail** notification on the dashboard.

    The voicemail message clip is displayed on the second pane.

3. Click the play icon.

    The voicemail message is played and the notification is cleared from the dashboard. Alternately, you can choose to reply, forward, or delete the message by clicking the respective option.

    If you happen to close the voicemail notification accidentally, you can retrieve the same by clicking the **Recent** tab, and filtering for voicemails on the **All** tab.

Creating an Event

To create an event, such as a new meeting:

1. Sign into the ShoreTel Connect client.

2. Click the **Events** tab on the dashboard.

    The Events screen is displayed on the second pane.

3. At the bottom of the Events screen, click +**New Event**.

The Event Creation screen is displayed on the third pane.

4. Enter the details about the event you want to create.

5. Click **Create Event Invite**.

The ShoreTel Connect client opens an event invitation on the third pane. If you have integrated the Connect client with Microsoft Exchange, a meeting invite is launched in Office Outlook. The event invite must be emailed to the participants. The event is added to your Office Outlook calendar (if integration is complete). If you want to add the event to your personal calendar, then you can download the iCalendar file as described in the *ShoreTel Connect Client User Guide*.