


MITEL USER GUIDE – CONNECT CLIENT

Signing In


- Double-click the Connect Client icon
- Enter your User ID
- Enter Password
- Select Remember this and log me in automatically next time
- In the Server field
- Click Log in

Making a Call


From the Search Bar

- Type a contact's name, number, or email address in (next to dial pad)
- Double-click the contact, click on the extension, or click the contact then click 

From the Dial Pad

- Click 
- Dial the extension or number
- Press enter

From Favorites



- Click the Contacts tab
- Scroll down to find the contact
- Double-click the contact, click on the extension or click the contact and the click 

From Recent



- Click the Recent tab
- Scroll down to find the contact
- Double-click the contact, click the number or single click then click





Answering a Call

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

Accessing Voicemail Messages

- Click the Voicemail tab
- Select the Voice Message you would like to hear
- Choose how you want to hear  (phone or computer speakers) and then click 
- You can reply to, forward, or delete the received voicemail

Sharing your Screen

- Click the Contacts tab
- Click the contact on the second pane
- Click 
- Select Share Full Screen, Share Area or Share Window
- Click  to start sharing

Saving a Favorite

To Favorites Tab

- Click the Search Bar
- Type in a Contact
- Click the star next to the contact's name

To Groups Tab


- Launch the Connect Client
- Click the People Tab
- Select New Group
- Name the Group
- Add people to the group
- Click save

Sending an Instant Message


To an Individual

- Find the contact
- Click the contact on the second pane
- Type the message in the text box
- Press Enter

To a Group


- Click the Contacts tab
- Select the Groups tab
- Select a group  and choose Start Group Chat

To Multiple Users

- Initiate an individual chat
- Click 
- Type in a Contact's name or extension
- Click Add Contact to Conversation

Transferring



Blind Transfer

- While on a Call Click 
- Type in the Contact's Name or Extension
- Click Transfer


OR

- Click on the Call the Notification Area and Drag and Drop to a contact


Consult Transfer

- While on a Call Click 
- Type in the Contact's Name or Extension
- Click Consult
- Talk to the 3rd Party and Click  to Complete the transfer



Voicemail Transfer

- While on a Call Click 
- Type in the Contact's Name or Extension
- Click Voicemail

Parking


- While on a Call Click 
- Type in the Contact's Name or Extension
- Click Park

Retrieving a Parked Call




- On your line, click 
- On another extension, single click the contact, then click 

Conferencing

Blind ad-hoc Conference Call

- While on a Call, Click 
 - Type in a contacts name
 - Choose Conference
- OR**
- Click on the Call the Notification Area and Drag and Hover over a contact
 - Select Bind Conference

Consult ad-hoc Conference Call

- While on a Call, Click 
- Type in a contacts name
- Choose Consult
- Talk to ther 3rd party and click  or  to merge the calls

Creating a Conference (Your Bridge)

- Click your name
- Click on "My Conference Bridge"
- Click Copy to Clipboard
- Paste copied information into an email, meeting request, message, etc
- Send invite out (this number never changes and is great for recurring events)

Creating a Conference (Meeting)

- Click the Events tab
- Click +New Event at the bottom of the second pane
- Enter the details of the conference
- Click Create Event Invite to generate the invitation




Creating a Meeting (Outlook)

- Open your Outlook Calendar
- Click New Appointment or New Meeting
- Click Conference
- Select Create (one time bridge number)
- Select the State you would like to show
- Invite people
- Send out


Joining a Conference from Your Bridge

- Click your name
- Click on "My Conference Bridge"
- Click Join My Event Now


Joining a Conference from the Notification Area

- Click  or  in the notification area and do one of the following:
- Click Call me and enter a number to configure a call
- Click  on the second pane

Joining a Conference from Events Tab

- Click the Events tab
- Click the Upcoming tab to view all upcoming conferences
- Select the conference to join
- Click Join Meeting and do one of the following:
 - To take the call through the softphone (your computer and headset), click Call via Computer Audio
 - To configure a call back, click the Call Me option, enter the number, and click Call Me
 - Click  on the second pane. If you have assigned a desk phone or a cell phone to the Connect Client, the assigned phone will ring

Joining a Conference from a Microsoft Outlook Calendar

- Open the Appointment Click the Click here to Join Link
- Enter your Name and do one of the following:
 - To take the call through the softphone (your computer and headset), click Call via Computer Audio
 - To configure a call back, click the Call Me option, enter the number, and click Call Me
 - Click  on the second pane. If you have assigned a desk phone or a cell phone to the Connect Client, the assigned phone will ring

Settings

- Click the Connect Dropdown
- Select Settings
- Go through Call Routing to set up different voice greetings for different availability states and to set up find me or simultaneous ring
- Go to the Voicemail Tab, click on Outlook, Uncheck the box to show voicemails inline in my outlook inbox
- Click Outlook to sync your availability state with your calendar and sync contacts
- Click Notifications, check the box send email notification about incoming voicemail to (enter your email address) and check the box attach voicemail as a wav file

Training Link:

<https://www.loffler.com/resources/product-training>

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