

Crosswind Connect Quick Reference Guide

The User Interface

Active Calls

Manage Voicemails

Contacts

Text Message

Call Logs

Call Recordings

Meetings

Call Reports: must be authorized to use this

Send Broadcast message

Help Website with video tutorials

Settings

Call Forwarding

Call Pairing

System Ring Plan Override: allows managers to change the ring plan for the system.

Dialpad Mode: toggle between desk phone control and your Softphone if your account has one.

Chat State

- Available
- Offline
- Busy

Search: allows you to search through all extensions.

The Dialpad in Desk Phone mode

The Dialpad in Softphone mode

DND: Do Not Disturb

- DND On
- DND Off

Interacting with Extensions

There are two areas where you can interact with extensions, the **All Extensions** and the **Favorites** sections.

For Each Contact:

Under the picture shows the Chat State

White background means Extension is idle



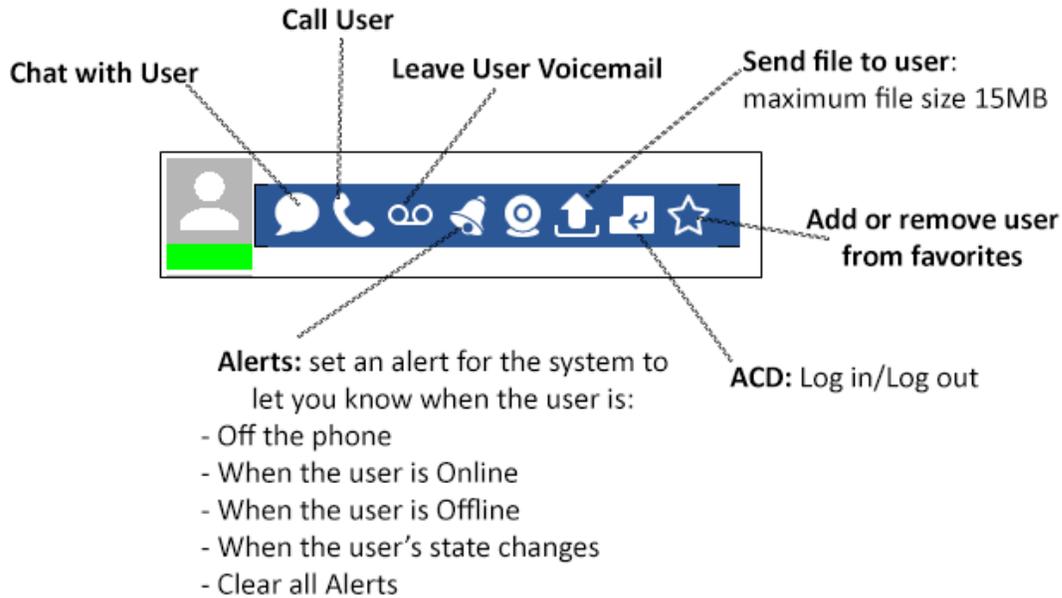
Orange background means the extension is ringing



Green background means the extension is on a call



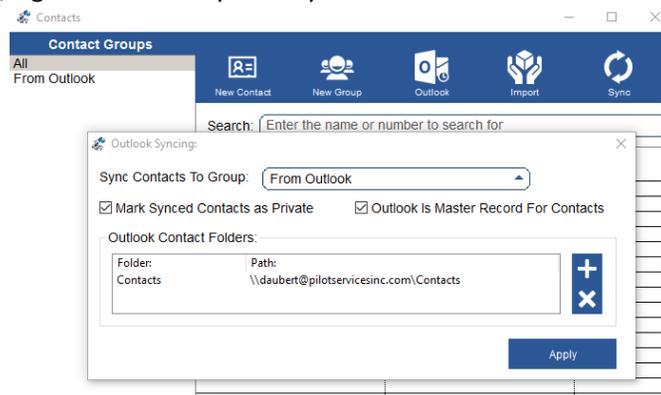
Hover over an extension and you will be presented with various options explained below:



Outlook Integration



1. In Crosswind Connect, click the **Contacts** icon on the left-hand side.
2. Create a new contact group by clicking the New Group button. This will add "New Group" to the left-hand side. Double-click on the New Group to change the name. In the example below the contact group is called "**From Outlook**".
3. Now click the **Outlook** button at the top. In the window that opens select the new contact group you just created where it says "**Sync Contacts To Group**". In the bottom section click the + to select your contacts folder or folders. There are two options you can check, which are explained below:
 - a. **Mark Synced Contacts as Private:** If unchecked, all users in your company will be able to see the contacts. Check this option to keep your contacts private.
 - b. **Outlook Is Master Record For Contacts:** Leave this option checked to keep Outlook as the master for the contacts. This means if you change a contact in Outlook, the change will sync to Connect, but not the other way around.
4. Once you are done click **Apply**. You can then click the **Sync** button, which will synchronize your Outlook contacts with Crosswind Connect. The contacts will appear under the contact group folder you created. To call any of the contacts, right click on the person you want to call and click **Call Contact**.



If you need assistance, please contact Crosswind VoIP Support by emailing support@crosswindsupport.com or by calling (888) 920-5685

The Softphone

Entered number will appear here. You can paste a phone number as well.

Display Screen: current call will be displayed here. Dialpad Mode also displayed here.

Park a call for someone else to pickup. (2 Park Lines)

Place a call on Hold

Redial last call

After dialing a number, hit the Call button to place the call.

Transfer call to another extension

Transfer call directly into someone's voicemail.

Mute your microphone

Conference Call: while on a call, press the CONF button, first call will be put on hold. Hit Line 2 and dial the second party. When they answer, hit CONF and all parties will be in conference.

Line Keys (1-3) , Line States:

Idle Call in progress Call on Hold