

# ShoreTel Communicator User Guide- Professional

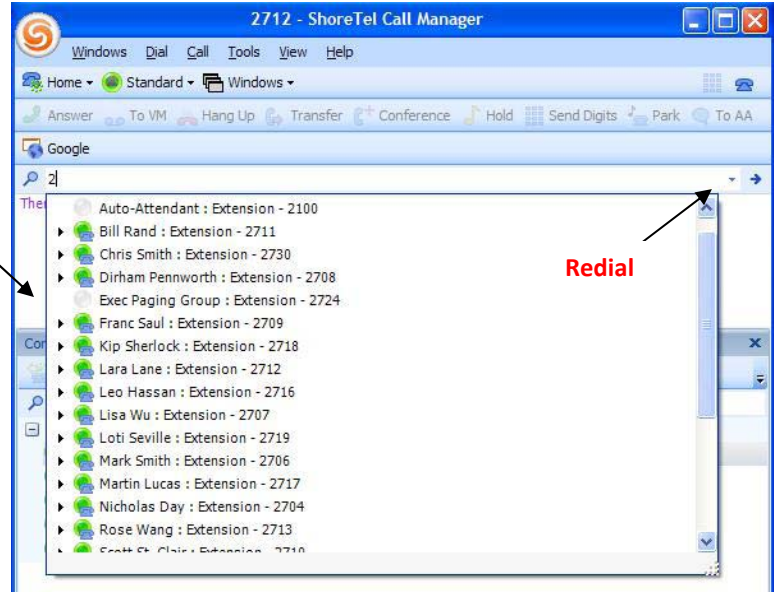
## Using Communicator for Basic Call Handling Features and Functions

### Making Calls

Type Name of desired party or enter Extension Number in Quick Dialer  
 When populated either double click on the name to dial or click → to Dial

**Quick Dialer Panel**

**Data Entry**



**Redial**

### Redial

Click **Redial** arrow and the Quick Dial Panel Shows calls made with a **To** and **From** indicating whether the call was made or received at your extension  
 Click on the party desired and the call will be made

### Answering Incoming Calls

If using a headset you can click **Answer** Screen pop or simply lift the handset  
*(Incoming calls are shown in the Active call pane)*

If you wish to send a caller direct to voicemail press **To VM** button on screen pop and caller will be sent to your voice mail.



**Call Toolbar**

**Active Call Panel**

**Call Control Buttons**

If handling more than one incoming call can click on the ringing call and answer; The first call was automatically placed on hold. Click the 🎵 to make the call active again.

**Placing Calls on Hold**- when a call is placed on hold it's only held at your extension. Click and your call will be placed on hold, press to retrieve call (*reminder ring will ring once after 10 seconds and if ignored will ring in 60 sec Intervals until call is retrieved*)

## Transferring Calls via Communicator

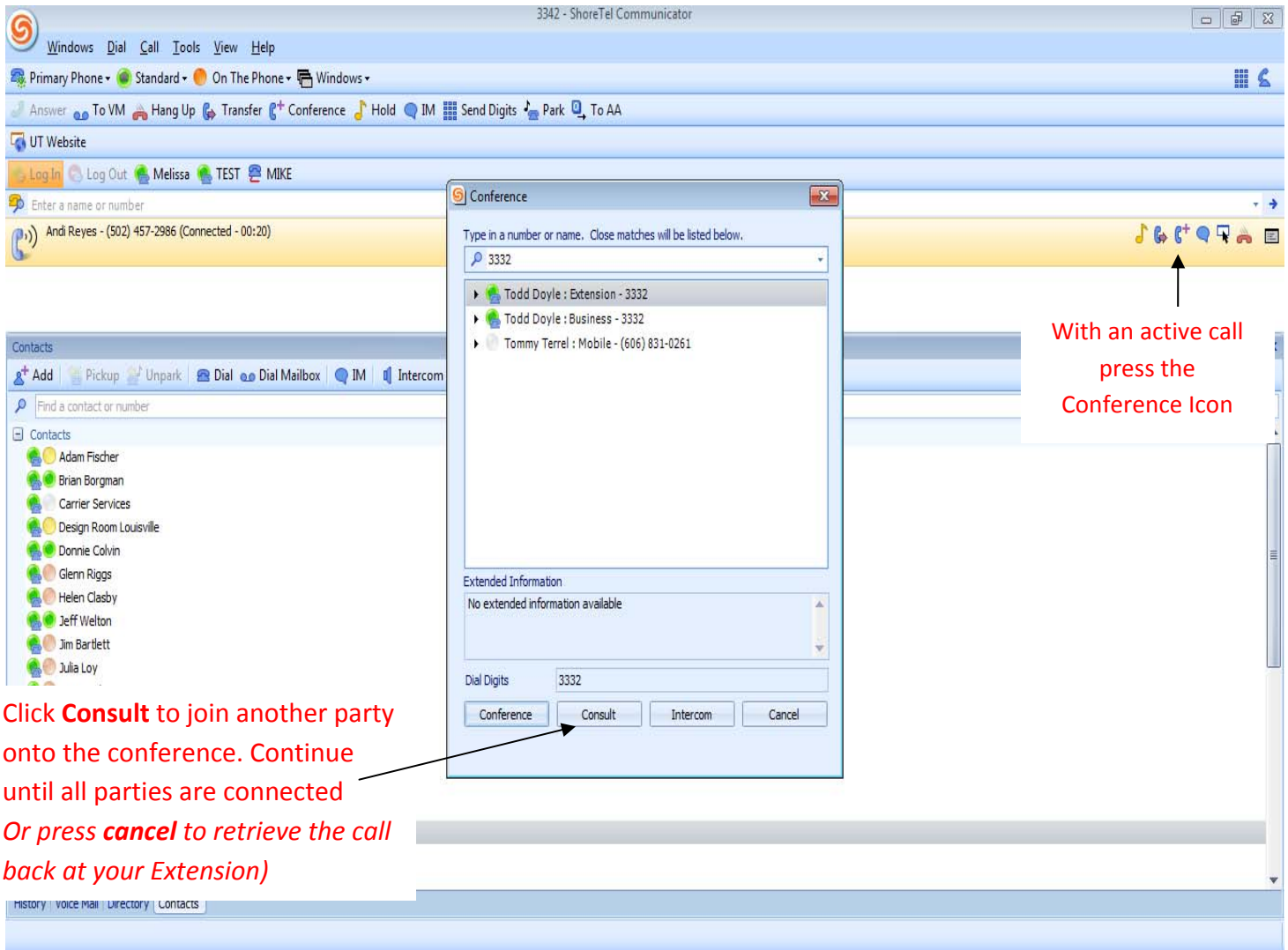
**Enter Name or Number of the party you would like to transfer the call to**

**With an active call press the Transfer Icon**

**Click **Transfer** to blind transfer the call or press **Consult** to announce caller (If click consult press **transfer** to complete transfer Or press **cancel** to retrieve the call back at your**

**If the presence indicates the callers is on another call you may press the **To Mailbox** button to direct the caller direct into voicemail**

**Conference Calls**- allows you to conference up to 6 party's (above 6 would have to be handled via conference bridge server)

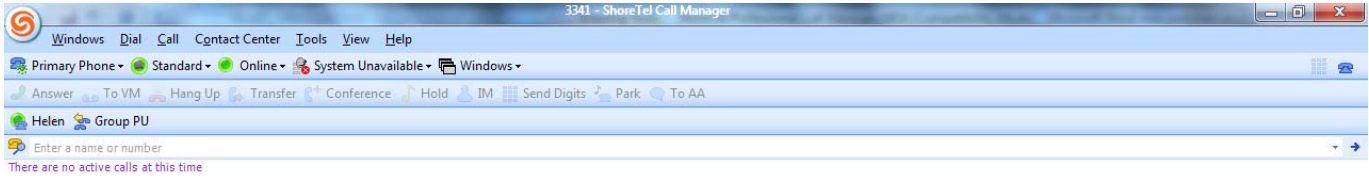


Click **Consult** to join another party onto the conference. Continue until all parties are connected  
*Or press **cancel** to retrieve the call back at your Extension)*

With an active call press the Conference Icon

## Communicator Windows

**Voicemail Viewer**- allows managing voicemail messages (new, saved, & deleted) and sending of voice mail messages visually through Communicator



**VM Tool Bar**

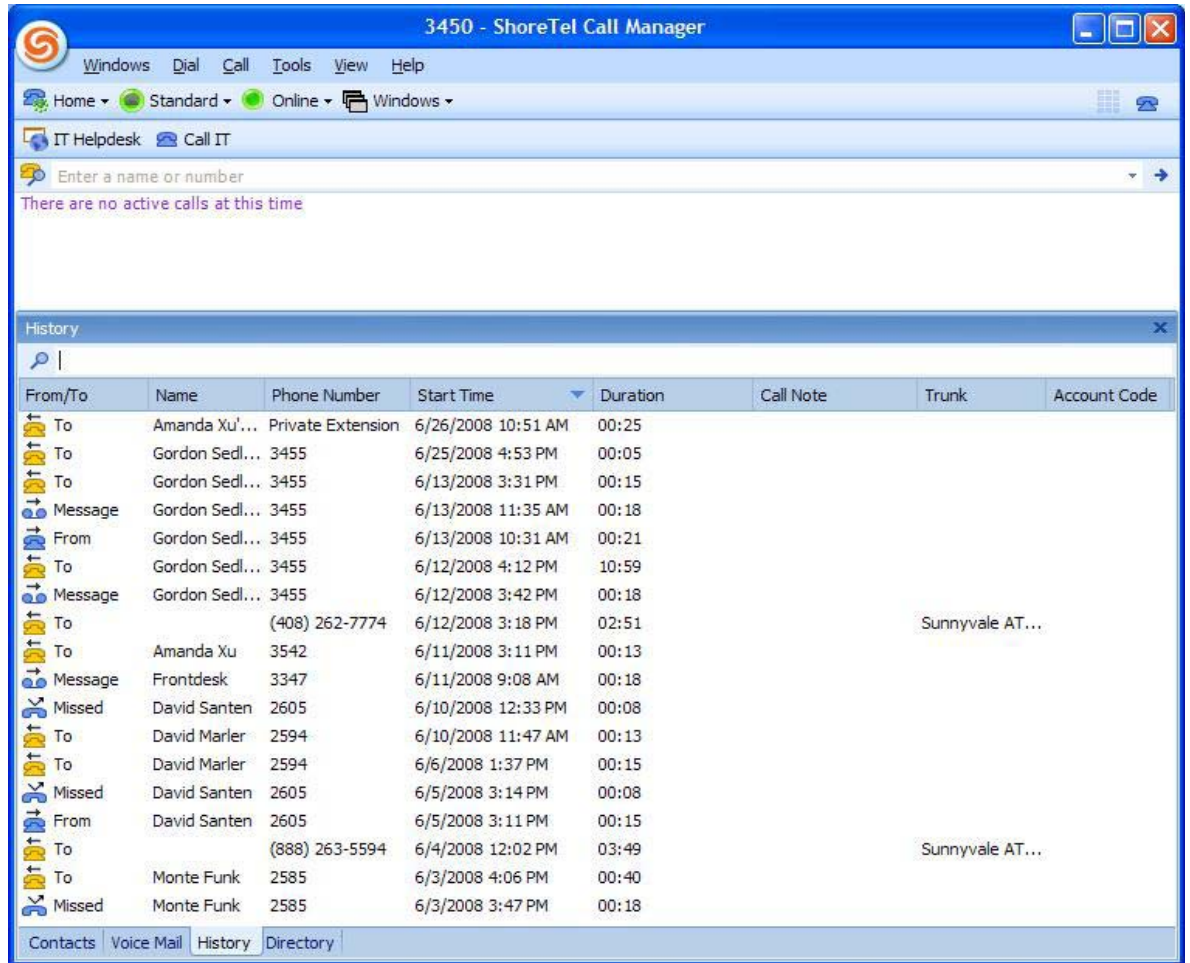
**Messages**

**Playback Navigation**

From	To	Subject	Received	Duration
Helen Clasby, (502) 457-1746	Melissa Johnston, 3341	Voice Message	4/2/2010 7:43 AM	01:24
HOLT EQUIPMENT, (317) 544-3411	Melissa Johnston, 3341	Voice Message	4/8/2010 2:55 PM	00:26
Melissa Johnston, 3341	Melissa Johnston, 3341	Recorded Call (Extension 3341 recorded)	4/8/2010 2:57 PM	07:02
HOLT EQUIPMENT, (317) 544-3411	Melissa Johnston, 3341	Voice Message	4/8/2010 3:25 PM	00:10
ENGINES TRANSMI, (414) 426-0539	Melissa Johnston, 3341	Voice Message	4/14/2010 2:35 PM	00:19
CHAPMAN KELLY I, (812) 285-8960	Melissa Johnston, 3341	Voice Message	4/15/2010 10:47 AM	00:23
INC AUTOTRANSTE, (414) 737-0613	Melissa Johnston, 3341	Voice Message	4/16/2010 11:58 AM	00:31
Louisville Non-Emergency MB, (800) 826-9988	Melissa Johnston, 3341	Message auto forwarded from mailbox 3910: Voice Message	4/23/2010 6:03 PM	00:12
Melissa Johnston, 3341	Melissa Johnston, 3341	Recorded Call (Extension 3341 recorded)	4/26/2010 1:04 PM	05:31
Ron Coleman, 3381	Melissa Johnston, 3341	Return Receipt: Multi-Tech recorded call	4/27/2010 7:53 AM	02:30

**Active Voicemail Viewer Tab**

**History Viewer**- shows the last private incoming and outgoing calls from your extension, includes calls that you may have missed.

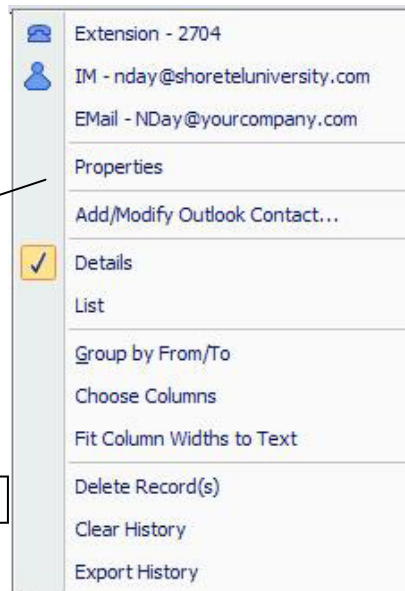
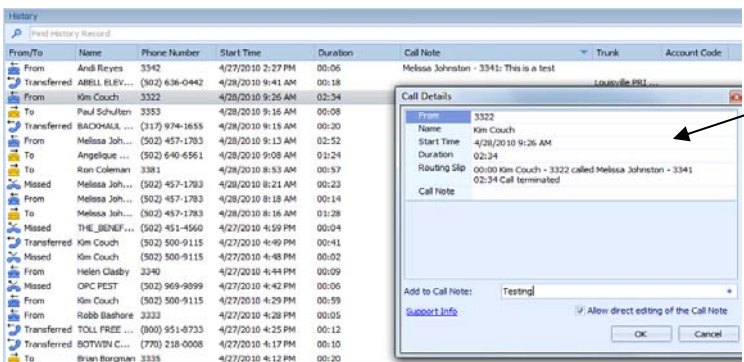


Directory Viewer

Content Area Bar

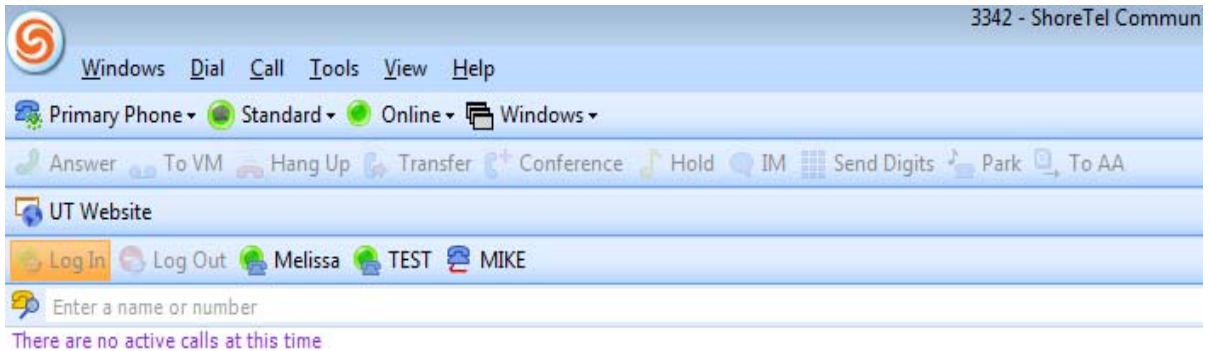
Right Click in History Viewer tab for pop-up Options.

History Viewer Options

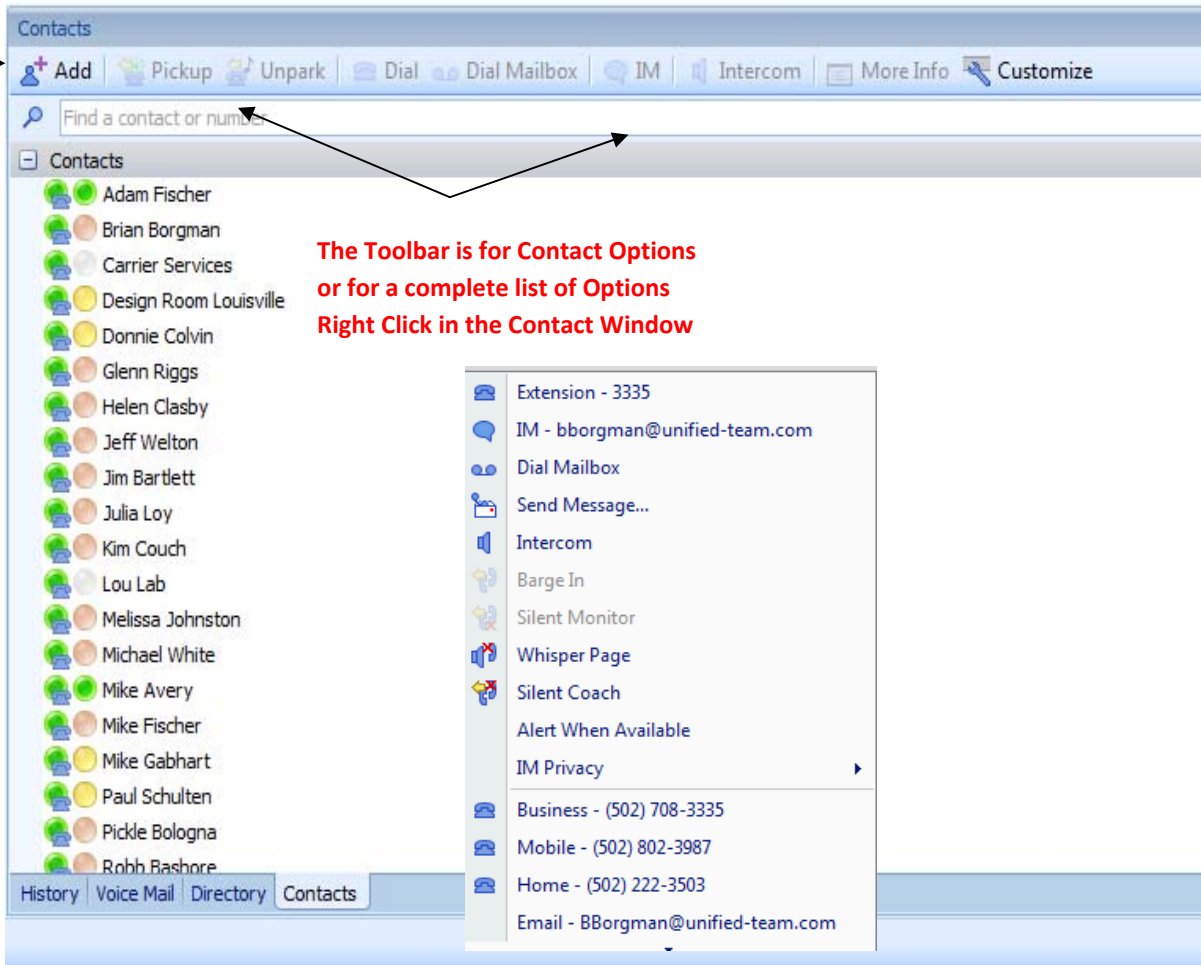
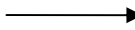


By choosing Properties you can view existing calls notes as well as add new call notes.

**Contacts Viewer-** Allows you to perform tasks such as for handling active calls, send email or voice messages, and create additional contact groups.



**Click to Add  
Contacts**

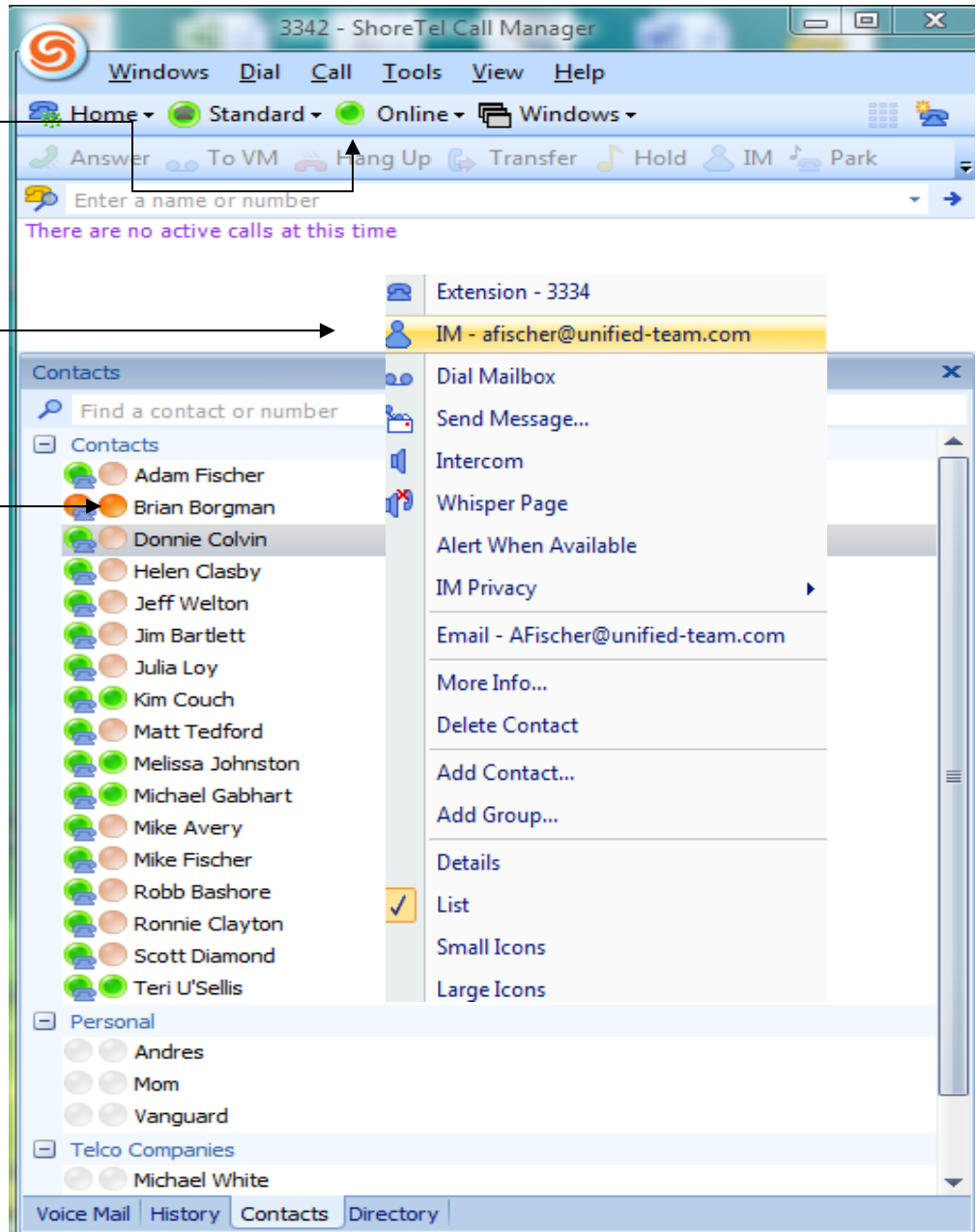


## Instant Messaging Window

Displays your current IM state, use drop down to change your presence

To Send an IM Message Right Click on your Contact, Select IM from the Window

Displays IM status of your contacts



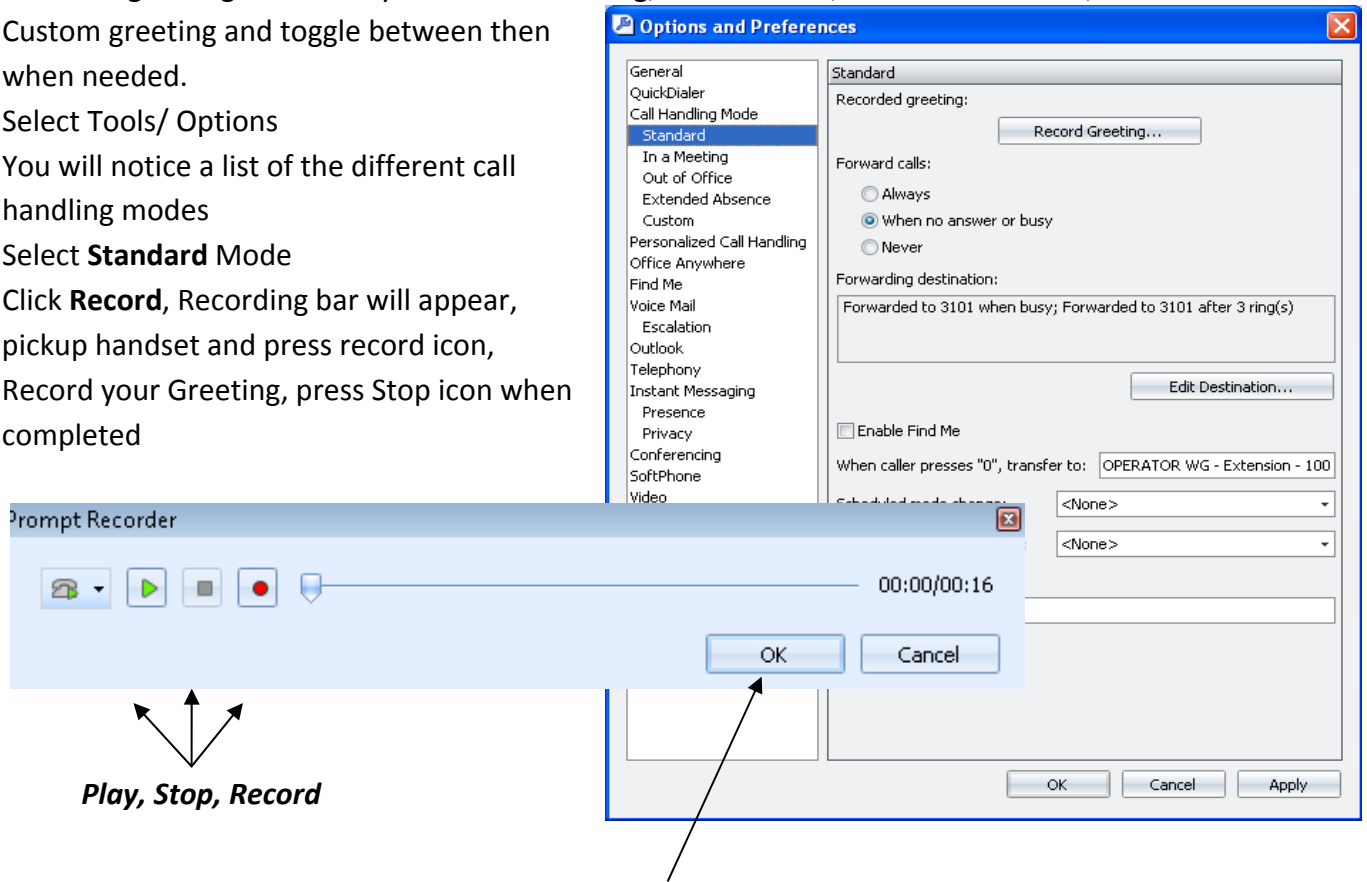
**Configuring Call Handling Modes with Communicator-** allows you to have pre-recorded greetings for when you are In a Meeting, Out of Office, Extended Absence, or record a Custom greeting and toggle between them when needed.

Select Tools/ Options

You will notice a list of the different call handling modes

Select **Standard Mode**

Click **Record**, Recording bar will appear, pickup handset and press record icon, Record your Greeting, press Stop icon when completed



*Play, Stop, Record*

*Press OK to Accept*

***If you have configured the Find Me feature you may select to have that enabled for each mode- see Find Me section for information on how to configure***

Follow above instructions to record other desired modes

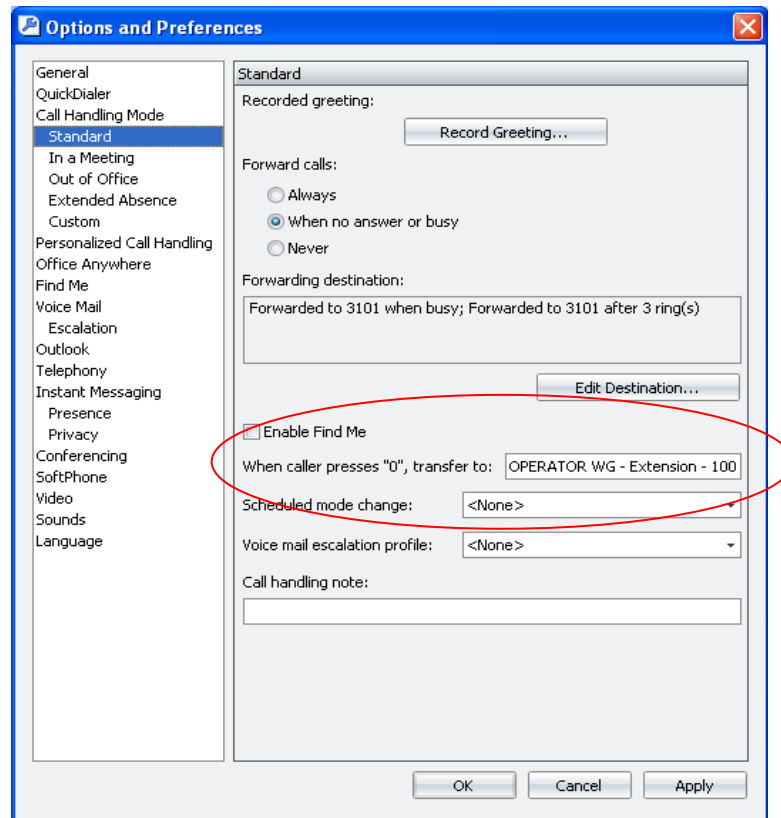
Click **OK** to Save Changes

Repeat Steps to record each mode



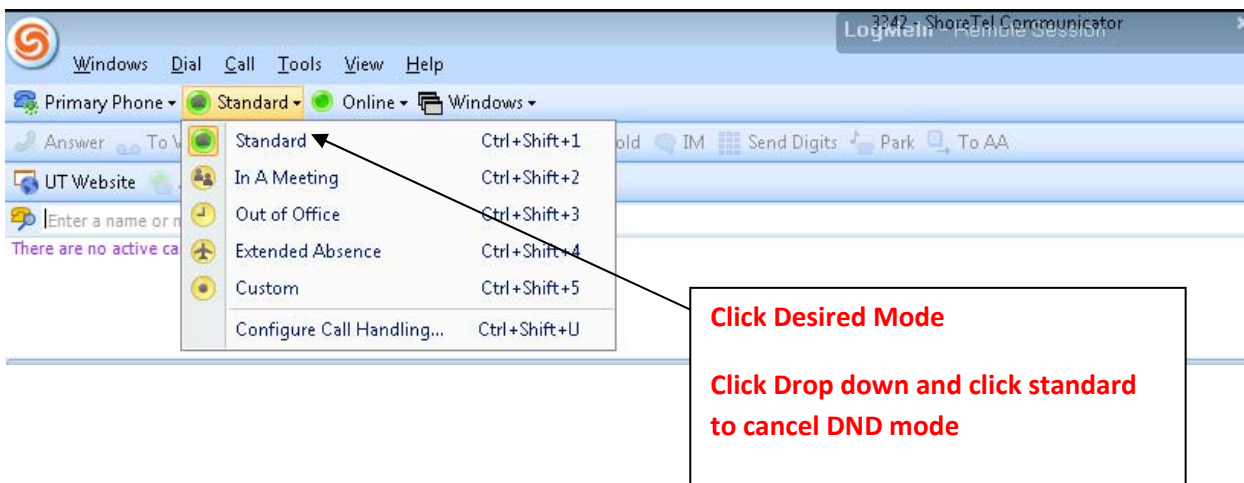
### Choosing "0" Out of Voicemail Destination

If this option is left blank when someone presses "0" out of Voicemail then the call will be forwarded to the Main Operator at each site. You may opt to put an assistant or secretary that you would like your calls to be answered if you are not available and the caller has chosen the "0" opt out of voicemail.



### Changing Call Handling Mode:

Select Drop Down Menu (Standard) Choose mode



**Setting up Find Me Feature-** Callers are able to find you through an alternate phone number through the voice mail system by selecting Option 1 from your Voicemail Greeting. If not answered at the alternate number the caller is given an option to leave a message on the ShoreTel voicemail system.

**To Enable: Select Tools/ Options**

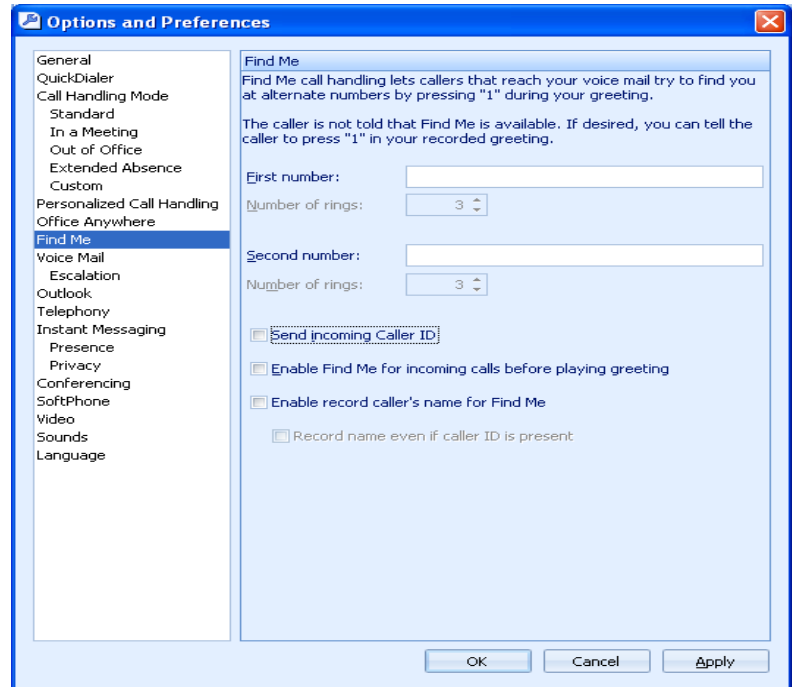
Click Find Me

**First Number-** enter first phone number (cell phone) that you would want tried first  
Select number of rings (3 default)

**Second Number-** if you would like secondary number tried enter in that number and designate number of rings

Check box **Send Incoming Caller ID**

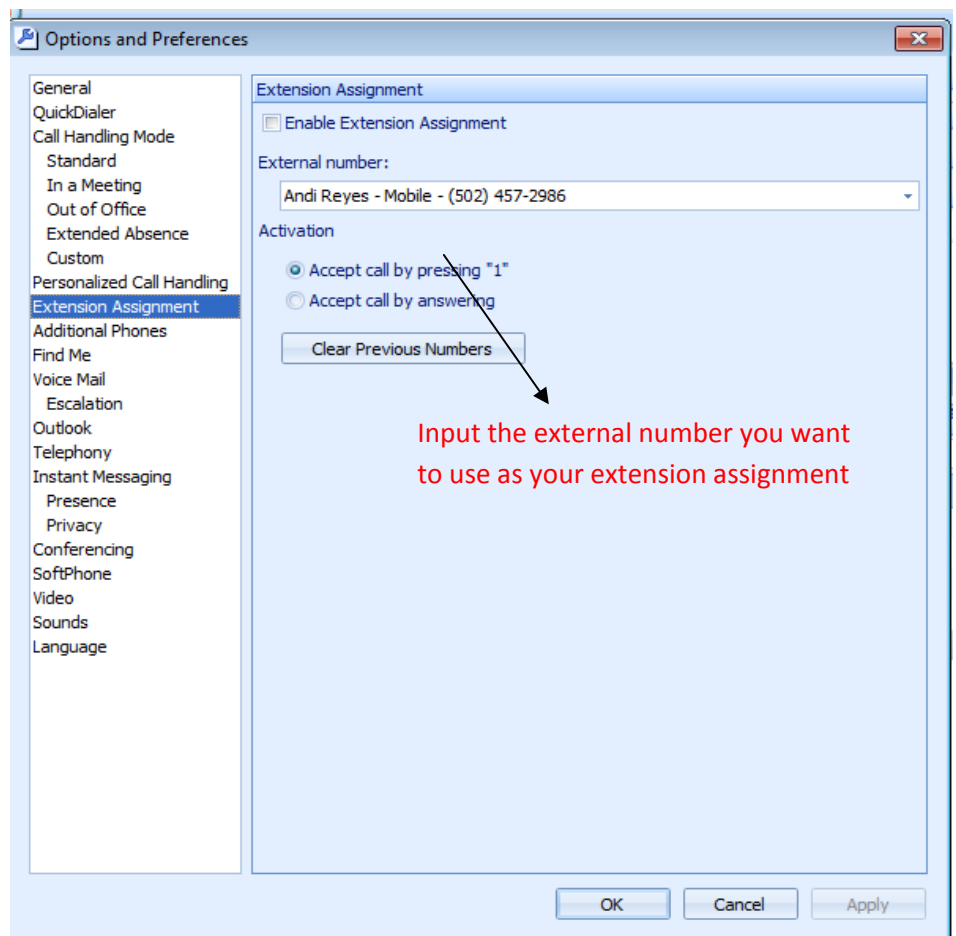
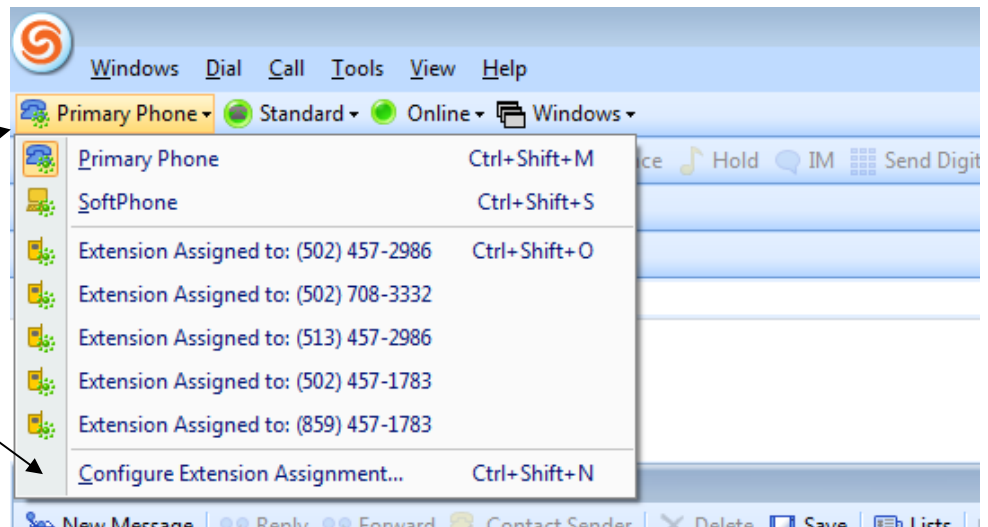
*If you want the caller to have to announce who they are check **Enable record caller's name for Find Me**. Click Ok to Save Changes*



### Activate/ Configuring Extension Assignment

Click Primary Phones Drop Down Menu

Select Configure Extension Assignment

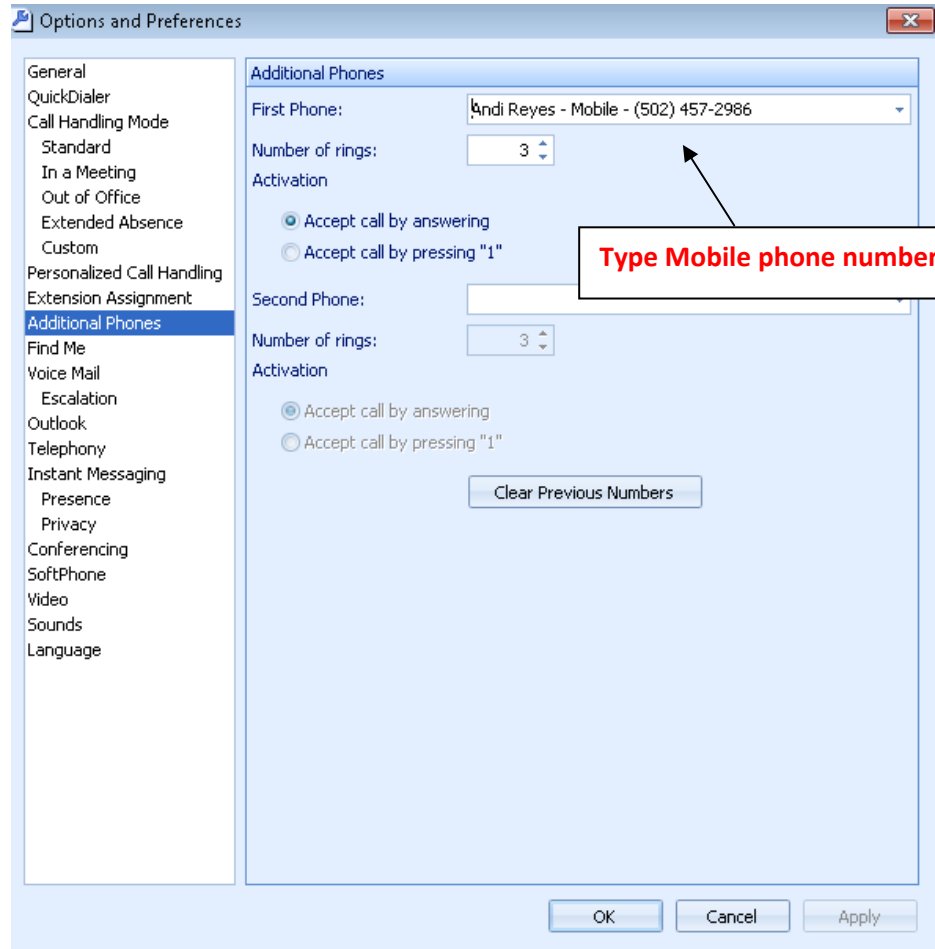


### To Go Back to Desk Phone:

Click drop down where displayed Extension Assignment and Select Primary Phone

**Additional Phones-** *Do you want your cell phone to ring with your desk phone? Or do you want to be able to seamless move your calls from the desk phone to a mobile phone?*

From the Communicator **Select Tools/Options**  
**Select Additional Phones**  
Press OK



When your ShoreTel phone is idle you will notice you will have an additional soft key (next to mode). This soft key will say **Add Off**- this means that your mobile phone will ring at the same time your desk phone will ring.

**To disable press the Add-Off soft key.**

**Call Move-** *Moving an active call to your mobile phone when started on your desk phone*

When on an active call you will notice a soft key that says move. Ask your caller to hold press **move** and your mobile phone will ring. Answer the mobile phone and continue your conversation.

## Outlook Integration

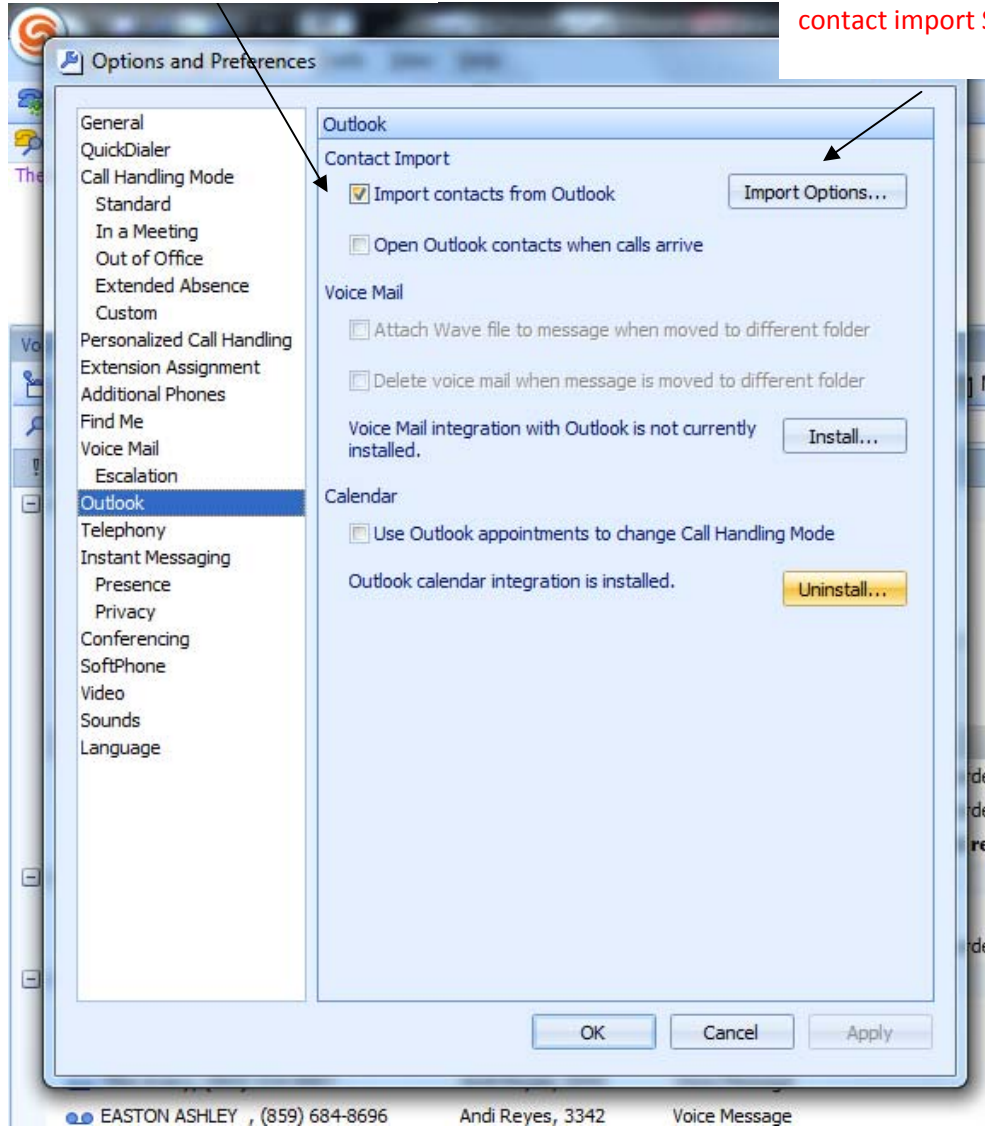
Select **Tools/Options**

Select **Outlook**

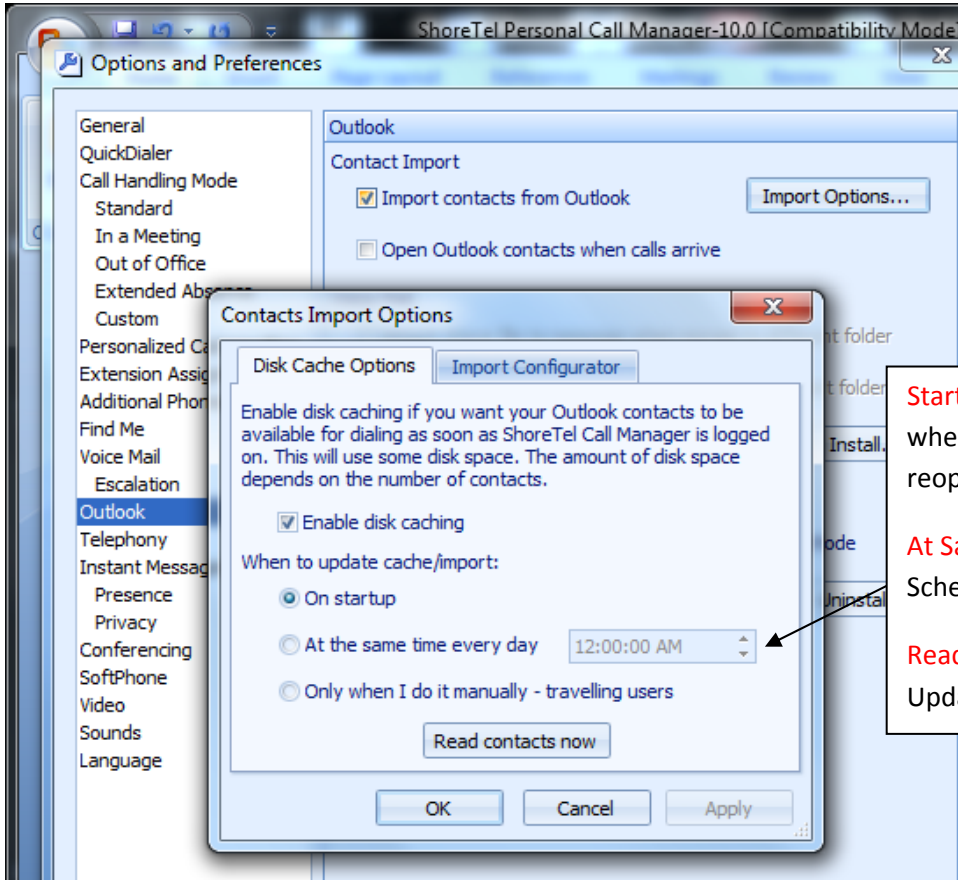
**Import Contact from Outlook**

Should be checked from original Setup

Click Import Options to configure contact import Schedule



After Selecting Import Options

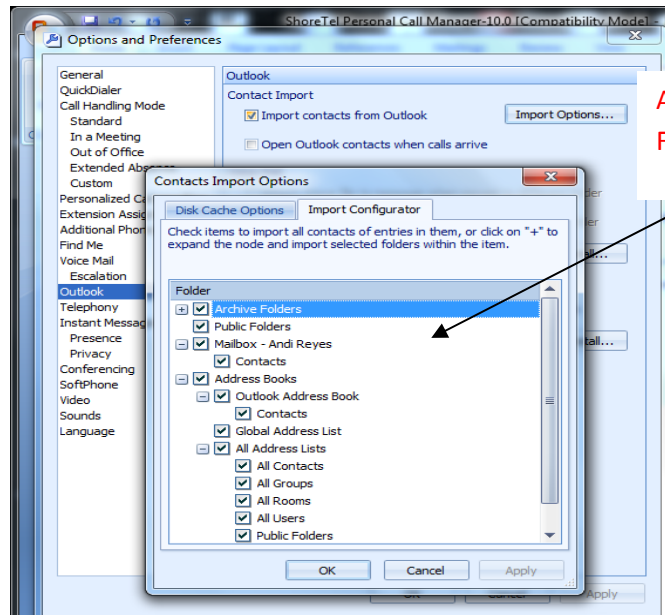


**Startup**- Imports Outlook Contacts whenever your Communicator is reopened

**At Same Time**- Always you to Schedule it

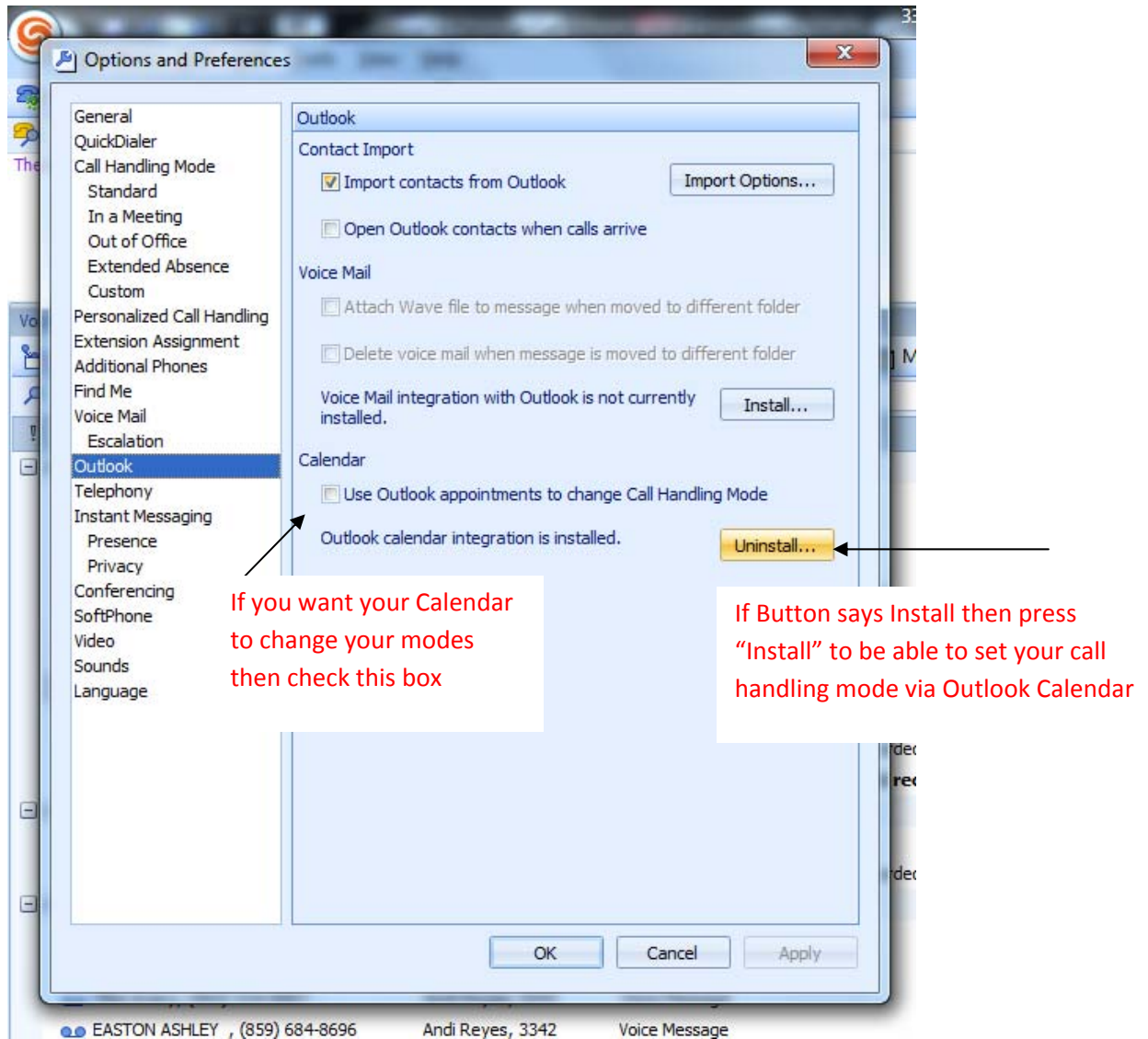
**Read Contacts Now**- Manually Updates Communicator

### Import Configurator



Allows you to choose what Contact Folder you wish to Import

## Outlook Calendar Integration



Next time you schedule an Appointment then you will have an add-in that says Call Handling Mode. This always you to select what mode you would like to remain in while the appointment is scheduled.

**Please Note: Calendar integration must be enabled for Conferencing functionality through Outlook**

## Personal Communicator Key

### Call Control Buttons

	Answer
	Hang up
	Hold
	Transfer
	Conference
	Video
	IM
	Call Notes

### Presence Indicators in Communicator

**Green-** extension is available and currently is Standard Call Handling Mode

**Orange-** extension busy (on another call)

**Red-** extension is in a call handling mode that is in DND and calls are going directly to Voice Mail

**Light Yellow-** extension is being forwarded to another destination (either another extension or cell phone)