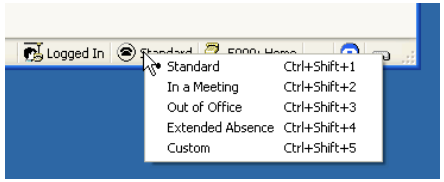
Call Handling Modes

To determine which greeting your caller will hear:

- Click the current Call Handling Mode in the Status Bar.
- Click the desired Call Handling Mode.

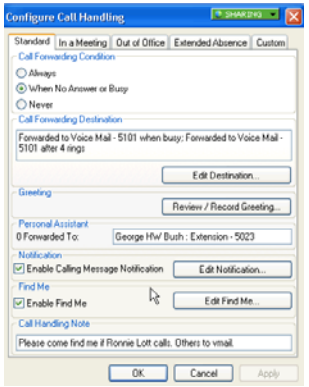


Configuring a Call Handling Mode

To configure Call Handling Modes (to set options for greeting types):

- Right-click .
- Click the "Configure ShoreTel System" option.
- Click the "Edit Call Handling Modes" button (in the Telephony tab).
- Click the tab of the Call Handling Mode you want to configure.
- Select the desired options. (See Options on next page.)
- When finished, click the "OK" button twice.

Shortcut Note: To configure the same settings for all of the Call Handling Modes, choose the "Voice Mail" tab in the "ShoreTel System" dialog box. Click "Edit Notification Settings"or "Edit Find Me Settings"and choose desired settings.



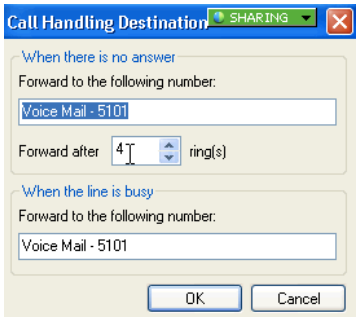
Options for Call Handling Modes:

1) Choose a **Call Forwarding** condition:

– Always

– When No Answer or Busy

– Never

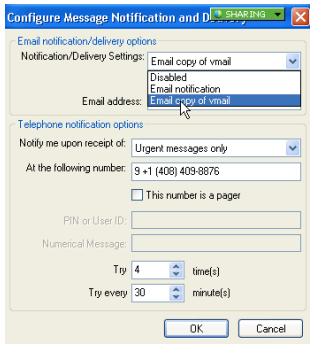


2) Set a **Call Forwarding Destination**:

- Click "Edit Destination" to select the forwarding number and routing plans.

3) **Greeting. To record a greeting:**

- Click "Review/Record Greeting."
- Click the Record button and record your greeting.
- Click Stop when finished.
- Click Play to review.
- Click the "OK" button three times to close each of the dialog boxes.



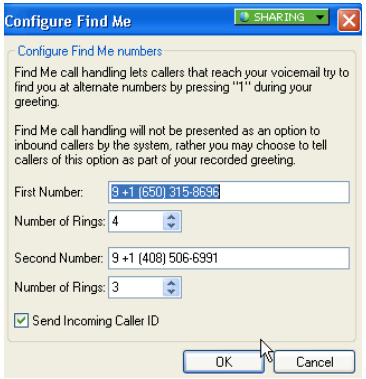
4) Set your **Personal Assistant**: callers are transferred to this number when they press 0 from your mail box.

5) **Notification.**

- Check the "Enable Calling Message Notification" if you wish to be notified upon receipt of a message.
- Click the "Edit Notification" button to configure settings.

6) **Find Me** allows callers to find you at alternate numbers by pressing "1" during your greeting.

- Check the "Enable Find Me" box to enable this feature.
- Click the "Edit Find Me" box to configure settings.



Notes: You must inform your callers in your greeting of this option. When you answer the call, you hear who the call is for and original caller ID. Press 1 to accept the call. Press 2 to send the call to the original mail box. Press 3 to repeat name and caller ID.

7) **Call Handling Note** allows you to enter instructions for your personal assistant when responding to calls.

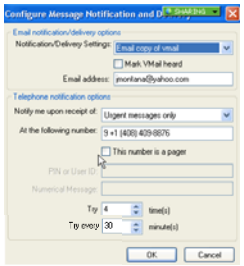
Configuring Message Notification

The **Voice Mail** tab allows you to choose to have the envelope information played, to use your PC speakers for playing messages or recording, to record your name prompt and to edit notification and Find Me settings.

To open the Voice Mail dialog box:

- Right-click .
- Click the "Configure ShoreTel System" option.
- Click the "Voice Mail" tab.
- Select desired options.
- When finished, click "OK" to save settings.

To set e-mail, telephone or pager notification/ delivery options:



- Right-click .
- Click the "Configure ShoreTel System" option.
- Click the "Voice Mail" tab.
- Click the "Edit Notification Settings" button.
- Select desired options.
- When finished, click "OK" to save settings.

Configuring Outlook for Voice Mail

To integrate Outlook and Voice Mail:

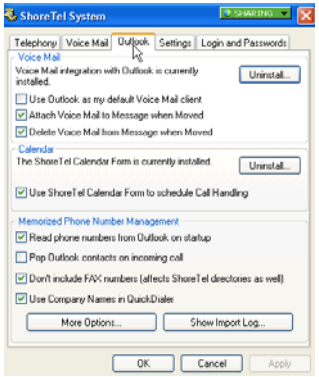
- Right-click .
- Click the "Configure ShoreTel System" option.
- Click the "Outlook" tab.
- Click the "Use Outlook as my default Voice Mail client" option.
- Click "OK."

To include Outlook contacts in your Calling Directory:

- (Repeat first 3 steps above.)
- Click "Read phone numbers from Outlook on startup."
- Click "OK."

To display Outlook contact information when you receive or make calls:

- (Repeat first 3 steps above.)
- Click "Pop Outlook contacts on incoming call."
- Click "OK."



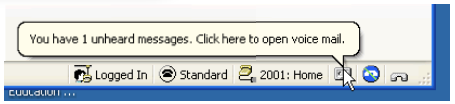
- Desktop application
- Productivity tool
- Point-and-click call management
- Customizable call handling
- Seamless integration with Outlook
- Visual Voicemail
- Unified Messaging

Personal Call Manager
Voice Mail

Quick Reference Guide

Viewing Messages

To view messages in Outlook:

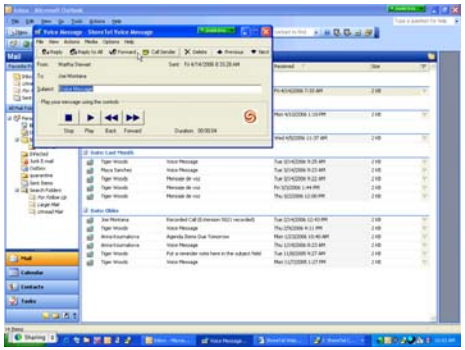


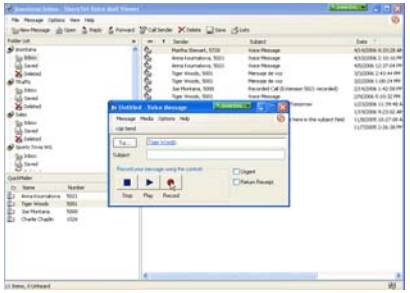
- Click .
- Click the "Voice Mail" button.
- On the Outlook screen, double click the message you want to listen to.

Or • Right click .

- Click the "Voice Mail" option.
- Double click the message you want to listen to.

Note: Depending on the configuration in the ShoreTel System/Voice Mail settings, ShoreTel will either ring your phone or play messages through your PC speakers.





To view messages in the ShoreTel VM viewer:

- Select "Start Programs" > "All Programs" > "ShoreTel" > "ShoreTel Voice Mail."