Personal Call Manager

Step-by-Step Guide

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Using the ShoreTel Personal Call Manager
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ShoreWare Personal Call Manager Overview

The ShoreWare™ Personal Call Manager software allows users to manage every aspect of their business voice communications with customized call handling features that eliminate time-consuming tasks and maximize productivity.

This simple, easy-to-use application provides call control integrated with calendars and direct visual access to both voice and e-mail messages from a familiar Microsoft Outlook desktop interface.

Key Features

- Visual Voice Messaging
- Personalized Call Handling
- Instant name lookup from system directory and Outlook contacts

This document is used to introduce you to some of the most frequently used productivity features within the Personal Call Manager, including point-and-click call management, voice mail integration with Microsoft Outlook, and a broad range of call handling capabilities.

For more detailed information, use the ShoreWare™ Personal Call Manager Help System to access documentation and online help.

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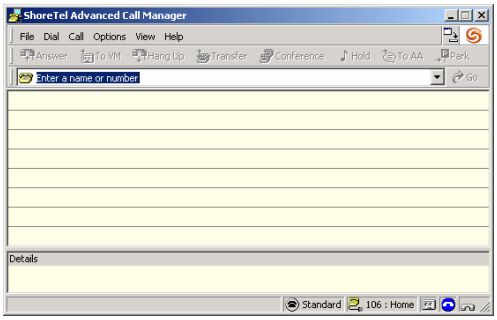
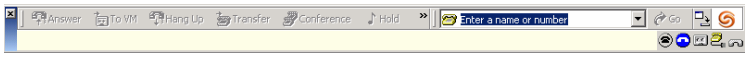
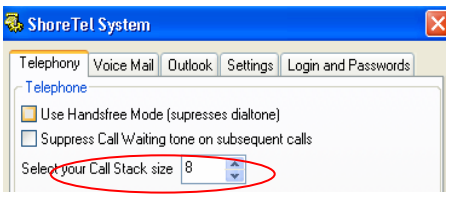
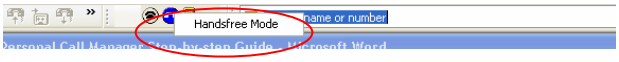
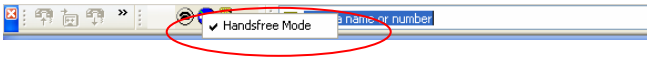
Basic Call Handling

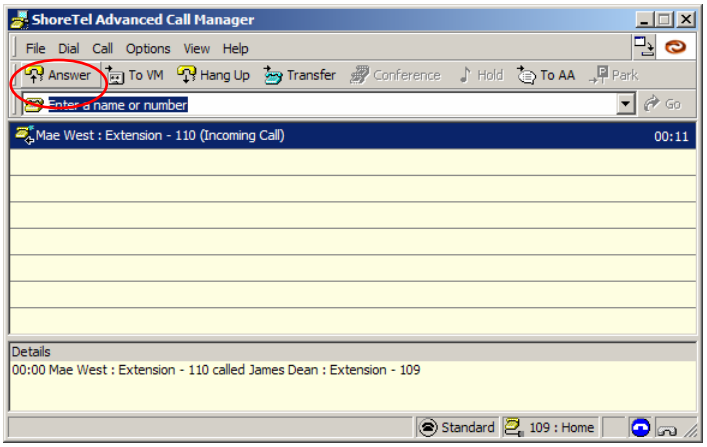
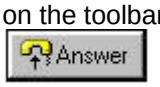
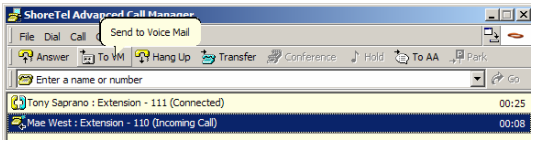
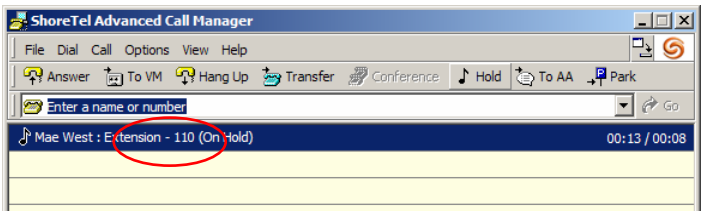
Task	Step-by-Step Instructions
Launching Call Manager	There are two ways to start Call Manager: from the Windows Start menu or by setting Call Manager to auto-start each time you log in to your computer. . **To start your Call Manager from the** Start **menu:** 1. Click **Start**, select **Programs**, select **ShoreTel Communications**, and click **ShoreTel Call Manager**. Call Manager opens. **To auto-start Call Manager at log in:** 1. Right-click the ShoreTel icon, a shortcut menu will appear. Click **Configure ShoreTel System**. The **ShoreTel System** dialog box appears. 2. Click the **Settings** tab. Select **Start Call Manager automatically when I log into Windows**. Click **OK**.
Quitting Call Manager	**To quit Call Manager:** **1. Right-click the Call Manager icon in the Windows status area. A shortcut menu appears.** **2. Click** Exit. **The Call Manager application quits.**

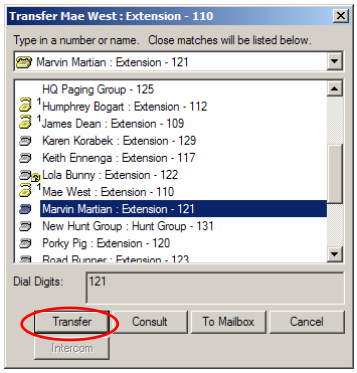
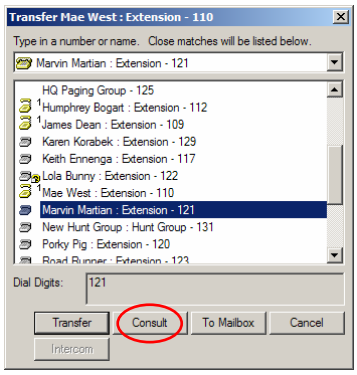
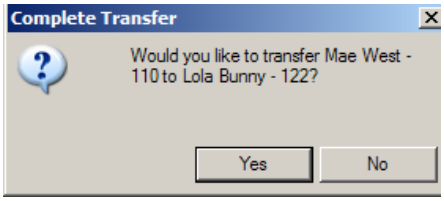
Task	Step-by-Step Instructions
Call Manager Views   	<u>Compact View:</u> This view appears when you first open the Call Manager application. This view provides access to most functions of the toolbar. Additional features are available if you right-click the ShoreTel icon. <u>Detailed View:</u> This view provides the *QuickDialer*, the *Active Call* list and the *Call Details* area at the same time. In this view, the menus provide access to all features. <u>Docked View:</u> This view is like a toolbar that can be docked for quick access at the bottom or top of the Windows desktop. The **Collapse/Expand** buttons can be used to switch between views.
Using the Help System 	<u>In the Compact view:</u> Right-click on the ShoreTel icon. 1. Choose **Help > Contents and Index** from the shortcut menu. <u>In the Detailed view:</u> 1. Choose **Contents and Index** from the drop down menu. <u>In the Docked view:</u> 1. Right-click on the ShoreTel icon. 2. Choose **Help > Contents and Index** from the shortcut menu, or 3. From the **Help** Menu, choose **Contents and Index**.

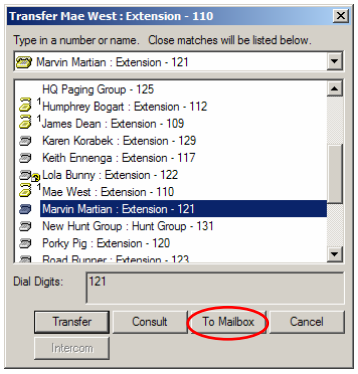
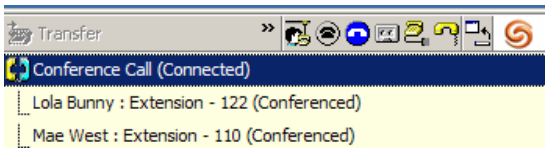
Task	Step-by-Step Instructions
Making a Call 	1. In the Personal Call Manager Quick Dialer, select the text **Enter a name or number**. 2. Type the name or number of the person you want to call. 3. Press the **Enter** key to dial the number. The Active Call List displays the status of the call (Outgoing call).
QuickDialer Tips	The fastest way of using the **QuickDialer** is to start typing the name or number of the person you wish to call. The QuickDialer looks up contacts by partial names, whole first or last names, initials or by company name.. You can use the QuickDialer to redial recently called numbers. 1. Click the QuickDialer drop down list arrow. 2. Select the person's name from the list. You can drag a phone number from a document or a Web site and drop it in the QuickDialer. If you drag by using the left mouse button, the number is pasted into the QuickDialer. When using the right mouse button to drag the number, you can dial the number automatically or paste it into the QuickDialer. If you have 50 or less entries in your redial list, use the down arrow key to select the person you want to call and the press the **Enter** key.

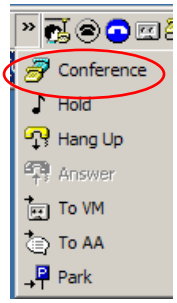
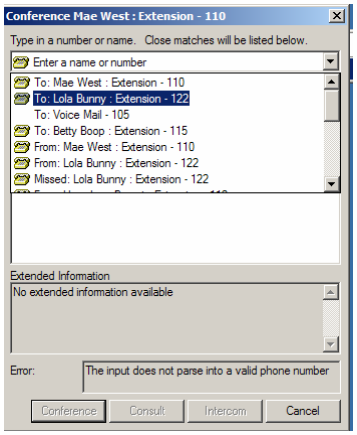
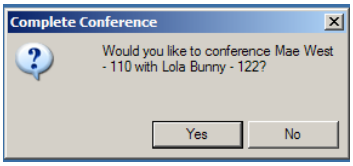
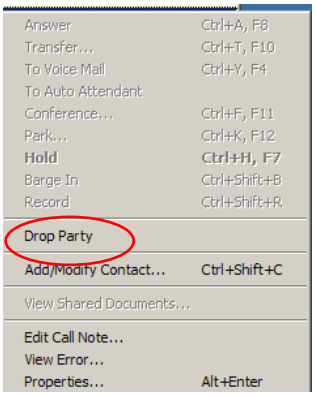
Task	Step-by-Step Instructions
What is a Call Stack?	The call stack size is the maximum number of incoming and outgoing calls that you can handle with Personal Call Manager. The call stack size determines the number of calls you can receive before the next call is treated as busy. Even when your call stack is full, Personal Call Manager allows you to place one more outgoing call for performing consultative conferences and transfers. Your call stack size cannot exceed the number configured by your system administrator.
Configuring the Call Stack Size 	<u>From the Personal Call Manager Compact view:</u> 1. Right-click the ShoreTel icon. 2. Click **Configure ShoreTel System** from the shortcut menu. The ShoreTel System dialog box appears. 3. Click the **Telephony** tab. The ShoreTel System Telephony dialog box appears. 4. In the **Telephone** section, enter the stack size in the **Select your Call Stack Size** box. 5. Click **OK** to close the dialog box.
What is Handsfree Mode?	Use the Handsfree mode when you want to free your hands up by using a headset or speakerphone. When the Handsfree Mode is activated, ShoreTel suppresses dial tone to the telephone. .

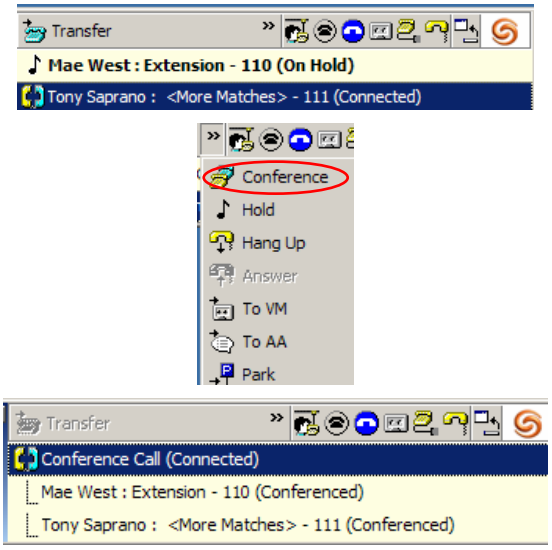
Task	Step-by-Step Instructions
Activating Handsfree Mode  	<u>From the Personal Call Manager Compact view:</u> 1. Right-click the **Not in Handsfree** icon. The **Handsfree Mode** shortcut menu appears. 2. Click the **Handsfree Mode** menu option to display the check mark. 3. Personal Call Manager switches to the handsfree mode the icon on the toolbar changes to the **Handsfree** icon.
Turning Handsfree Mode off  	<u>From the Personal Call Manager Compact view:</u> 1. Right-click the **Handsfree Mode** icon. The **Handsfree Mode** shortcut menu appears. 2. Click the **checkmark** in the **Handsfree Mode** menu. The Personal Call Manager turns off the **Handsfree Mode** and the icon in the tool bar changes to **Not in Handsfree Mode**.

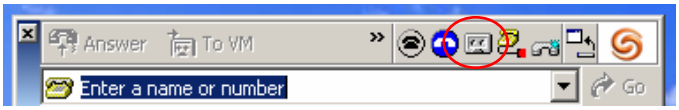
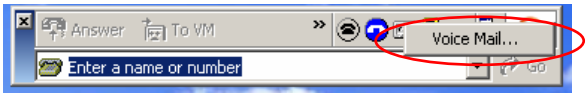
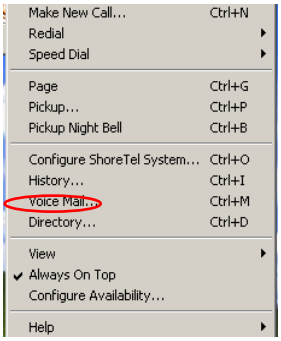
Task	Step-by-Step Instructions
Answering a Call  	<u>To answer an incoming call when not in Handsfree Mode:</u> 1. Pickup the telephone receiver when it rings and begin to talk. 2. The call status in the Active Call List displays (Connected) and the **Connected** icon appears. <u>To answer an incoming call in Handsfree Mode:</u> 1. Click the **Answer** button on the toolbar.  2. The call status in the Active Call List displays (Connected) and the **Connected** icon appears. 3. Begin talking.
Sending a Call to Voice Mail  	<u>From the Personal Call Manager Compact view:</u> 1. Highlight the incoming call. 2. Click the **To VM** button.
Placing the Active Call on Hold  	<u>Answer your incoming call:</u> 1. The call appears in the Active Call List. The call status displays (Connected) and the **Connected** icon appears. 2. Double-click the call in the Active Call List to be placed on hold. 3. The Call Status displays (On Hold). 4. Double-click the call on hold to take the call off hold.

Task	Step-by-Step Instructions
Transferring a Call  	<u>From the Personal Call Manager Compact view:</u> 1. Click the **Transfer** button. The Transfer dialog box appears. 2. In the **Dial** box, enter the name or number where you want to transfer the call. 3. Select the desired name or number. 4. Click the **Transfer** button to transfer the call
Consultative Transfer   	<u>From the Personal Call Manager Compact view:</u> 1. Click the **Transfer** button. The Transfer dialog box appears. 2. In the **Dial** box, enter the name or number where you want to transfer the call. 3. Select the desired name or number. 4. Click the **Consult** button. The phone you are transferring to rings and the "Complete Transfer" message appears on your screen. 5. When the party answers, you can confer with them before transferring the caller. 6. Click **Yes** to transfer the call. The caller is then transferred. 7. Click **No** to cancel the transfer. The caller remains on your line.

Task	Step-by-Step Instructions
Transferring a Call to Another Person's Voice Mail  	<u>From the Personal Call Manager Compact view:</u> 1. Click the **Transfer** button. The Transfer dialog box appears. 2. In the **Dial** box, enter the name or number of where you want to transfer the call. 3. Select the desired name or number. 4. Click the **To Mailbox** button. The call is transferred to the selected number's voice mailbox.
Making a Conference Call  	<u>To add a third party to an active call from the Personal Call Manager Compact view:</u> 1. Click the **Conference** button. The Conference dialog box appears. 2. In the **Dial** box, enter the name or number of the third party you want to add. 3. Select the desired name or number. 4. Click the **Conference** button. The new caller is now on the line and the active call lists displays (Conferenced) beside each caller on the conference.

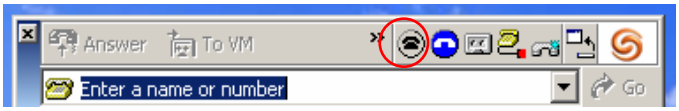
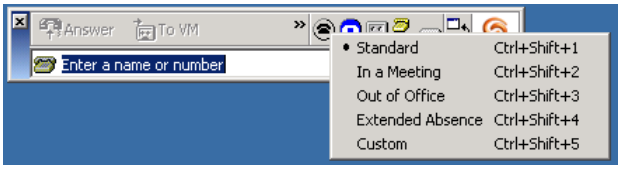
Task	Step-by-Step Instructions
Making a Consultative Conference Call    	<u>To add a third party to an active call from the Personal Call Manager Compact view:</u> 1. Click the **Conference** button. The Conference dialog box appears. 2. In the **Dial** box, enter the name or number of the third party you want to add. 3. Click the **Consult** button. The "Complete Conference" message appears. Phone of the person being conferenced in rings. When they answer, you have a chance to talk to them. 4. Click **Yes** to connect the new party to the conference. The **Active Call List** displays the status of the callers. 5. Click **No** to cancel adding the person to the conference call. The original caller(s) remain on the line.
Dropping a Party from the Conference Call  	<u>You can drop a single party from the conference call in Personal Call Manager Compact view:</u> 1. Right-click on the party you want to drop. A pop-up menu appears. 2. Click **Drop Party**. 3. The party is dropped from the conference call.

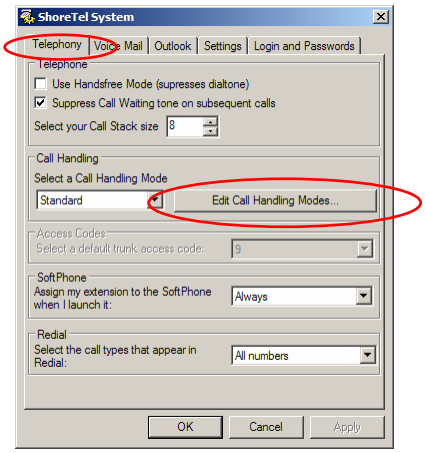
Task	Step-by-Step Instructions
Joining Two Active Calls in a Conference Call  	<u>You can create a conference call by joining two active calls:</u> 1. Place the first call on hold. 2. Answer the second call. 3. Select the call on hold with a single mouse click from the **Active Call List**. 4. Click the **Conference** button. The two calls are joined together, creating a conference call. **Note:** You cannot have both calls on hold to activate the conference call.
Hanging Up from a Call 	<u>To hang up an active call when not in Handsfree mode:</u> 1. Put the receiver on hook. Your active call is disconnected. To hang up an active call in Handsfree mode: 1. From the Compact view, click the **Toolbar Extender >>**. A pop-up Tool Bar appears. 2. Click the **Hang Up** button. Your active call is disconnected.

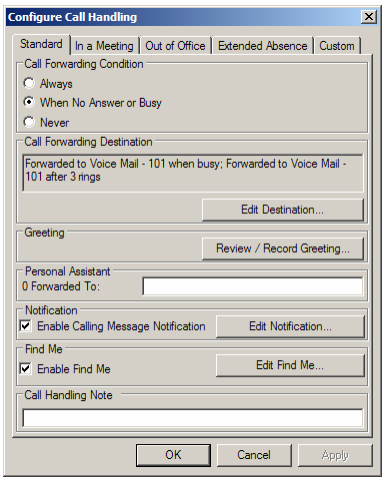
Task	Step-by-Step Instructions
Viewing Voice Mail Messages in Outlook    	<u>From the Personal Call Manager Compact view:</u> 1. When a new voice message arrives, a cassette tape icon appears. 2. Click the **Cassette** icon. A pop-up menu appears. 3. Click the **Voice Mail** button**.** Voice Mail... 4. The Outlook Messages screen appears. 5. Double-click the message you want to listen to. <u>From the ShoreTel icon:</u> 1. Right-click the ShoreTel icon. A shortcut menu appears. 2. Click the **Voice Mail** option. The Outlook Messages screen appears. 3. Double click the message you want to listen to. **Note:** Depending on your configuration in the **ShoreTel System/Voice Mail** settings, ShoreTel will either ring your phone or play your voice mail messages through your PC speakers.

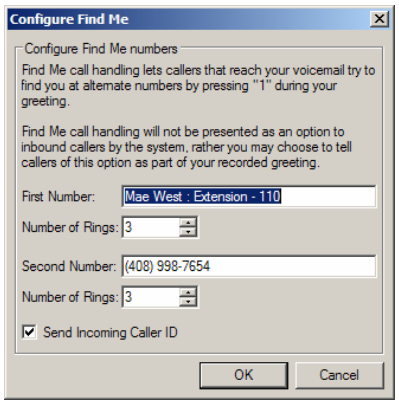
3

Configuring Personal Call Manager

Task	Step-by-Step Instructions
What are Call Handling Modes?	Call Handling modes provide different options for handling calls. You can have different call handling options to manage incoming calls when you are in a meeting, working from home or out of town. Each mode also allows for a different voice mail greeting.
Selecting a Call Handling Mode   	Available Call Handling Modes are: Standard In a Meeting Out of the Office Extended Absence Custom <u>From the Personal Call Manger Compact view:</u> 1. Click the current **Call Handling Mode** icon in the Status Bar. A shortcut menu appears with a list of the five modes. 2. Click the desired **Call Handling Mode**. The indicator for the selected mode appears.

Task	Step-by-Step Instructions
Configuring A Call Handling Mode  	<u>From the Personal Call Manager Compact view:</u> 1. Right-click the ShoreTel icon. A shortcut menu appears. 2. Click the **Configure ShoreTel System** option. The ShoreTel dialog box appears. 3. Click the **Edit Call Handling Modes** button under the Telephony tab. The Configure Call Handling dialog box appears. 4. Click the tab of the Call Handling Mode you want to configure. 5. Select the desired options for the mode you are configuring. <u>Call Forwarding Condition:</u> **Always** – Your calls are forwarded to the selected Call Handling Mode destination even if you are available. **When No Answer or Busy** **Never** – Your calls will never be forwarded to another Call Handling Mode. <u>Call Forwarding Destination:</u> **Box** – Displays your current call forwarding destinations and routing schemes. **Edit Destination** button – Opens the Call Handling Destination dialog box and allows you to select the forwarding number and routing plans for incoming calls in the selected Call Handling Mode. <u>Greeting:</u> **Review/Record Greeting** – Opens the Prompt Recorder dialog box to record and play the greeting for this Call Handling Mode.





Personal Assistant:

0 Forwarded To – Displays your current selection for a personal assistant to whom callers are transferred when they press 0 and do not want to leave a voice message.

Notification:

Enable Message Notification – A check in this box means that the ShoreTel system automatically notifies you of the arrival of voice mail messages, as determined by your message notification settings.

Edit Notification button – Opens the Configure Message Notification dialog box where you can configure when and where you are notified of new messages.

Find Me Call Handling:

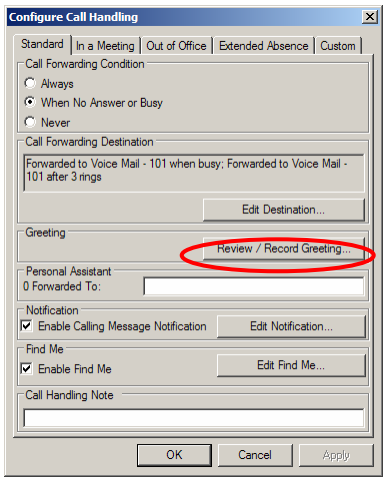
You can use Find Me call handling to allow callers who reach your voice mailbox to try and find you at alternate numbers by pressing "1" during your outgoing greeting.

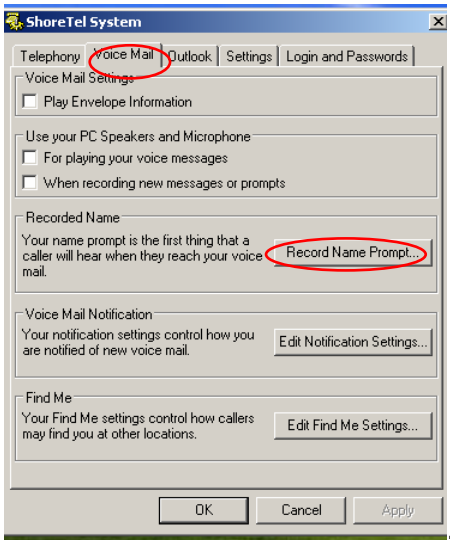
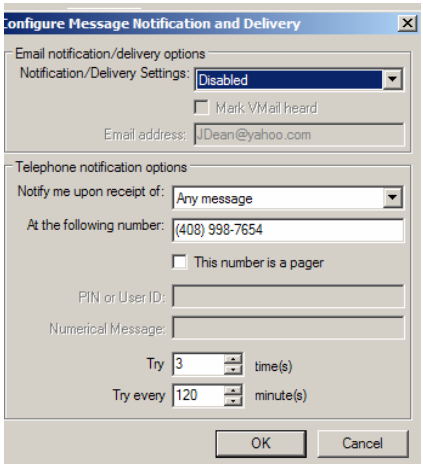
Note: There is no prompt instructing the caller on this option. You must inform callers of this option in advance or in your recorded greeting.

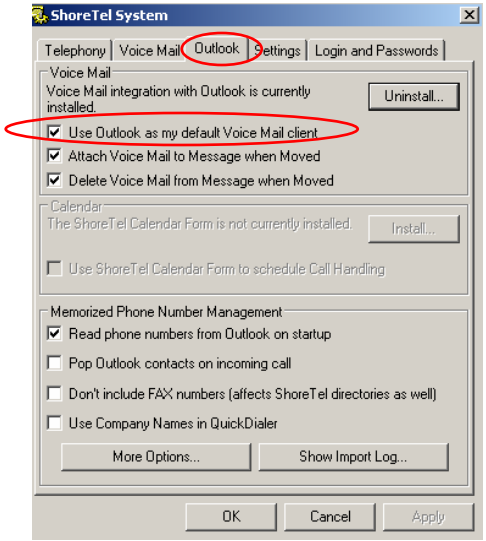
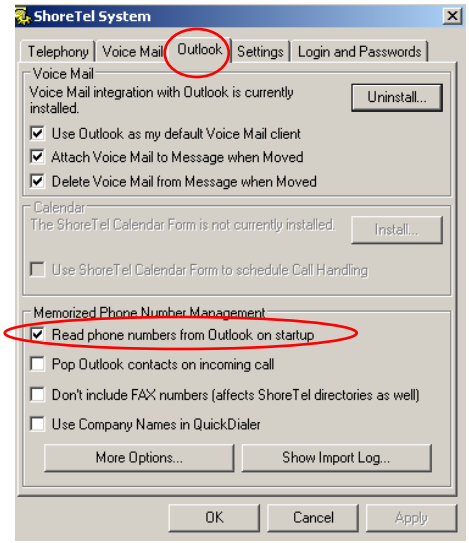
When the callers press 1, they hear a prompt telling them that the Find Me destinations are being called. If the call is not accepted at either of the Find Me destinations, the call is sent to your voice mail.

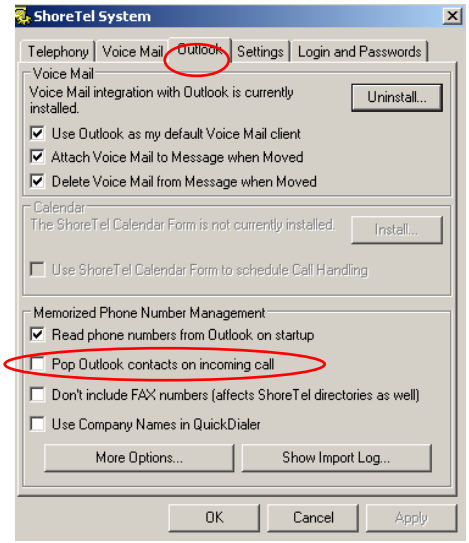
1. Specify up to two alternate numbers where you want callers to be able to find you.
2. Set the number of rings (6 second intervals) that Find Me call handling will wait for an answer at each destination.

	Note: You can enable/disable Find Me call handling for each of the 5 call handling modes. When a call is forwarded to a Find Me destination, the phone at the Find Me destination displays the caller ID of the voice mail. When you answer the call, you hear a prompt announcing who the call is for and the original caller ID. You are prompted with the following options: - Press **1** to accept the call. - Press **2** to send the call back to the original voice mail box. - Press **3** to repeat the name and caller ID. <u>Call Handling Note:</u> This is the place to enter special instructions for your personal assistant when responding to incoming calls. 6. Click the **OK** button twice to complete the configuration and close the dialog boxes.

Task	Step-by-Step Instructions
Recording a Greeting for a Call Handling Mode  	You can record specific greetings for each of the Call Handling Modes. If you record a greeting for only one of the modes, it is only used when call handling mode is set for that mode. When there is no recorded greeting for a mode, the ShoreTel system announces your recorded name and the standard greeting for that mode. <u>From the Personal Call Manager Compact view:</u> 1. Right-click the ShoreTel icon. A shortcut menu appears. 2. Click the **Configure ShoreTel System** option. The ShoreTel System dialog box appears. 3. Click the **Edit Call Handling Modes** button. The Configure Call Handling Modes dialog box appears. 4. Click the tab of the Call Handling Mode you want to configure. 5. Click the **Review/Record Greeting** button. The Prompt Recorder dialog box appears. 6. Click the **Record** button and record your message. 7. Click **Stop** when you complete your message. 8. Click **Play** to review your message. 9. Click the **OK** button three times to close each of the dialog boxes.

Task	Step-by-Step Instructions
Configuring Message Notification   	<u>From the Personal Call Manager Compact view:</u> 1. Right-click the ShoreTel icon. A shortcut menu appears. 2. Click the **Configure ShoreTel System** option. The ShoreTel System dialog box appears. 3. Click the **Voice Mail** tab. 4. In the Voice Mail Notification section, click the **Edit Notification Settings** button. The Configure Message Notification dialog box appears. 5. Select the desired options for receiving message notifications. - What type of messages you want to be notified about. - Phone number where you want to be called. - How many times and how often voice mail should try to notify you of new messages. 6. Click **OK** to save settings. **Note:** Your next voice mail or e-mail message will respond to your new settings.
Integrating Outlook with Personal Call Manager	If you choose to integrate MS Outlook with Personal Call Manager, all your voice mail messages appear in your Outlook Inbox, making it easy to retrieve and respond to messages in any order. With integrated voice messages, you can also forward voice mail to any e-mail destination, giving you the power of multi-media messaging. Before you can take advantage of integrating Personal Call Manager with Outlook, you must install the Outlook integration features.

Task	Step-by-Step Instructions
Configuring Outlook for Voice Mail  	Personal Call Manager can be configured to integrate Outlook and voice mail. With this integration, your voice messages will appear in your Outlook inbox. <u>From the Personal Call Manager Compact view:</u> 1. Right-click the ShoreTel icon. A shortcut menu appears. 2. Click the **Configure the ShoreTel System** option. The ShoreTel System dialog box appears. 3. Click the **Outlook** tab. 4. Click the **Use Outlook as my default Voice Mail client** option. 5. Click **OK**. **Note:** Depending on your configuration in the **ShoreTel System/Voice Mail** settings, the ShoreTel system will either ring your telephone or play your voice mail messages through your PC speakers.
Including Outlook Contacts in Your Calling Directory  	You can configure Personal Call Manager to include Outlook contacts when you make calls, conference calls, or transfer calls. **Note:** Once configured, Personal Call Manager displays only the contact folders with the word "Contact" in the folder's name. <u>From the Personal Call Manager Compact view;</u> 1. Right-click the ShoreTel icon. A shortcut menu appears. 2. Click the **Configure ShoreTel System** option. The ShoreTel System dialog box appears. 3. Click the **Outlook** tab. 4. In the Memorize Phone Number Management section, click **Read phone numbers from Outlook on startup** option. 5. Click **OK**.

Task	Step-by-Step Instructions
Displaying Outlook Contact Information for Incoming Calls 	You can display Outlook contact information when you receive or make calls. Contact Information from Outlook will be displayed if the caller is in your Outlook contact list. <u>From the Personal Call Manager Compact view;</u> 1. Right-click the ShoreTel icon. A shortcut menu appears. 2. Click the **Configure ShoreTel System** option. The ShoreTel System dialog box appears. 3. Click the **Outlook** tab. 4. In the Memorize Phone Number Management section, click **Pop Outlook contacts on incoming call** option. 5. Click **OK**.