

SHORETEL USER GUIDE – COMMUNICATOR

Signing In

- Double-click the Communicator icon
- Type in Email or Username
- Enter Password
- Select Remember this and log me in automatically next time
- Click +Show Advanced
- In the Domain name, enter the domain name
- In the Server field, enter the fully qualified domain name
- Click Log in

Tool Bars

Main Menu Toolbar

Drop-down menus contain commands and tasks

Call Toolbar

Process incoming and outgoing calls (to show click View, select show call toolbar)

Active Call Pane

Information about calls in progress:

Presence/Status

Drop-Down menu options to indicate your status/presence and call handling mode



Tabs

- **Voice Mail** – Manage your voice messages
 - Reply, forward, delete, or save messages
 - Right click on a message for more options
- **History** – Incoming and outgoing call log
 - Double click on a call record to call that phone number
 - Add notes to a call record by right clicking the call record and choosing Properties
- **Directory** – Company directory
 - Hover over a name to view status
 - Double click a contact to call
 - Right click for more options

Accessing Voicemail Messages

- Click on the Voicemail Tab
- Select a message
- Click to Play, Reply, Forward, Delete, or Save messages
- Right click on a message for more options

Making a Call

From the Search Bar

- Click the Active Call Pane and begin entering a name or phone number
- All possibilities will populate from your directory

Or

- Click the Dial drop-down, then click Make Call

From the Directory

- Hover over a name to view status
- Double click on a contact to call
- Right click for more options

Answering a Call

- Click

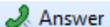
Ending a Call

- Click

Placing a Call on Hold

- While on a call, click  Hold

Ending a Call

- Click  Answer

Parking a Call

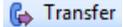
- While on a call, click  Park
- Begin entering a name or phone number
- Click on your choice and click  Park

Retrieving a Parked Call

- Click  Unpark

Transferring a Call

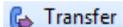
Blind Transfer

- While on a call, click  Transfer
- Begin entering a name or phone number
- Click on your choice and click  Transfer

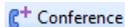
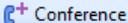
OR, If you have a Professional License

- While on a call, Click and Drag the call to your Contacts Tab
- Drop the call on a contact name to complete the transfer

Voicemail Transfer

- While on a call, click  Transfer
- Begin entering a name or phone number
- Click on your choice and click To Mailbox

Conferencing

- While on a call, click  Conference
- Begin entering a name or phone number
- Click on your choice and click  Conference

Paging

- Click drop down Dial
- Click Overhead Page

Personal Options

- Click drop-down Tools
- Click Options
 - **My Phones** – Provides a list of numbers to configure incoming call routing
 - **Incoming Call Routing** - After selecting a phone, you can specify how incoming calls to that phone are routed
 - **Voicemail** – Voicemail sound options, password and recording
 - **Outlook** – Import contacts and calendar integration
 - **Customization** - options are provided to personalize how the ShoreTel Communicator starts up and looks

Email Integration

- Click drop-down Tools
- Select Options
- Select Voicemail
- Click drop-down box Notification delivery options
- Click Email Wav file
- Confirm your email address
- Click OK

Training Links:

<http://www.loffler.com/support/training/voice-solution-training/shoretel-online-training-materials/>

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