Cisco Computer lab: Room 903

ShoreTel Personal Call Manager
Training Level Draft Outline

ShoreTel Personal Call Manager

Basic Level

1. How do I type a name or number to dial to an extension number or transfer calls using Call Manager?
2. How do I access the Faculty and Staff phone call directory in Call Manager?
3. How do I check a history of incoming and outgoing calls made?
4. How do I send a voice mail message to a recipient or multiple recipients using the directory from Call Manager?
5. How do I configure my Call Handling mode to be set at (Out of the office, In a Meeting, or Extended Absence)?
6. How do I add a phone number to my Speed dial? How do I edit my speed dial list?
7. How do I check my voicemail messages from on or off campus?

Intermediate Level

1. How do I switch my Call Manager to be in detail view or compact view?
2. How do I set incoming calls to be sent to my voicemail?
3. How do I send calls to the Auto Attendant (Main IVC number)?
4. How do I place my Call Manager to be docked at the top or bottom?
5. How do I change my voicemail password?
6. How do I close my Call Manager?

Advanced Level

1. How do I export an employee's contact information into my Microsoft Outlook Account?
2. How can I use my ShoreTel Calendar Form to schedule Call Handling in Microsoft Outlook?
3. How can I create and send a voice mail message using Microsoft Outlook 2007?
4. How can I re-record or remove a voice mail message?
5. How can I schedule a conference call using Call Manager?
6. How can I park a call using Call Manager?

If there is a question that you would like me to address in the **ShoreTel Personal Call Manager** Trainings, please add your questions to this list and forward the word document to my e-mail address larry.valenzuela@imperial.edu, so that I can address them in the trainings.

Thank you for your attention to this request.

Sincerely,

Larry Valenzuela

Technology Center Technician

About VmailFrm

ShoreTel™

ShoreTel 10.2
VmailFrm 15.42.3502.0
United States Patent Numbers 6,996,059, 7,003,091, and 7,167,486.
About VmailFrmShoreTel, Inc. 1998-2010. All Rights Reserved.
This program is protected by US and international copyright laws.

OK
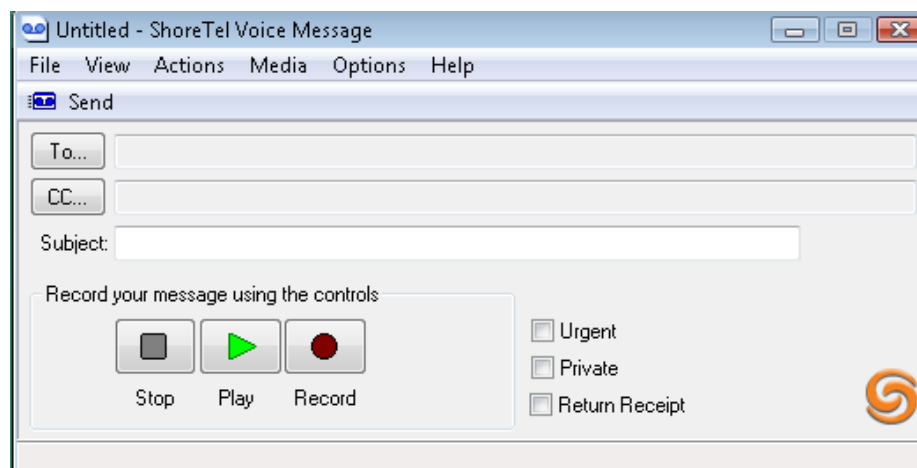
How do I send a new voice message from my Microsoft Outlook account? First, open your Microsoft Outlook account, then on the right hand section of your toolbar, click on **New Voice Message**.

Inbox - Microsoft Outlook

File   Edit   View   Go   Tools   Actions   Help   Adobe PDF

New ▾ | 🖨 📑 ✕ | 📧 Reply 📧 Reply to All 📧 Forward | 📧 📧 | 🖳 Send/Receive ▾ 📧 | 📖 Search address books ▾ | ⓪ 📧 📧

Folder List   «   📧 **Inbox**   New Voice Message
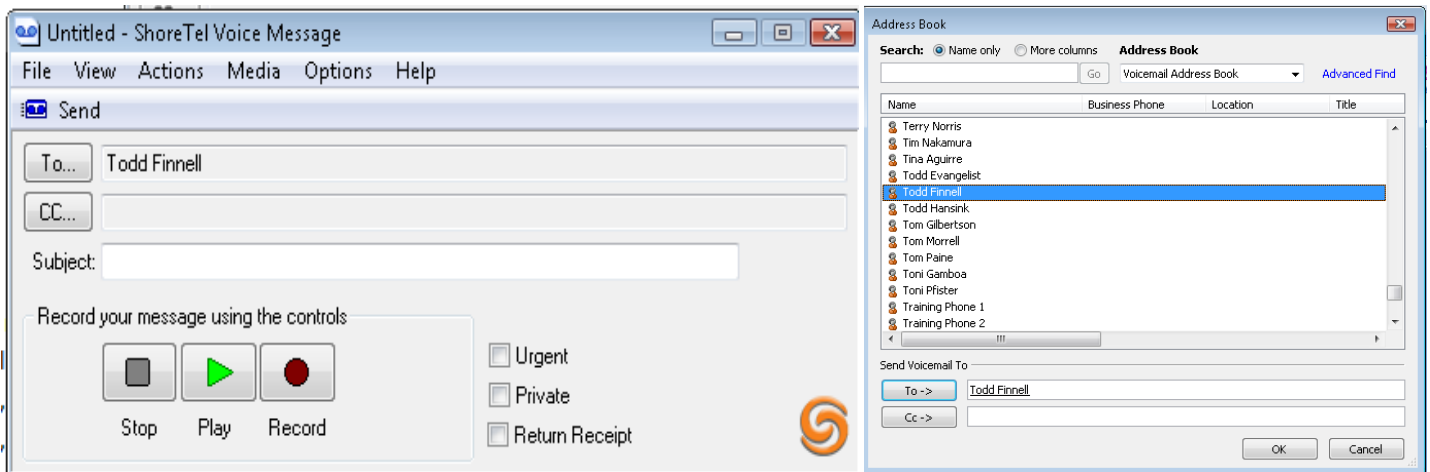
For Example: Voice Mail Message dialog box

Untitled - ShoreTel Voice Message

File   View   Actions   Media   Options   Help

Send

To...
CC...
Subject:

Record your message using the controls

Stop   Play   Record

☐ Urgent
☐ Private
☐ Return Receipt
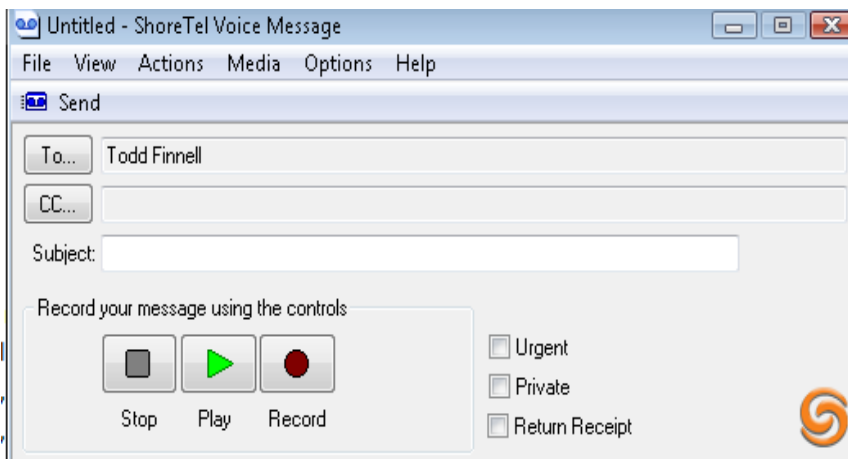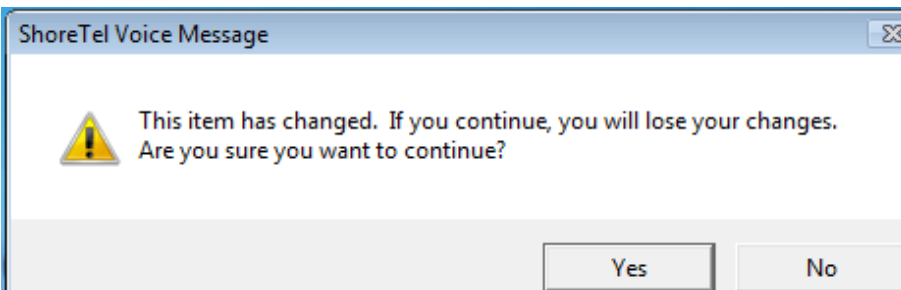
How do I record my voice mail message? Press on the **Record button.** Wait for 2 seconds and your Shortel 230 phone will signal a beep, in which you can begin speaking to record your voice mail message. After you are done with your message, press the **stop button**. To review your message, click the **play button**. If you feel you want to re-record your message, simply click on the **record button** to record your voicemail message again.

How do I add recipients to send the voice mail message to? Click on **To…(button)**, then you will get **Voice Mail Address Book** and then click on the individuals you want to send the voice mail message, and then **click To->(button)** then press **ok.** After you have done this, you can now click on the **Send button**, to send it to your recipient(s).
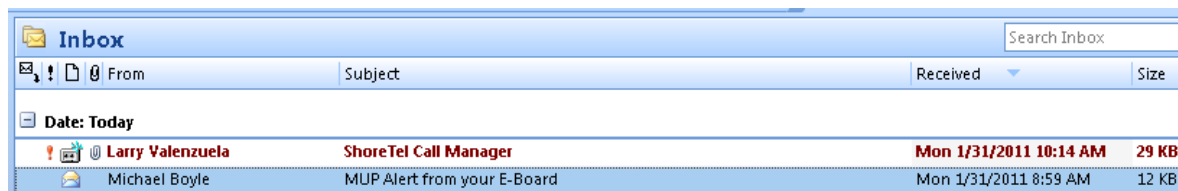
How do I re-record my voice mail message in case I made a mistake? Click on the right hand side (X) to close the dialog box, and then press yes to continue. If the dialog box goes away click on the **Voice Mail Message icon** at the top of your toolbar or press **Control + N** to bring back the **Shortel Call Manager Voice Message dialog box**.
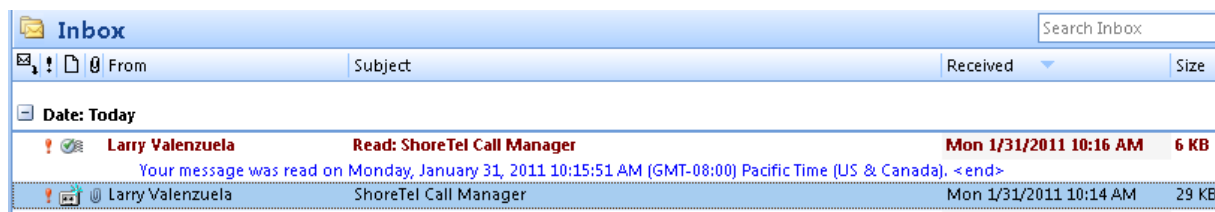
If I check the Urgent or Return Receipt boxes, what happens to my sent voicemail message? If you place a check mark on the **Urgent** (your message will have an exclamation mark that needs your attention).

For example: See below.
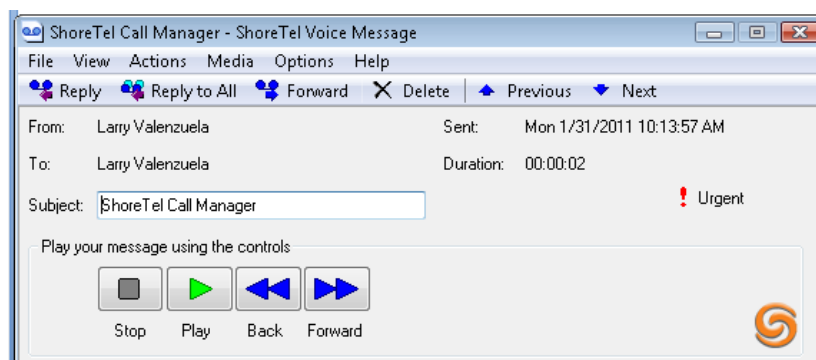
However, if you place a **Return Receipt**, it will request the user to return an e-mail receipt (which will ask the recipient(s) to click yes or no that they read the message).

For example: See below.

How will my voice messages look like when I receive them in my Outlook Calendar? Double click on the voice mail message, below is an example of what you will see.
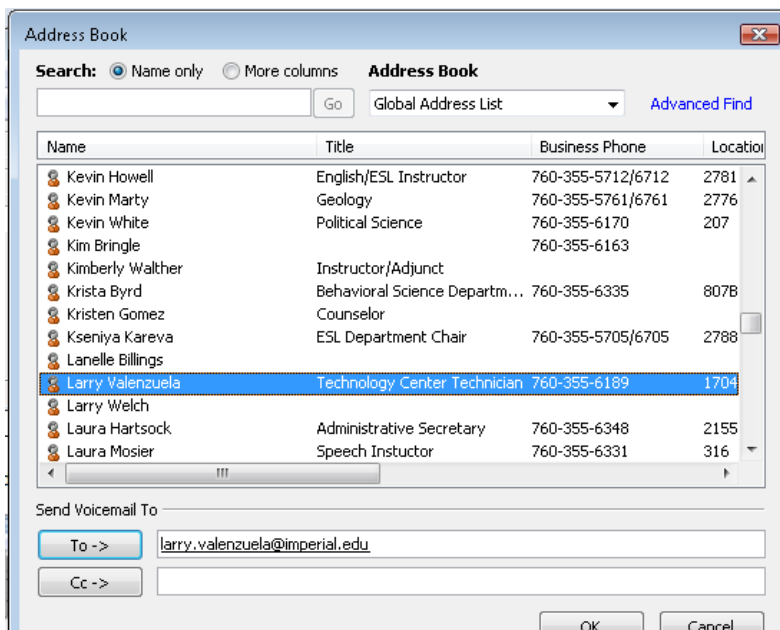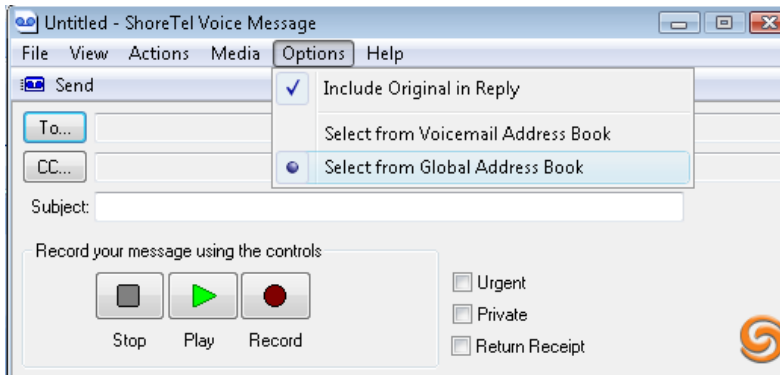

Below is a list of what each button does if you click on it:

Reply	Reply button (replies back to one recipient)
Reply to all	Reply to all button (replies back to more than one recipient)
Forward	Forward button (forwards the voicemail message to recipient(s)
Delete	Delete button (places voice mail message in the deleted items folder
Previous	Previous button (goes back to previous voice mail or e-mail message(s)

Next	**Moves to the next e-mail message**
Stop	**Stop button (stops voice mail recording or voice mail message playing**
Play	**Click Play button to (listen to voice mail messages)**
Back	**Click Back button (play back voice mail messages)**
Forward	**Forward (forward voice mail messages)**

Under Options, make sure you have selected Voicemail Address Book.

Setting up your Shoretel Voicemail Box

Log Into Voicemail
- Press the **Voicemail** key
- Enter the default password **1234** followed by **#**

You will hear the new user tutorial and be prompted to change to your password with a minimum of **4** digits and a maximum of **25**

Create a New Password
- Enter your **new password** followed by **#**
- You must **re-enter your new password** followed by **#**

You will be asked to record your name; this is for the company directory.

Record Your Name
- Record your **name** and press **#** when finished.
- Press **#** to Confirm Recording

Record Your Personal Greeting
- Press **7** for Mailbox Options
- Press **1** to record a personal greeting and **#** when finished
- Press **#** to confirm the recording, **1** to review, **2** to re-record or ***** to cancel

Your mailbox is now initialized

Checking Messages from Off Site dial 760-352-8320
- As soon as the greeting begins dial **#**
- Enter your **extension number**
- Enter your **password** followed by **#**

The Mailbox Main Menu:
1 = Listen to Messages
2 = Send a Message
3 = Listen to Saved Messages
7 = Change Mailbox Options
9 = Return to Auto Attendant
# = Hear Mailbox Status

To log into voicemail from another Shoretel phone:
- Press the **Voicemail** key
- When you hear the prompt press **#**
- Enter your **extension number**
- Enter your password (default password is **1234)** followed by **#**

To Reassign your extension:
- Go to the phone you wish to assign your extension to
- Press either **##** or **voicemail #**
- Enter your **extension number**
- Enter your **password** followed by **#**
- Press **7 3 1** to assign your extension to that phone

To Unassign your extension:

Setting up your Shoretel Voicemail Box

- Log into your voicemail box either from any phone in the office or by dialing the backline to voicemail
- Press **7 3 2** to send your extension back to your desk

Recording Personal Greetings:

You can record a different greeting for each of your five call handling modes. If you do not record a personal greeting the caller will hear the default system greeting. The default greeting inserts your name recording and then states that you are either in a meeting, out of the office, or not available depending on which mode you have your phone in.

See example below for default in a meeting greeting.

"You call is being forwarded to a Shoretel voicemail system Bob Smith is in a meeting. Please leave a message at the tone…"

To record a greeting for each mode
1. First put your phone in the mode that you wish to record
2. Then log into voicemail
3. Press **7** for mailbox options
4. Press **1** to record greeting
5. Follow the prompts to save
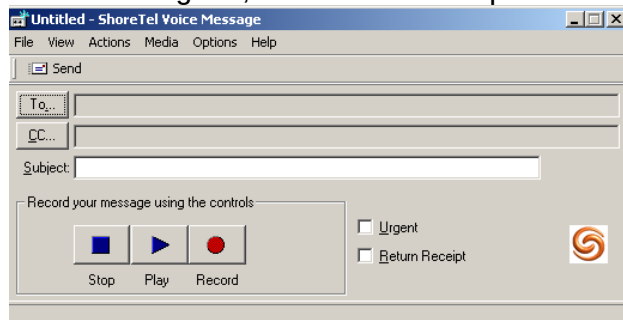
If you are out of the office and have forgotten to change your greeting
1. Dial into voicemail
2. Press **7** for mailbox options
3. Press **2** to change call handling mode
4. Press **1** to record a personal greeting (this will now record the greeting for whatever mode you just put your phone into)
5. Follow prompts and save your new greeting

Miscellaneous Voicemail Tips:

- Press **#** to skip directly to the beep in a Shoretel Voicemail box
- Press **9** to return to the Auto Attendant from a Shoretel Voicemail box
- To send a message to another user in your system;
  - From your phone log into voicemail and press **2** To Send a message
  - From Outlook click on the tape icon a window box will pop up (see below) and allow you to address the message, type a subject, mark urgent, set return receipt and record your message.
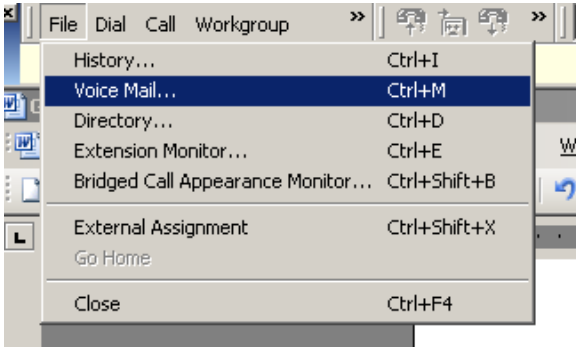
To Check Messages via Outlook

Setting up your Shoretel Voicemail Box

- Voicemail messages will also be delivered to your PC via Outlook
- Access your Outlook Inbox by either opening Outlook as you normally would *or* from your Personal Call Manager Select **File** and **Voicemail** *See below*
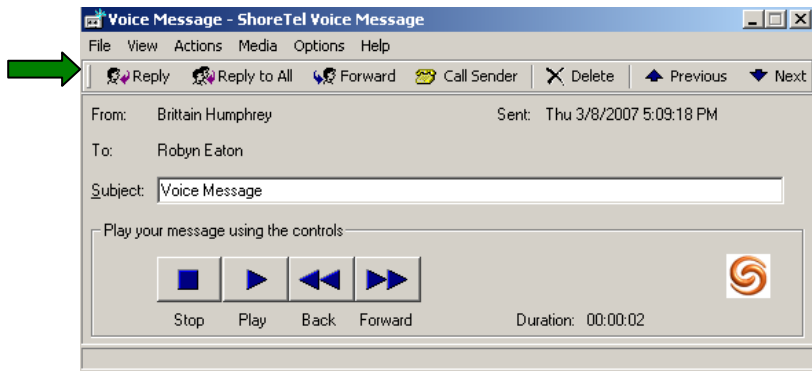
- Voice Messages will be labeled as such and have a tape icon to the left of their names (*see example below*)

- When you see a message that you would like to listen to simply double click on the message and the following window will appear

- Click the Play, Stop, Back or Forward Buttons to maneuver through the message.
- Reply, Call Sender, Delete or Forward the message using the action buttons at the top of the pop up window
- Messages can be forwarded in the same way that you would forward an email

Setting up your Shoretel Voicemail Box

By default when you open a voicemail via Outlook and click on the "To" tab you will be able to select only from your internal companies email addresses. If you wish to forward voicemails off site to users outside of your company and you want to access their addresses from Outlook Contacts you must go into Options and then click on Select from Global Address Book.

Note; any voicemails forwarded off site will be converted to a wav file.

After changing this Option when you click on the "To" Tab you will now have the ability to use the drop down and select your Contacts.