

# Personalizing Call Handling

Personalizing call handling allows you to create personal rules that further define call routing.

You can also modify and delete personal rules.



## Note

You must have the appropriate license to personalize call handling.

## Creating a personal rule

1. From the Options and Preferences window, click **Personalized Call Handling**.

The Personalized Call Handling page is displayed.

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2. Click **New Rule**.

From the Personalized Call Handling Setup dialog box, select the condition(s) for the rule, then click **Next**. These conditions are

- **Phone number match**: Matches the caller ID with a parameter(s), which is specified by clicking on **Phone Number Match** in the **Condition Description** field and using the Phone Number Match dialog box.

To specify a parameter to match the caller ID, from the **Match Type** drop-down list choose the parameter, enter the number in the associated field, and then click **OK**. Click **Add** or **Delete** to add or delete parameters to the condition.

The parameters are:

- **Specific Number**. The number that must match the caller ID; numbers can be an internal extension or a phone number external to the system.
  - **Every internal number**. Matches all calls originating from a device within the ShoreTel network.
  - **Any internal extension starting with**. The digits that must match the initial digits of numbers originating from internal callers.
  - **Every external number**. Matches all calls originating from a device not located within the ShoreTel network.
  - **Any external extension starting with**. The digits that must match the initial digits of numbers originating from outside the system.
  - **Off system extension**. The off system extension that must match the caller ID.
  - **Private**. Matches all calls that are identified by caller ID as private.
  - **Out of Area / Unknown**. Matches all calls that caller ID identifies as out of area or unknown.
- **I am on the phone**. This condition is satisfied when your phone is busy.

- Call Handling Mode. Matches your active call handling mode with a mode, which is specified by clicking on **Call Handling Mode** in the **Condition Description** field and using the resulting dialog box.
- Time of day. This condition is satisfied when a call is received during the a time range, which is specified by clicking on **Time of Day** in the **Condition Description** field and using the resulting dialog box. The actual time is based on your the time zone.
- Day of week. This condition is satisfied when a call is received on a day, which is specified by clicking on **Day of Week** in the **Condition Description** field and using the resulting dialog box. The day is based on your the time zone.
- DNIS Match. Matches the DNIS of an inbound call with a parameter(s), which is specified by clicking on **DNIS Match** in the **Condition Description** field and using the **Set dialed number string** dialog box to enter the string.

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3. Select the action for the rule, which is the resolution for a call that matches the specified condition, and then click **Next**. These actions are:

- Forward Call to Specific Number. Routes the call to a number, which is specified by clicking on **Forward Call to Specific Number** in the **Action Description** field and using the Forward Call dialog box to choose either **Specific Number** or **Off System Extension** and then enter the number.
- Forward Call to Voice Mail. Routes the call to your voice mail.
- Forward Call to Auto Find Me. Routes the call to your voice mail, and then to your Find Me number.
- Forward Call to Announced Find Me. Routes the call to your voice mail, and then to your Find Me number; the caller's name is played before you answer the call.
- Play Ringtone. The phone plays a ringtone, which is specified by clicking on **Play Ring Tone** in the **Action Description** field and using the Select ring tone dialog box.

This action is only available for ShoreTel phones that support multiple ringtones.

4. Enter a name for this rule, and click **Finish**.

The rule is displayed in the Personalized Call Handling dialog box. The rule is enabled by default.

5. Use the Personalized Call Handling dialog box to change whether a rule is enabled and to reorder the list of rules. ShoreTel enacts the rules in the order displayed here.

6. Click **OK**.

### Modifying a personal rule

1. From the Options and Preferences window, click **Personalized Call Handling**.
2. Using the Personalized Call Handling page, select the rule you want to modify and click **Modify Rule**.

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3. Follow steps 3-6 in [Creating a personal rule](#) on page 86.

### **Deleting a personal rule**

1. From the Options and Preferences window, click **Personalized Call Handling**.
2. Using the Personalized Call Handling page, select the rule you want to delete, and click **Delete Rule**.

The rule is deleted from the list.

3. Click **OK**.

## **Specifying Voice Mail Options**

Using voice mail options, you can specify how your voice mail is recorded and played, delivered, and escalated. In addition, you can record a new message and change your voice mail password.