



ShoreTel IP Phone 420/420g User Guide

September 2016

Document and Software Copyrights

Copyright © 1998-2016 by ShoreTel Inc., Sunnyvale, California, USA. All rights reserved.

Printed in the United States of America. Contents of this publication may not be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without prior written authorization of ShoreTel, Inc. ShoreTel, Inc. reserves the right to make changes without notice to the specifications and materials contained herein and shall not be responsible for any damage (including consequential) caused by reliance on the materials presented, including, but not limited to typographical, arithmetic or listing errors.

Trademarks

ShoreTel, ShoreTel (and logo), Brilliantly Simple, Brilliantly Simple Communication, ShoreTel Connect, ShoreTel Connect ONSITE, ShoreTel Connect CLOUD, and ShoreTel Connect HYBRID are registered trademarks of ShoreTel, Inc. in the United States and/or other countries. The ShoreTel logo is a trademark of ShoreTel, Inc. in the United States and/or other countries.

All other copyrights and trademarks herein are the property of their respective owners.

Patents

The ShoreTel IP Phone 420/420g is covered by patents as listed at <http://www.shoretel.com/about/patents.html>.

Version Information

ShoreTel IP Phone 420/420g User Guide

Document Part Number: 800-1760-02

Date: September 2016

Company Information

ShoreTel, Inc.

960 Stewart Drive

Sunnyvale, California 94085 USA

+1.408.331.3300

+1.408.331.3333 (fax)

www.shoretel.com

Table of Contents

Before You Start	3
About This Book	4
Organization	4
Conventions	4
Related Documents	4
Chapter 1 Getting Started	5
Overview of the ShoreTel IP Phone 420/420g	7
Call Appearance Buttons	8
Reducing Glare on the Phone's Screen	8
Adjusting the Display Contrast	8
Assigning Your Extension to Your Phone	9
Provisioning a Phone in a ShoreTel Connect CLOUD System	9
Logging in to the Voicemail System and Setting up Your Phone	10
Changing Your Phone's Time Zone	10
Operating Your Phone	11
Placing Calls	11
Answering Calls	12
Adjusting the Ring and Listening Volume	14
Muting a Call	14
Guide to Status Icons	14
Using the Directory	15
Checking Call History	16
Interacting with Calls	17
Placing a Call on Hold or off Hold	17
Diverting an Incoming Call to Voicemail or Another Number	18
Transferring a Call	18
Answering Additional Calls	19
Parking and Unparking Calls	19
Setting User Options	20
Chapter 2 Using Advanced Features	21
Making a Conference Call	22
Using the Intercom	22
Changing Availability State and Forwarding	23
Changing a Phone's Extension Assignment	24

Paging 24
 Picking up the Night Bell 25
 Changing a Hunt Group’s Status 25
 Silently Monitoring a Call 25
 Silently Coaching in a Call 26
 Barging in on a Call 26

Chapter 3 Using Voicemail 27

Logging in to Voicemail 29
 Logging in to Voicemail from Your Phone 29
 Logging in to Voicemail from Another Extension 29
 Logging in to Voicemail from an External Phone 29
 Interacting with New Messages 30
 Using Shortcut Keys 30
 Listening to, Replaying, Saving, and Deleting Messages 30
 Forwarding a Message 30
 Replying to a Message 31
 Listening to Saved Messages 31
 Sending Messages from Voicemail 31
 Leaving a Message and Using Message Options 32
 Using Mailbox Options 33
 Recording Your Name 33
 Recording a Personal Greeting 33
 Setting Your Password 34
 Assigning Your Extension to a Phone 34
 Changing Your Availability State 34
 Enabling or Disabling Envelope Information 35
 Listening to Your Deleted Messages 35
 Removing Deleted Messages 35
 Enabling or Disabling Automated Call Handling in Outlook 36
 Enabling or Disabling a Notification Profile 36
 Changing the Workgroup Agent State 36
 Enabling or Disabling Find Me Forwarding 37

Chapter 4 Troubleshooting 38

Problems and Solutions 39
 Viewing Phone Information 39
 Rebooting Your Phone 40

Before You Start

The following sections provide an overview of the book:

- About This Book 4
- Organization 4
- Conventions 4
- Related Documents 4

About This Book

This book is intended for those who use the ShoreTel IP Phone 420/420g in a ShoreTel Connect CLOUD or ShoreTel Connect ONSITE system. It describes the phone's features and how to use them.

Organization

This document is divided into the following chapters:

- Chapter 1, [Getting Started](#) on page 5, provides an overview of the phone and describes how to set up the phone and use it for common tasks.
- Chapter 2, [Using Advanced Features](#) on page 21, describes how to use the phone to perform advanced tasks, such as customizing the phone, making calls involving multiple parties, or using functions that require special key combinations.
- Chapter 3, [Using Voicemail](#) on page 27, describes how to use the voicemail system to listen to messages and perform other tasks related to your voice mailbox.
- Chapter 4, [Troubleshooting](#) on page 38, provides information about simple approaches to addressing issues with your phone.

Conventions

The following typographical conventions are used in this document:

Font	Description
Bold	Keys that you press on the phone
Blue	Cross references with hyperlinks. Click the blue text to go to the indicated section. All chapters have a list of section links on the first page. Note: Table of Contents entries are also links, but they are not blue.

Related Documents

The following documents are also available:

- *Quick Reference* provides shortcuts for performing common tasks with the phone.
- *Quick Install Guide* describes the ports on the back of the phone and how to adjust the tilt angle of the phone when it is used on a desk. For international audiences, the *Safe Installation Guide* provides the same information through illustrations.
- *IP420 Wall Mount Safe Installation Guide* describes how to mount the phone on a wall. *400-Series IP Phone Wall Plate Mount Safe Installation Guide* describes how to mount the phone on a wall plate.

CHAPTER

1

Getting Started

This chapter provides an introduction to the ShoreTel IP Phone 420/420g. It contains the following information:

Overview of the ShoreTel IP Phone 420/420g	7
Call Appearance Buttons	8
Reducing Glare on the Phone's Screen	8
Adjusting the Display Contrast	8
Assigning Your Extension to Your Phone	9
Provisioning a Phone in a ShoreTel Connect CLOUD System	9
Logging in to the Voicemail System and Setting up Your Phone	10
Changing Your Phone's Time Zone	10
Operating Your Phone	11
Placing Calls	11
Answering Calls	12
Adjusting the Ring and Listening Volume	14
Muting a Call	14
Guide to Status Icons	14
Using the Directory	15
Checking Call History	16
Interacting with Calls	17
Placing a Call on Hold or off Hold	17
Diverting an Incoming Call to Voicemail or Another Number	18
Transferring a Call	18
Answering Additional Calls	19
Parking and Unparking Calls	19

Setting User Options	20
----------------------------	----

Overview of the ShoreTel IP Phone 420/420g

Welcome to your ShoreTel™ IP phone!

Figure 1 provides an overview of the IP420/IP420g phone components.

The IP420 includes a 10/100 Ethernet switch. The IP420g includes a 10/100/1000 Ethernet switch for Gigabit speed.

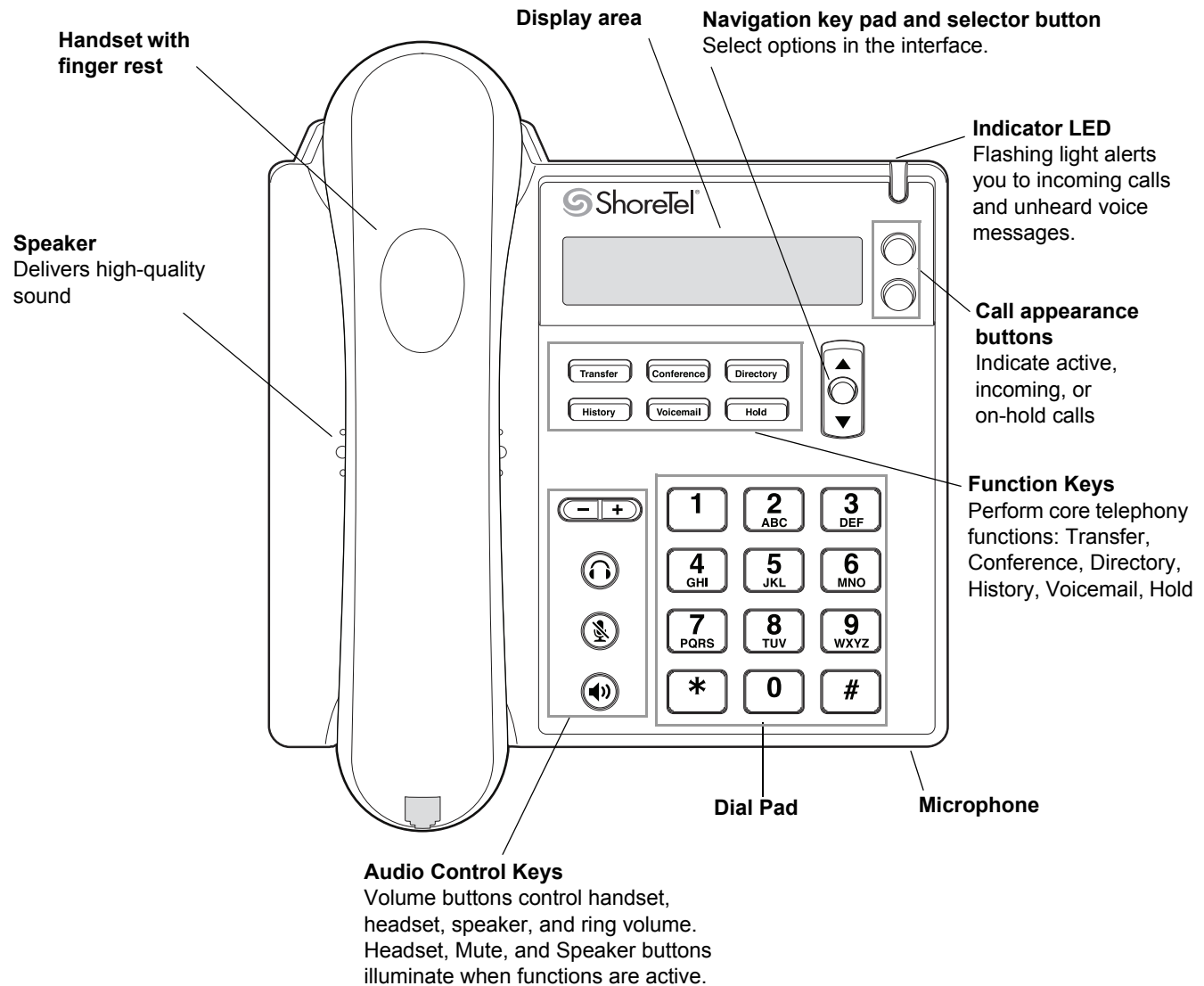


Figure 1: ShoreTel IP Phone 420/420g Components

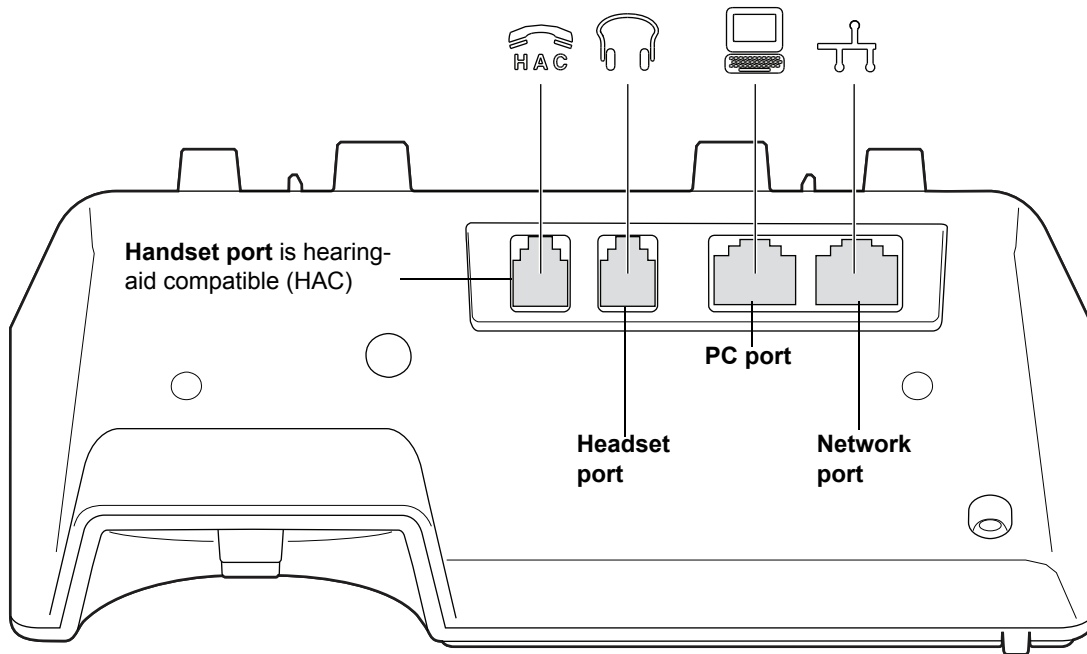


Figure 2: Ports on the Back of the IP Phone 420/420g


Call Appearance Buttons

Your phone features two call appearance buttons that show incoming, active, or held calls. You cannot program these buttons for other functions.

Reducing Glare on the Phone's Screen

If glare makes it difficult to see your phone's display screen, you can adjust the tilt angle of the stand on the back of your phone. Detailed instructions are provided in the *Safe Installation Guide* packaged with your phone.

Adjusting the Display Contrast

1. With the phone on hook, press and hold the  button.

The LED should *not* light and you shouldn't hear any tones; if this isn't the case, lift and replace the handset.

2. Press the ▲ or ▼ key on the navigation key pad to increase or decrease contrast.

Assigning Your Extension to Your Phone

The procedure you use to assign your extension to your phone depends on what your phone displays, as follows:

- If your phone displays your name and extension, your ShoreTel Connect administrator or authorized contact has already assigned your phone to you, and you do not need to assign your extension to your phone. However, you do need to log in to change your password and record your name, as described in steps 1-6 in [Logging in to the Voicemail System and Setting up Your Phone](#) on page 10.
- If your phone displays **Available** and the date and time, follow the instructions in [Logging in to the Voicemail System and Setting up Your Phone](#) on page 10.
- If your phone displays **DID**, follow the instructions in [Provisioning a Phone in a ShoreTel Connect CLOUD System](#) on page 9 and then follow the instructions in [Logging in to the Voicemail System and Setting up Your Phone](#) on page 10.

Until your phone is assigned, you can place internal calls by dialing a number or using the Directory, but you cannot receive calls and you probably cannot place external calls. To receive calls and place external calls, you need to log in to the voicemail system and assign your extension to the phone.

When your extension is assigned to the phone, your phone displays your name, your extension, and the date and time. In this state, your phone can receive calls and you can check for new messages.

With the appropriate permissions (set by your ShoreTel Connect administrator), you can log in to any ShoreTel IP phone in the ShoreTel Connect system to assign your extension to that phone. See [Changing a Phone's Extension Assignment](#) on page 24 for more information.

Provisioning a Phone in a ShoreTel Connect CLOUD System

When a phone is first added to a ShoreTel Connect CLOUD system, you must first register the phone with the system. If the phone displays **DID**, it indicates that it has not been registered with the system. To register the phone, use this procedure:

1. Connect the phone to the network.

The phone briefly displays "Cloud credentials" and then the **DID** prompt.

2. At the **DID** prompt, enter the country code plus the area code and telephone number (for example, 1512555555) that your ShoreTel Connect CLOUD authorized contact provided, and then press #.

The phone displays the **Password** prompt.

3. At the **Password** prompt, enter the phone PIN that your ShoreTel Connect CLOUD authorized contact provided, and then press #.

The phone displays **Available**.

4. Proceed with the instructions provided in [Logging in to the Voicemail System and Setting up Your Phone](#) on page 10.

Logging in to the Voicemail System and Setting up Your Phone

To log in and assign your extension to your phone:

1. Press the **Voicemail** button.
2. Enter the extension number assigned to you by your system administrator.
3. Enter the password provided by your ShoreTel Connect administrator or authorized contact and press **#**.
4. If prompted, enter a new password followed by **#**.



Tip

Your password must be at least six numbers in length.

5. If prompted, to confirm your new password enter it again and press **#**.
6. When prompted, record your name and press **#**, and then choose one of the following options:
 - To accept the recording, press **#**.
 - To review the recording, press **1**.
 - To record your name again, press **2**.
 - To cancel the recording, press *****.
7. To assign your extension to this phone, press **7** for Mailbox Options.
8. Press **3** to reassign your extension.
9. Press **1** to assign your extension to the phone.

Your extension is now assigned to your phone, and your phone displays your name and extension.

Changing Your Phone's Time Zone

If the default time zone setting for your phone differs from your location's time zone, you can change your phone's time zone so that it displays the time for your location.

1. Press the navigation selector button.
2. At the **VM password** prompt, enter your voicemail password followed by **#**.

The phone's current time zone is displayed.

3. Press the navigation selector button.

After a brief display of key pad shortcuts (***** for Cancel and **#** for OK), a list of time zones is displayed in edit mode; the current time zone setting is highlighted and includes a check mark.

4. Use the ▲ and ▼ navigation keys to scroll to the time zone that you want to select.
5. With the desired time zone highlighted, press the navigation selector button.
The selected time zone is displayed.
6. Press ▼ navigation key once.
Exit is displayed.
7. Press the navigation selector button.
Your phone displays the current time for the time zone you selected.

Operating Your Phone

This section provides an overview of the following basic phone tasks:

- Placing calls
- Answering calls
- Sending an incoming call to voicemail
- Adjusting the ring and listening volume
- Muting a call
- Answering call waiting


Placing Calls

To place a call, you can use the handset, the speakerphone, or a headset.

Using the Handset to Place a Call


1. To place a call, pick up the handset and dial a phone number.
2. To end the call, hang up the handset.

Using the Speakerphone to Place a Call


1. To place a call using the speakerphone, press the  button and dial a phone number.

The LED in the  button lights green, and the call is dialed.


2. To end the call, press the  button again.


The  button is no longer illuminated.

Using the Headset to Place a Call

1. To place a call using the headset, do one of the following:
 - If you use a wired headset, press the  button.
 - If you use a wireless headset, go off-hook with your headset.

The LED in the  button lights green, and the call is dialed.

2. To end the call, do one of the following:
 - If you use a wired headset, press the  button again.
 - If you use a wireless headset, put your headset into the on-hook position.

The  button is no longer illuminated.

Answering Calls

Ring tones, a green blinking call appearance button, and the flashing red light in the top right corner of your phone indicate an incoming call. If the information is available, the caller's name and number appear on your display.

To answer a call, you can use the handset, the speakerphone, or a headset. Depending on how you set your automatic off-hook preference in the ShoreTel Connect client or how your administrator set this option in ShoreTel Connect Director, you can also answer a call through your speakerphone or headset using either of the following methods:


- Press a blinking green call appearance button.
- If the call is shown in the display area, press the selector button on the navigation key pad.

If you receive one or more inbound calls while two calls are already active, incoming, or on hold, the display area shows an arrow to indicate additional calls. Use the navigation key pad to scroll through the calls and see caller ID information for each call. Press the selector button on the navigation key pad to answer the call that is shown on the display.

Using the Handset to Answer a Call


1. To answer a call, pick up the handset when the phone rings.
2. To end a call, hang up the handset.

Using the Speakerphone to Answer a Call

1. To answer a call, do one of the following:
 - Press the  button.
 - If your automatic off-hook preference is configured to use the speaker, press the blinking green call appearance button.


The LED in the  button lights green.

2. To end the call, press the  button again.

The  button is no longer illuminated.


Using a Headset to Answer a Call


If you plan to use a headset to answer calls, use the ShoreTel Connect client to designate your wireless or wired regular headset as your default auto off-hook preference.

1. To answer a call using the headset, do one of the following:
 - If you use a wired headset, press the  button.
 - If you use a wireless headset, go off-hook with your headset.
 - If your automatic off-hook preference is configured to use your headset, press the blinking green call appearance button. (If you use a wireless headset, the phone then displays a message prompting you to press the off-hook button on your headset.)

The LED in the  button lights green.



2. To end the call, do one of the following:

- If you use a wired headset, press the  button again.
- If you use a wireless headset, put your headset into the on-hook position.

The  button is no longer illuminated.

Adjusting the Ring and Listening Volume

To adjust the volume on your phone, use the  buttons.

- Adjust the volume of your phone's ringer while the phone is on hook.
- Adjust the handset listening volume while the handset is off hook.
- Adjust the speakerphone volume when the  button's LED is illuminated.
- Adjust the headset listening volume when the  button's LED is illuminated.




Note

When using a wireless headset, you should tune your wireless headset according to the manufacturer's instructions if you experience any of the following audio problems:

- You cannot hear a dial tone.
- The volume for you or the other party is not loud enough.
- You hear a buzzing or hissing sound.

Muting a Call

- To mute a call so that the caller doesn't hear you, press the  button.

The LED on the  button is illuminated in red when the mute is active.

- To unmute a call so that the caller can hear you, press  again.

The  button is not illuminated when the mute is not active.

Guide to Status Icons

Your ShoreTel IP Phone 420/420g displays icons for phone status and calls placed or received. These icons are shown in [Table 1](#).

Table 1: Status Icons











Icon	Description
	Off-screen inbound call (on main screen)
	Voicemail message indicator (on main screen)

Table 1: Status Icons (Continued)

Icon	Description
	Secure call (on main screen)
	Workgroup Agent logged in (on main screen)
	Workgroup Agent logged out (on main screen)
	Workgroup Agent wrap up (on main screen)
	Missed call (on main screen and in History)
	Inbound call (in History)
	Outbound call (in History)
	Transferred call (in History)

Using the Directory

You can use the Directory to quickly look up and dial a person's extension.

1. Press the **Directory** button.



Tip

To close the directory, press the **Directory** button.

2. Locate the name of the person you want to call using one of the following methods:
 - Use the ▲ and ▼ navigation keys to scroll through the directory list until the name of the person you want to call is highlighted.
 - Dial the numbers that correspond with the first few letters in the person's first or last name, and scroll through this filtered list until the name of the person you want to call is highlighted.



Tips

- You can also search by both first and last name at the same time. After entering the first two or three digits for the first or last name, press # to enter the first two digits for the other name (first or last). For example, to find the entry for Steve Williams or William Stephens dial 78#94.
 - To delete the filter and return to the full directory list, scroll to the **Clear filter** entry at the top of the list and press the selector button on the navigation keypad. If you mistakenly dial the wrong digit or digits, you can quickly display the **Clear filter** option by entering several additional digits. (When the system cannot find a match for the digits you enter, only the **Clear filter** option remains on the phone display.)
-

3. With the person's name highlighted, dial the person's number using one of the following methods:
 - Press the selector button on the navigation keypad.
 - Press a call appearance button.
 - Pick up the handset.
 - Press the speaker button.
 - Press the headset button. (If you use a wireless headset, the phone then displays a message prompting you to press the off-hook button on your headset.)

Checking Call History

The History viewer displays recent inbound and outbound calls, with the most recent call listed first. Each entry in the History list displays the caller's name or number (if available) and the time or date of the call. If no caller ID information is available for a particular number, the phone displays "Unknown."

To view the list of all calls placed, received, and missed:

1. Press the **History** button.



Tip

To close the History viewer, press the **History** button.

2. Use the ▲ and ▼ navigation keys to scroll through and review the list of calls placed, received, or missed.

To place a call using the History viewer:

1. Press the **History** button.



Tip

To dial your most recent outbound call, press and hold the **History** button.

Note that if you used *67 on your last outbound call these digits will not be included if you redial that outbound call by pressing and holding the **History** button.

2. Use the ▲ and ▼ navigation keys to scroll through the History list until the name of the person you want to call is highlighted.
3. With the name of the person you want to call highlighted, choose one of the following options to dial the call:
 - Press the selector button on the navigation keypad.
 - Press a call appearance button.
 - Pick up the handset.
 - Press the speaker button.
 - Press the headset button. (If you use a wireless headset, the phone then displays a message prompting you to press the off-hook button on your headset.)

Interacting with Calls

This section describes the following ways to interact with calls:

- Placing a call on hold or off hold
- Diverting an incoming call to voicemail or another number
- Transferring a call
- Answering additional calls
- Parking and unparking calls

Placing a Call on Hold or off Hold

To place a call on hold:

- While on an active call, do either of the following:
 - Press the **Hold** button.
 - Press the green call appearance button for the active call.

The call appearance button for the held call blinks green.

To take a call off hold:

1. Scroll through the held calls by using the ▲ and ▼ navigation keys until the call you want to take off hold is displayed.
2. Do either of the following:
 - Press the **Hold** button.
 - Press the blinking green call appearance button.

The call is taken off hold, and the call appearance button associated with the call illuminates in steady green.

If your phone is on hook while a call is on hold, you hear a reminder ring in 10 seconds and then at one-minute intervals while any call remains on hold.

Diverting an Incoming Call to Voicemail or Another Number

Whether your phone is idle or you are engaged in a call, you can send an incoming call to your voice mailbox or to another number without answering it.

To send an incoming call to voicemail:

- While the incoming call is displayed, do one of the following:
 - Press the **Voicemail** button.
 - Press **#**.

To transfer an incoming call to another number without answering the call:

1. While the phone rings, press the **Transfer** button.
2. Enter the number you want to transfer the call to.

The call is transferred to the designated number.

Transferring a Call

You can transfer a call in two ways:

- A blind transfer lets you transfer the call without the other party answering the call.
- A consultative transfer lets you talk to the other party before completing the transfer.

To do a blind transfer:

1. While engaged in a call, press the **Transfer** button.
2. Dial the number you want to transfer the call to.



Tip

If you want to cancel the transfer, take the original call off hold.

3. Do one of the following:
 - Press the **Transfer** button.
 - Hang up.

The call is transferred to the designated number.

To do a consultative transfer:

1. While engaged in a call, press the **Transfer** button.
2. Dial the number you want to transfer the call to.

**Tip**

If you want to cancel the transfer before the other party answers the call, take the original call off hold.

3. After the other party answers the call, do one of the following:
 - To complete the transfer, use one of the following methods:
 - Press the **Transfer** button.
 - Use the navigation key pad to highlight **Complete transfer**, and then press the selector button.The call is transferred.
 - To cancel the transfer, use the navigation key pad to highlight **Cancel**, and then press the selector button.The transfer is canceled, and the original call remains connected.

Answering Additional Calls

With the appropriate permissions (set by your ShoreTel Connect administrator), you can receive up to 16 incoming calls at once.

When you receive an incoming call while you are on another call, you hear a beep on the call, the call appearance button blinks green, and your phone displays the caller ID information for the incoming call. For three or more calls, a downward arrow on the display screen indicates that other incoming, active, or on-hold calls are off screen. When you end a call that is displayed on screen, another call moves up to occupy that call appearance button.

You can interact with calls as follows:

- To answer an incoming call and put the current call on hold, press the green blinking call appearance button.
- If you have multiple incoming, active, or on-hold calls, use the ▲ and ▼ navigation keys to scroll through the list of calls to locate the call you want to answer or return to. While the call is displayed on screen, do one of the following:
 - To answer the call, press the selector button on the navigation key pad.
 - To put the call on hold or take it off hold, press the **Hold** button.

Parking and Unparking Calls

With the appropriate permissions (set by your ShoreTel Connect administrator), you can park a connected call on another extension.

1. While the call is active, press the **Hold** button to put the call on hold.
2. Dial ***11** followed by the extension number where you want to park the call.

To unpark the call from a different location, dial *12 followed by the extension number.



Note

If the call is not answered on the parked phone within a certain amount of time (as configured by your ShoreTel Connect administrator), the call returns to the original extension. The default is 60 seconds.

Setting User Options

You can change options such as ring tone and call routing through the ShoreTel Connect client or the ShoreTel Connect CLOUD portal. For details, see your ShoreTel Connect client documentation or the portal articles on the ShoreTel Support website.

CHAPTER

2

Using Advanced Features

This chapter provides instructions for using the advanced features of the ShoreTel IP Phone 420/420g. It contains the following information:

Making a Conference Call	22
Using the Intercom	22
Changing Availability State and Forwarding	23
Changing a Phone's Extension Assignment	24
Picking up the Night Bell	25
Changing a Hunt Group's Status	25
Silently Monitoring a Call	25
Silently Coaching in a Call	26

Making a Conference Call

A conference call involves more than two parties connected in a call. The number of people you can conference together in a call using your **Conference** button depends on your system configuration. Contact your ShoreTel Connect administrator for the details about your system's conference capabilities.

To make a conference call:

1. Dial the extension of the first person you would like to include in the conference call, and consult with that person.
2. Press the **Conference** button.

The call is put on hold.



Tip

If you want to cancel the conference at this point, press the **Hold** button to take the original call off hold.

3. At the Dial prompt, dial the extension of the next person you would like to add to the conference call.
4. Do one of the following:
 - Press the **Conference** button, which starts the conference as soon as the person answers.
 - Wait for the person to answer, consult with that person if necessary, and then proceed with next step.
5. Do one of the following:
 - To proceed with the conference, use the navigation key pad to highlight **Complete conference**, and then press the selector button.

A three-way conference call is established. Your phone displays the number of other participants included in the conference call.
 - To cancel the conference, use the navigation key pad to highlight **Cancel**, and then press the selector button.

The conference is canceled, and the original call remains connected.
6. Repeat steps 1-5 for each additional person you want to include in the conference call.

Using the Intercom

The Intercom function allows you to connect with another person without waiting for that person to answer the phone. To use this feature, you and the other person must use ShoreTel IP phones and have the necessary permissions.

To use the intercom to contact another party:

1. Lift the handset.
2. Dial * 15 followed by the extension number of the person you want to contact.



Note

If the person is already on a call when you contact them through the intercom, the call is treated like a regular incoming call.

Changing Availability State and Forwarding

You can set six distinct availability states for your extension. These availability states can be configured with various options to forward incoming calls to another number or send them to voicemail. Using the voicemail system, you can also record a different personal greeting for each availability state. To configure options for the various availability states, use the ShoreTel Connect client.

The availability states are as follows:

- Available (the default) allows you to answer all incoming calls.
- In a Meeting
- Out of Office
- Vacation
- Custom
- Do not disturb

You can change your active availability state using the ShoreTel Connect client or the voicemail system.

To change your active availability state through the voicemail system:

1. Press the **Voicemail** button.
2. Enter your password followed by #.
3. Press 7 for Mailbox Options.
4. Press 2, and then follow the prompts.



Tip

When you log in to voicemail, the system notifies you if any availability state other than the Available state is in effect.

Changing a Phone's Extension Assignment

With the appropriate permissions (set by your ShoreTel Connect administrator), you can assign your extension to any system phone. This feature is helpful if you are using someone else's office and phone temporarily.

You can also use ShoreTel Connect client to unassign an extension.

To change a phone's extension assignment:

1. Press the **Voicemail** button on the target phone.
2. Enter your password followed by **#**.
3. At the Main Menu prompt, press **7**.
4. Press **3** to reassign your extension, and then do one of the following.
 - Press **1** to assign the extension.
 - Press **2** to unassign the extension so that the phone reverts to the extension originally assigned to it.



Note

If you assign your extension to a phone that is normally occupied by another user, calls to the original user's extension are forwarded to the destination that user has defined for the active availability state.

Paging

If your phone and other phones at your site are configured for paging, you can speak a message to be heard on a connected speaker, usually overhead. To use the paging function, your ShoreTel Connect administrator must give you access.

To send a page:

1. Dial the number your ShoreTel Connect administrator provided and wait for the confirmation tone, and then begin speaking into the handset.
2. Hang up when you are finished.



Note

If you hear an error tone when you try to page, paging might not be configured at your site or you might not have the necessary permissions to use paging. Contact your ShoreTel Connect administrator for assistance.

Picking up the Night Bell

A night bell allows calls to route to an extension that rings on an overhead speaker. This feature can be convenient for off-hours when a caller needs to speak with anyone at a site. If you want to use the night bell function, the feature must be configured at your site and your ShoreTel Connect administrator must authorize your access.

To pick up the night bell:

- When you hear the phone ring on the overhead speaker, dial ***14** to answer the call.



Note

If you hear an error tone when you try to pick up the night bell, the night bell might not be configured at your site or you might not have the necessary permissions to answer it. Contact your system administrator for assistance.

Changing a Hunt Group's Status

Hunt groups allow a call to be offered to a set of user extensions, and they can be configured so that all of the hunt group extensions ring simultaneously or one extension at a time.

With the appropriate permissions, you can toggle the status of the entire hunt group from busy to not busy (or vice versa). This feature is especially useful when hunt group members are in a meeting or out of the office.

To toggle a hunt group's status:

- Dial ***18** and then the extension associated with the hunt group.

Silently Monitoring a Call

With the appropriate permissions (set by your ShoreTel Connect administrator), you can listen to a call without being heard.

To silently monitor a call:

- Dial ***17** and then the extension on which the call is active.

You are added to the existing call without being heard by any party.

Silently Coaching in a Call

With the appropriate permissions (set by your ShoreTel Connect administrator), you can listen to and coach someone during a call without the outside party hearing.

To coach in a call:

- Dial ***22** and then the extension on which the call is active.

You are added to the existing call and can listen and speak without being heard by the outside party.

Barging in on a Call

With the appropriate permissions (set by your ShoreTel Connect administrator), you can join an in-progress call (“barge in”) as a conferenced participant.

To barge in on a call:

- Dial ***16** and then the extension on which the call is active.

CHAPTER

3

Using Voicemail

This chapter provides information about using the voicemail system. It contains the following information:

Logging in to Voicemail	29
Logging in to Voicemail from Your Phone	29
Logging in to Voicemail from Another Extension	29
Logging in to Voicemail from an External Phone	29
Interacting with New Messages	30
Using Shortcut Keys	30
Listening to, Replaying, Saving, and Deleting Messages	30
Forwarding a Message	30
Replying to a Message	31
Listening to Saved Messages	31
Sending Messages from Voicemail	31
Leaving a Message and Using Message Options	32
Using Mailbox Options	33
Recording Your Name	33
Recording a Personal Greeting	33
Setting Your Password	34
Assigning Your Extension to a Phone	34
Changing Your Availability State	34
Enabling or Disabling Envelope Information	35
Listening to Your Deleted Messages	35
Removing Deleted Messages	35
Enabling or Disabling Automated Call Handling in Outlook	36

Listening to Your Deleted Messages	35
Removing Deleted Messages.....	35
Enabling or Disabling Automated Call Handling in Outlook.....	36
Enabling or Disabling a Notification Profile.....	36
Changing the Workgroup Agent State	36
Enabling or Disabling Find Me Forwarding.....	37

Logging in to Voicemail

A voicemail icon and a steadily flashing red light in the upper right corner of your phone indicate that you have unheard messages. To hear your messages, you must log in to the voicemail system.

You can also log in to the voicemail system from another extension or from an external phone.

Logging in to Voicemail from Your Phone

1. Press the **Voicemail** button.
2. Enter your password, and then press **#**.

Logging in to Voicemail from Another Extension

You can log in to the voicemail system from another extension in your ShoreTel Connect system, whether it is an IP phone or an analog phone.

1. Do one of the following:
 - Press **#** while the phone is on hook and idle or off hook with dial tone.
 - Press **#** while the phone off hook with dial tone.
 - Press the **Voicemail** button.
2. At the prompt, press **#** and then enter your extension.



Note

If you are using a phone that is in an “Available” or “Anonymous” state, you do not have to press **#** to be prompted to enter your extension.

3. Enter your password, and then press **#**.

Logging in to Voicemail from an External Phone

1. Dial the voicemail access number provided by your ShoreTel Connect administrator.
2. At the prompt, press **#** and then dial your extension.
3. Enter your password, and then press **#**.

Interacting with New Messages

This section describes shortcuts and common tasks for handling messages in the voicemail system.

Using Shortcut Keys

You can press the following keys while listening to messages:

- To hear envelope information (time and date sent, user's name) for a message, press **6**.
- To rewind to several seconds earlier in a message, press **7**.
- To pause a message, press **8**.
- To fast forward to several seconds later in a message, press **9**.
- To continue to the next message, press **#**.
- To hear additional options, press **0**.

Listening to, Replaying, Saving, and Deleting Messages

1. Log in to voicemail.
2. To listen to new messages, press **1**.
3. As you listen to each message, you can do one of the following:
 - To replay a message, press **1**.
 - To save a message, press **2**.
 - To delete a message, press **3**.

Forwarding a Message

1. Log in to voicemail.
2. To listen to new messages, press **1**.
3. After listening to the message you want to forward, press **4**.
4. Record a prefacing remark, and then do one of the following:
 - If you are satisfied with the prefacing remark, press **#**.
 - To review the prefacing remark, press **1**.
 - To rerecord the prefacing remark, press **2**.
 - To cancel the recording, press *****.



Tip

After addressing a message, you can press **1** to mark it urgent.

Replying to a Message

1. Log in to voicemail.
2. To listen to new messages, press **1**.
3. After listening to the message you want to reply to, press **5**.
4. Choose one of the following options:
 - To reply with a voice message, press **1**.
 - To reply with a call back, press **2**.
 - To reply to all with a voice message, press **3**.
 - To return to the previous menu, press *****.

Listening to Saved Messages

1. Log in to voicemail.
2. From the voicemail Main Menu, press **3**.

To interact with saved messages, press any one of the options (except for option 2) described in [Interacting with New Messages](#) on page 30.

Sending Messages from Voicemail

1. Log in to voicemail.
2. From the voicemail Main Menu, press **2**.
3. Record the message and select one of the following options:
 - To cancel the message recording, press *****.
 - To finish recording, press **#**.
 - To review the message, press **1**.
 - To rerecord the message, press **2**.
4. After you are satisfied with your recording, press **#** to finish recording.
5. At the prompt, enter the recipient's extension.

6. To choose additional addressing options, press **0** and select any of the following options:
 - To look up a recipient by name in the directory, press **1**.
 - To send a personal distribution list, press **2**.
 - To broadcast to all extensions, press **3**.
 - To cancel addressing options, press *****.
7. After the message is addressed, select any of the following options:
 - To mark or unmark a message as urgent, press **1**.
 - To request a return receipt, press **2**.
 - To send the message, press **#**.

Leaving a Message and Using Message Options

When the recipient of your call does not answer and has not opted to automatically forward calls, you can leave a message when prompted.

1. Enter one of the following options while listening to the mailbox greeting:
 - To bypass the greeting and leave a message, press **#**.
 - To transfer to an assistant, press **0**.
 - To return to the auto-attendant, press **9**.
 - To forward your call to the recipient's Find Me destination (an optional number where calls can be forwarded), press **1**. If a Find Me destination is not enabled, the system plays a tone and then immediately records your message.
2. After recording the message, choose one of the following options:
 - Hang up to send the message.
 - To access message options, press **#** and select one of the following message options:
 - To send the message, press **#**.
 - To cancel the message, press *****.
 - To review the message, press **1**.
 - To rerecord the message, press **2**.
 - To mark or unmark the message as urgent, press **3**.
 - To mark or unmark the message as private, press **4**.
 - To transfer to the auto-attendant, press **9**.
 - To transfer to the assistant, press **0**.
 - To rerecord the message, press *****.
 - To send the message and transfer to an assistant, press **0**.
 - To send the message and transfer to the auto-attendant, press **9**.
 - To send the message and forward it to the recipient's Find Me destination (if enabled), press **1**.

Using Mailbox Options

The Mailbox Options submenu in the voicemail system lets you:

- record your name
- record a personal greeting
- set your password
- assign your extension to a phone
- change your availability state
- enable or disable envelope information
- listen to deleted messages
- remove deleted messages
- enable or disable Outlook-automated call handling
- enable or disable email delivery
- change the agent state
- enable or disable Find Me forwarding

Recording Your Name

1. Log in to voicemail.
2. From the voicemail Main Menu, press **7** to access mailbox options.
3. Press **6**.
4. Record your name, and then press **#**.
5. Choose one of the following options:
 - To accept your name recording, press **#**.
 - To review your name recording, press **1**.
 - To rerecord your name, press **2**.
 - To delete this recording, press **3**.
 - To cancel, press *****.

Recording a Personal Greeting

1. Log in to voicemail.
2. Press **7** to access mailbox options.
3. Press **1** to record a personal greeting.

**Note**

The personal greeting is linked to the active availability state.

4. Record your personal greeting for the currently active availability state at the tone and press #, then select from the following options:
 - To accept the personal greeting, press #.
 - To review the personal greeting, press 1.
 - To rerecord the personal greeting, press 2.
 - To cancel the recording, press *.

Setting Your Password

1. Log in to voicemail.
2. From the voicemail Main Menu, press 7 to access mailbox options.
3. Press 4.
4. Enter your new password, and press #.
5. Do one of the following:
 - To confirm your new password, enter your new password again, and then press #.
 - To cancel the new password, press *.

Assigning Your Extension to a Phone

If you have the proper permission, you can assign your extension to any system phone through the voicemail system. For details, see [Changing a Phone's Extension Assignment](#) on page 24.

Changing Your Availability State

Availability states let you specify your status and determine how inbound calls are handled. You can record distinct greetings and specify different call forwarding options for each state.

To change your availability state:

1. Log in to voicemail.
2. From the voicemail Main Menu, press 7 to access mailbox options.
3. Press 2 to set an availability state.

4. Choose one of the following availability states or other options:
 - For Available, press **1**.
 - For In a Meeting, press **2**.
 - For Out of Office, press **3**.
 - For Vacation, press **4**.
 - For Custom, press **5**.
 - For Do Not Disturb, press **6**.
 - To enable calling additional phones (configured by your ShoreTel Connect administrator), press **7**.
 - To cancel, press *****.

The availability state stays in effect until you change it. However, if Outlook automated call handling is active, Outlook modifies your availability state based on your status.

Enabling or Disabling Envelope Information

A message's envelope information includes the date and time of your message's delivery and your name. By default, envelope information is disabled.

1. Log in to voicemail.
2. From the voicemail Main Menu, press **7** to access mailbox options.
3. Press **5** to toggle between disabling and enabling envelope information.

Listening to Your Deleted Messages

As a safeguard against accidental deletion of messages, the voicemail system retains deleted messages for a few hours.

1. Log in to voicemail.
2. From the voicemail Main Menu, press **7** to access mailbox options.
3. Press **7** to listen to deleted messages.

The voicemail system plays all deleted messages that are still available to the system. You can manage these messages as if they were new messages.

4. Press **2** to restore the deleted message and save it.

Removing Deleted Messages

1. Log in to voicemail.
2. From the voicemail Main Menu, press **7** to access mailbox options.
3. Press **8** to remove deleted messages.

4. Press one of the following options:
 - To confirm removal of deleted messages, press **1**.
 - To cancel removal of deleted messages, press *****.

Enabling or Disabling Automated Call Handling in Outlook

1. Log in to voicemail.
2. From the voicemail Main Menu, press **7** to access mailbox options.
3. Press **9**.
4. To enable or disable Outlook automated call handling, press **1**.

Enabling or Disabling a Notification Profile

1. Log in to voicemail.
2. From the voicemail Main Menu, press **7** to access mailbox options.
3. Press **9**.
4. Press **2**.
5. Choose one of the following options:
 - Enter the number of the new notification profile.
 - To cancel, press **#**.

Changing the Workgroup Agent State

If a workgroup agent state is active on your phone, your phone displays an icon to indicate which state is currently active. For the workgroup agent state icons and descriptions, see [Table 1](#) on page 14.

1. Log in to voicemail.
2. From the voicemail Main Menu, press **7** to access mailbox options.
3. Press **9**.
4. Press **3**.
5. Chose one of the following options:
 - To log in, press **1**.
 - To log out, press **2**.

Enabling or Disabling Find Me Forwarding

When Find Me forwarding is enabled, calls sent to voicemail are routed to your Find Me forwarding destination if the caller presses 1 while listening to your voicemail greeting.

You can enable or disable the Find Me forwarding option for the availability state that is currently active. However, you hear the option to enable or disable Find Me forwarding only if it is configured in one of the following ways:

- Your ShoreTel Connect administrator enabled the Find Me option for you, and you configured a Find Me destination in the ShoreTel Connect client.
- You used the ShoreTel Connect client to enable the Find Me option and to configure a Find Me destination.

To enable or disable Find Me forwarding:

1. Log in to voicemail.
2. From the voicemail Main Menu, press **7** to access mailbox options.
3. Press **9**.
4. Press **5**.
5. Chose one of the following options:
 - To enable Find Me forwarding, press **1**.
 - To disable Find Me forwarding, press **2**.

CHAPTER

4

Troubleshooting

This chapter provides information to help you diagnose and address problems with your phone. It contains the following information:

Problems and Solutions	39
Viewing Phone Information	39
Rebooting Your Phone	40

Problems and Solutions

Table 2 shows common problems and solutions.

Table 2: Troubleshooting

Problem	Solution
When callers try to leave a message, they are notified that your mailbox has exceeded its limit and is unable to accept new messages.	Your mailbox is full. You must delete messages you no longer need.
Your phone's display shows "No Service."	Your phone is temporarily inoperable. Contact your system administrator.
Your phone's display is blank.	Try the following solutions: <ul style="list-style-type: none"> ■ Your phone might be in power-saving mode. Go off hook or press any key to bring the phone screen back to full brightness. ■ The phone might not be connected to a working power source. Contact your system administrator.
You hear no dial tone when you take the handset off hook, but you hear a dial tone when using either the speaker or a headset.	The handset cable must be plugged firmly into place on both the phone base and the handset. To ensure a tight connection, unplug and reconnect the cable at both points, clicking the jack firmly into place. Take the handset off hook and listen for a dial tone.



Note

The mailbox warning is triggered when there is space for only 10 additional messages in your voice mailbox. As your voice mailbox approaches its limit, a warning message is played indicating that there is enough space for only "n" number of messages, where "n" is a countdown from 10 to 0. This message is played each time you log into the voicemail system until you delete enough messages to reduce the number of messages below the threshold.

Viewing Phone Information


You can view information about your phone, such as its IP address, subnet mask, version, and MAC address.

1. With the phone on hook, press the  button.

The LED should *not* light and you shouldn't hear any tones; if this isn't the case, lift and replace the handset.

2. Dial **4636** (the digits that correspond with I-N-F-O), and then press **#**.

Rebooting Your Phone

1. With the phone on hook, press the  button.

The LED should *not* light and you shouldn't hear any tones; if this isn't the case, lift and replace the handset.

2. Dial **73738** (the digits that correspond with R-E-S-E-T), and then press **#**.

3. Select one of the following options:

- To reboot your phone, use the navigation key pad to scroll to Reset, and press the selector button on the navigation key pad.

Your phone reboots.

- To cancel the reboot, use the navigation key pad to scroll to Exit, and then press the selector button on the navigation key pad.

The reboot process is cancelled, and your phone returns to normal operation.



Tip

While it is also possible to reboot your phone by unplugging the Ethernet cable from the back of your phone and plugging it in again, the preferred method is the one described in this procedure because it maintains the PC connection.
