

# Quick Guides

## ShoreTel Communicator Quick Reference Guide

### Did you know?

ShoreTel Communicator is the easiest way to communicate efficiently with your colleagues and work partners. Communicator offers a set of productivity tools that improve communications whether you are a standard user or an operator and whether you are working from home, on the road or based in an office. This document can help you find your way around this feature-rich application. Refer to the ShoreTel Communicator User Guide for further details.

#### Windows Menu

Open Communicator viewers in the main window.

#### Application Button

Access configuration options and most common functions.

#### Assignment Menu

Assign Communicator to your Primary Phone device or SoftPhone.

#### Call Handling Mode Menu

Swiftly change your active Call Handling mode.

#### Playback Button

Listen to voicemail through your PC or phone.

#### QuickDialer

Dial contacts by entering their name or number.

#### Call Control Buttons

Access common calling operations with a single button.

#### Active Call Area

Manage and view your voice calls.

#### IM Presence Menu

View and manage your instant messaging presence.

#### Viewers

Access directory entries, voicemail, call history, contact list, and speed dial list.

#### Viewer Tabs

Select tab to display the desired viewer.

### Call Control Buttons

-  Answer
-  Hang up
-  Hold
-  Transfer
-  Conference
-  Video
-  IM
-  Call Notes

### What is the Contact viewer?

The Contact viewer is available in the Professional Access and Operator Access by clicking the Contact tab at the bottom of the panel. A contact is a person with whom you frequently communicate. After adding a Contact in this window, you can see the contact's phone status and, optionally, PC presence of that contact. You can organize Contacts into Groups for faster handling.

If you use Operator Access, the new Contact viewer replaces the Extension Monitor available in previous versions.

### How do I create a Contact?

Place your mouse anywhere inside the Contact window, right click and select "Add Contact". Enter the name of the Directory entry to be added to the Contact List in the search field. If you are linking this contact from an existing Directory, enter the contact's name in the search field. Click on the contact name and all other data fields will automatically populate and cannot be edited. Select "OK" to create the Contact.



### How do I separate a viewer from the main Communicator?

In Personal and Professional Communicator, you enable panel placement by selecting Options -> General, then selecting Enable drag-and-drop window arrangement.

To separate a panel from a viewer in Operator Communicator, point the cursor at the tab of the panel to be removed, left click and hold the mouse button, then drag the panel outside of the window boundary.

This operation is particularly useful for operators who want to have a separate view of the Contact Viewer, which replaces the extension monitor of the previous client version.



### How do I dock the main window?

Communicator provides four docked window settings, one for each edge of the computer monitor. You can access this setting by selecting the Application Button -> View, as shown here.

# ShoreTel® Voice Mail Quick Reference

## VOICE MAIL OPERATIONS

(Instructions for Voice Mail owners)

### New Voice Mail Indicators

Your voice mailbox contains unplayed messages if:

- You hear a stutter tone on the handset.  
OR
- The phone's message waiting light flashes.

### Checking Voice Mail

#### To check voice mail from your extension

- 1 Press **7** or lift the handset and press **#**.
- 2 At the prompt, use the dial pad to enter your password. (If you have not been assigned a password, use the default password, 1234.)
- 3 Press **#**.

**NOTE** If you are logging in for the first time, the system prompts you for a new password and asks you to record your name.

#### To check voice mail from another extension

- 1 Press **#** twice.
- 2 Enter your extension.
- 3 Enter your password.
- 4 Press **#**.

#### To check voice mail from an external phone

- 1 Dial your voice mail access number.
- 2 Enter your extension.
- 3 Enter your password.
- 4 Press **#**.

### Listening To Messages

At the Main Menu prompt, press **1**. The voice mail system plays urgent messages first, then newly arrived messages.

The system gives the delivery date and time for each message. (You can disable this feature from the Mailbox Options Menu.)

### Managing Messages

After listening to a message, you can replay it, send a reply to the person who left the message, forward it to someone else, replay the date and time information, save it, or delete it.

#### To replay all of your saved messages

- Press **3** at the Main Menu prompt.
- As a safeguard against accidental erasures, the system retains deleted messages for a few hours.

#### To listen to your deleted messages

- 1 Press **7** at the Main Menu prompt.
- 2 Press **7**.

Voice mail plays all the deleted messages still available to the system. During playback, you can manage deleted messages as if they were newly arrived messages.

#### To restore a deleted message

- Press **2**.

#### To send a recorded message from voice mail

After recording a message, voice mail asks you to supply an address.

- 1 Address the message to individual recipients by entering their extension numbers.
- 2 Specify groups of recipients by entering a distribution list number.

To identify a recipient by name, specify a personal distribution list, or broadcast to all extensions, press **0** and follow the prompts.

#### To mark a message as urgent

- After addressing the message and confirming the addressee(s), press **1**.

#### To forward the message you're reviewing

- 1 Press **4** and follow the recorded prompts.

#### To reply to the message you're reviewing

- 1 Press **5** and follow the recorded prompts.
- 2 Press **1** to reply with a voice mail, press **2** to reply with a call back, or press **3** to reply to all with a voice message.

### Changing Mailbox Options

Personalize your voice mail by changing your name, password, or personal greeting.

To change personal settings from the Main Menu, press **7** and follow the recorded prompts.

### Enabling Office Anywhere (On-Net)

If you have the proper permission, you can assign your extension to any phone on the system.

- 1 Log in to voice mail from the target phone— an extension other than your own.
- 2 At the Main Menu prompt, press **7**.
- 3 Press **3** to re-assign the extension.
  - Press **1** to assign the extension.
  - Press **2** to un-assign the extension. (The phone reverts to its original extension.) (Off-Net Extension Re-assignment cannot be configured through the voicemail system and must be configured through PCM. Refer to the Administration Guide for details.)

### Setting Call Handling and Forwarding

**NOTE** Use ShoreWare Call Manager to configure the modes with different call forwarding destinations and personal greetings.

You can set one of five distinct call handling modes for your extension. When you record a personal greeting, it is linked to the active call handling mode.

To enable one of the five distinct call handling modes:

- Press **7** at the Main Menu prompt.
- Press **2**, then follow the prompts.

### Changing Notification Options

To select a notification profile for the Escalation Notification feature:

- Press **7** at the Main Menu prompt.
- Press **9** for additional mailbox options.
- Press **2**, then follow the prompts.

**NOTE** You must have notification profiles previously configured before a notification profile can be activated.

### Enabling FindMe

To enable or disable FindMe Forwarding so that callers can forward their calls to your destination:

- Press **7** at the Main Menu prompt.
- Press **9** for additional mailbox options.
- Press **5**, then follow the prompts.

**NOTE** You must have permission to use FindMe Forwarding.

## LEAVING A MESSAGE

(Voice mail options when in mailbox)

### Troubleshooting

If the number of messages in your mailbox exceeds the limit, the system notifies callers that your mailbox is full and unable to accept new messages. (Recently deleted messages remain in the mailbox and are included in the total count.)

If your mailbox is full, first purge any backlog of deleted messages.

#### To purge deleted messages

- 1 At the Main Menu prompt, press **7**.
- 2 Press **8** to remove deleted messages.
- 3 Press **1** to confirm deletion or \* to cancel.

### Leave Message

When dialing into a ShoreTel system, if the person you are trying to reach does not answer, your call will be sent to a mailbox and you will hear a standard greeting. You can select from the following options:

- # Bypass greeting
- 0 Transfer to assistant
- 1 Forward to recipient's FindMe destination
- 9 Transfer to Auto-Attendant

### Message Recording

If you choose to leave a recorded message, the following options are available after recording your message:

- # Message options
- \* Re-record
- 0 Send message, transfer to assistant
- 1 Send message, forward to recipient's FindMe destination
- 9 Send message, transfer to Auto-Attendant

**NOTE** Hanging up sends the message.

### # Message Options

When leaving a message, select from the following options:

- # Send message