



ShoreTel Tips

Call Appearance Buttons

The Call Appearance buttons are the eight circles on either side of the phone's display. When receiving a call, the button will flash **Green**. When a call is on hold, it will flash **Orange**. If you are **Monitoring** an extension (answering their calls) the call appearance button will be steady **red** if they are on the phone. **You** can easily switch between lines by pressing the button associated with that call, and the previous caller will automatically be put on hold.

To put a call on **Hold**, simply press the **Call Appearance Button** for that call. The light will flash orange to reflect the hold.

Changing your ringtone

To change the ringtone for your ShoreTel 480 desk phone, press the **Options** softkey below the display. You will be prompted for your voicemail password. Once logged in, use the navigator buttons to locate the **Ringtone** menu and press the selector. Highlight the ring/music you'd like to hear and press the selector to confirm. You may preview by pressing the **External** softkey while the ringtone is highlighted and the music will play through the speakerphone.

Changing Call Handling Modes

- 1) You can access them by pressing the **Mode** softkey below the display and using the navigator to select **Standard, In a Meeting, Out of Office** or **Extended Absence**.
- 2) In your Communicator software, the current call handling mode is displayed in the application bar. Press this icon to see the drop down menu and change your status.
- 3) Log into your voice mail box by lifting the receiver and pressing **#**. Enter your password and then press **7** to go to your **Mailbox Options**. Press **2** to access the call handling modes.

Using the Directory

You can use the directory at any time off the phone or on a call by pressing the **Directory** key. If you are transferring a call or initiating a conference, you may press the **Directory** key to search for the person by extension, first or last name.

The Communicator software has a **Directory** tab at the bottom of the window. Left click to view this tab and display all users on the Shoretel network. Call a user by double clicking on their name. You can easily sort the users by name, extension, mobile number, etc.

Initiating a 3 person conference call

- 1) Pick up the receiver and dial the first person's extension or outside number.
- 2) Once you're on with the first party and ready to include the third person, press the **Conference** button on the phone.
- 3) The first party will automatically be put on hold.
 - a. To cancel the conference at this point, press the **Cancel** soft key or the **Hold** button.



- 4) Dial the extension or outside number of the person you'd like to include in the conference call. You then have two options:
 - a. Quickly press the **Confer** soft key to initiate a blind conference (the third person will not know they are coming into a conference call).
 - b. Remain on the line to speak with the person you are inviting to the conference, in order to prepare them.

- 5) Once you're ready, press the **Yes** soft key to proceed with the conference and have all three parties on the call.

When you are engaged in a conference call, you can press the **Show** soft key to display the names of the parties involved. You can drop a caller from the conference at this point by using the navigator to select their name and then pressing the **Drop** soft key. You may press **Cancel** to go back.

Call Appearance and Availability

The **Call Appearance** (displayed in the Contacts window of the Communicator software) is the first colored coded circle that is displayed, and lets everyone at The Cleveland Foundation know if you are on the Phone, In a Meeting or Out of the Office.

Status Colors and Meanings:

Green: The user is in Standard Calling Handling Mode

Orange: The user is currently on the phone

Red: The user is either in a Meeting/Or out of the Office.

(If you put the cursor over the contact, it will state either in a meeting, or out of the office. These are both Do Not Disturb modes, so if you call, or transfer a call- it will immediately go into voicemail.)

Yellow: The user is "idle". A user will automatically go into idle due to no keyboard activity

Creating contact groups

To create groups in your **Contacts** tab, you first need to view the tab in **List** form. To do this, right click in the **Contacts** tab and select **List** from the pop up menu. When adding contacts, you can then select which group to add them to. With existing contacts, left click and hold on the contact you'd like to move. Drag the contact into the group you want to add them to and release left click.

Checking Voicemail away from your office

- 1) You can call into the system using an external number if you are provided one by your administrator. Once the call connects, press # and then enter your extension. You will be prompted for your password and then entered into your personal mailbox.
- 2) It is possible to receive emails with sound files of your voicemail messages. To enable this, please go to the **Tools/Options** menu at the top of your Communicator window. Under the **Voicemail** heading, use the drop down menu for **Notification Delivery Options** to select **Email Wave File**. Confirm the email address you'd like the messages sent to.

Visual Voicemail

Click the **Voicemail** tab at the bottom of the Communicator software to access your voicemail. You can also access this tab by clicking the **Windows** button at the top of the Communicator and selecting **Voicemail**. To listen to a voicemail, double click the message and it will play through the speaker on your 480 phone. Pick up the receiver to hear your message through the earpiece. Right click the message and select **Delete** from the menu.



Changing your voicemail password

You can change your voicemail password easily and quickly by opening the **Tools>Options** menu and selecting **Voicemail**. Click **Change Password** and follow the prompts.

Record greetings for Call Handling Modes

Click **Tools>Options** and select the call handling mode you wish to record your greeting for on the left. Click **Record Greeting** and follow the prompts. Press the record (**red circle**) and wait for the tone before speaking into your receiver. Once finished, press stop (**grey square**) and save it by clicking **OK**.

Routing calls with Communicator

Under the **Tools>Options** menu, you will need to enter your available phone numbers in the **My Phones** tab to the left. Select **Incoming Call Routing** (on the left) to display the options for routing your calls to different numbers (Primary desk phone, mobile, etc.) depending on your **Call Handling Mode**. Using the drop down menus, select which additional phones you would like to ring according to your status.

Customizing the look of Communicator

Under the **Tools>Options** menu, select **Customization** from the list to the left. You will need to check the box for **Enable Drag and Drop Window Arrangement**. This will allow you to place the windows (**Contacts, Voicemail, Directory**, etc.) anywhere on your screen. Left click on tab you'd like to move from the bottom of the screen. While holding left click, drag the window and release left click to save this position. Alternatively, when dragging the window, release left click over one of the four pane icons at the Top, Bottom, Left and Right side of your display. This allows you to see this tab at all times in your Communicator, based on your choice. To return the window to its original position, left click on the window title (**Contacts, Voicemail, Directory**, etc.) and hold. Drag the window back down to the tabs at the bottom of the screen and release.

Picking up a call

While working closely to a person or a group of people, you can pick up their phone if you hear the call ringing and you have permission to answer it. Press the **Pickup** softkey and enter the person's extension of the call you wish to pick up.

Parking a call

You can **Park** a call on a person's extension. While on the phone with the caller, press the **Park** softkey and enter the person's extension. This will not ring the person's phone so you must **Page/Intercom** them to make sure they know they have a call parked.

If you are the person picking up the call and you are at your desk, your phone will light up, notifying you that you have a parked call. Pick up your receiver to answer it. If you are not at your desk, you can go to any ShoreTel phone in your system, press the **Pick Up** softkey and enter your extension to pick up the call.

Reminders:

- If all the call appearance buttons are red, you are in a **Do Not Disturb** mode. No calls are coming through to your phone. All calls are going straight to voicemail.
- Always exit out of **Directory** and **History** on your phone. If you forget and you pick up your receiver, you will call the person who is selected.
- To mute yourself during a call, press the microphone button. The button will shine red when muted.
- You **MUST** dial the trunk access code on your phone to dial out. You do not have to dial the trunk access code while dialing in Communicator.

