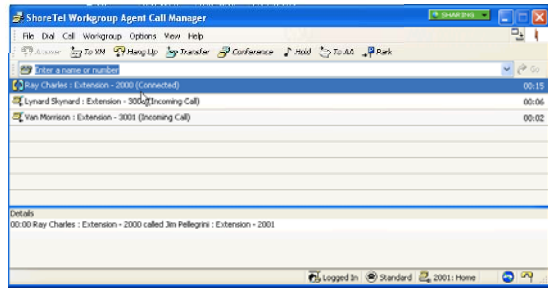


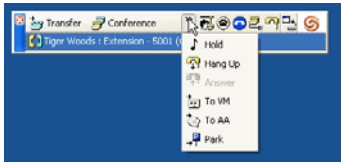
## Call Manager Views

The **Detailed View** includes Quick Dialer, Active Call List and Call Details. The menus provide access to all features.



To alternate between views:

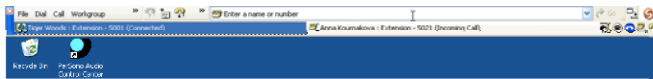
- Click .



The **Compact View** appears first when Call Manager is opened. It includes access to most functions of the toolbar and additional features are available by right-clicking . Click to view Tool Bar features.

The **Docked View** is a toolbar that is docked at the bottom or top of the desktop.

Note: To get 2 lines, click .



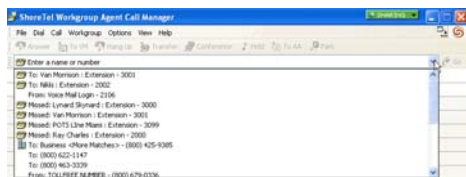
## Making a Call / Quick Dialer

To make a call:

- Highlight the text “Enter a name or number.”
- Type the name or number. (You do not need to enter “9” to dial off-site.)
- Press **Enter** to dial.

To hang up:

- Put the receiver on the hook.
- Or • Click .



**Quick Dialer Tips**

- Q. D. looks up contacts by partial, whole or company names. You can drag numbers from documents and drop it in Q.D.

To use Q.D. to redial recently called numbers:

- Click .
- Select the name from the list with the down arrow.
- Press **Enter** to dial.

## Answering a Call / Call Stack

To answer the first call:

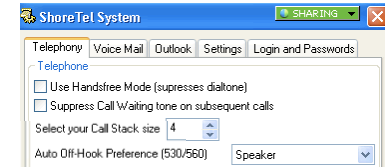
- Pick up the phone receiver.
- Or • If you wish to answer via the speaker on your phone, double click the incoming call.
- Or • If you wish to answer while using a headset, click .

To answer subsequent calls:

- Double click the incoming call. (First call automatically holds.)
- Or • Click .

To configure the call stack size (the maximum number of incoming & outgoing calls handled on Call Manager):

- Right click .
- Click “Configure ShoreTel System.”
- Click the “Telephony” tab.
- Enter the stack size.
- Click “OK.”



## Hold

To place a call on hold:

- Click .

Or • Double click the call.

To take a call off hold:

- Double click the call.

## Transfer

To transfer a call (blind transfer):

- Click .
- In the Dial box, enter the name or number where you want to transfer the caller.
- Select the desired name or number.
- Click .

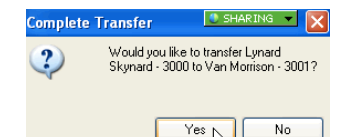
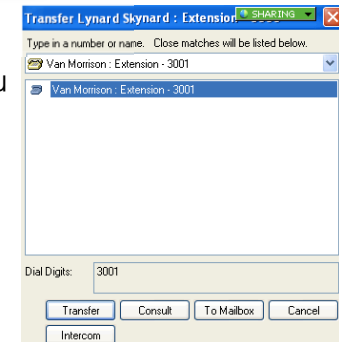
To transfer a call (consultive transfer):

- Click .
- In the Dial box, enter the name or number where you want to transfer the caller.
- Select the desired name or number.
- Click .
- Announce the call.

To complete transfer, click “Yes.”



To cancel the transfer and return to the caller:

- Click “No.”





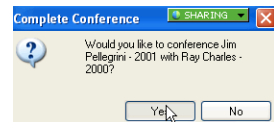
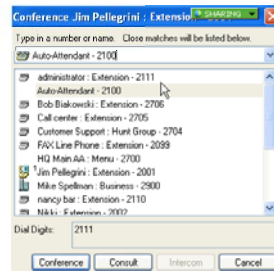
## Conference

### To conference a third party to an active call:


- Click  Conference .
- In the Dial box, enter the name or number of the third party you want to add.
- Select the desired name or number.
- Click  .

### To make a consultative conference:

- Click  Conference .
  - In the Dial box, enter the name or number of the third party you want to add.
  - Select the desired name or number.
  - Click  .
  - Announce call.
  - To bring all parties together, click “Yes.”
- To cancel adding the party and return to the first party:**
- Click “No.”




### To drop a party from the conference call:

- Highlight the name of the person to drop.
- Click  Drop Party .


## Join

### To join two active calls into a conference:



- Place the first call on hold.
- Answer the second call.
- Select the call on hold with a single click.
- Click  Conference .

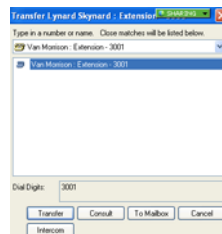
## Sending Calls to Voice Mail

### To send a call to your voice mail:

- Highlight the call.
- Click  To VM .

### To send a call to another person's voice mail:

- Click  Transfer .
- In the Dial box, enter the name or number of the person the caller wants to leave a voice mail for.
- Select the desired name or number.
- Click  To Mailbox .



- Desktop application
- Productivity tool
- Point-and-click call management
- Customizable call handling
- Seamless integration with Outlook
- Visual Voicemail
- Unified Messaging

## Personal Call Manager Phone Features


### Quick Reference Guide

## Launching / Quitting Call Manager

### To start Call Manager from the Start menu:

- Click “Start” > “Programs” > “ShoreTel Communications” > “ShoreTel Call Manager.”

### To auto-start Call Manager at log in:

- Right click  .
- Click “Configure ShoreTel System.”
- Click Settings tab.
- Select “Call Manager automatically when I log into Windows.”
- Click “OK.”

### To quit Call Manager:

- Click  .

Or • Right click the Call Manager icon in the Windows status area.

- Click Exit.

## Help

### To use the Help system:

- Right click  .
- Choose “Contents and Index.” (In the Compact or Docked view, choose “Help” > “Contents and Index.”)