



Phone System User Training Session

THE INNOVATION LEADER IN
ENTERPRISE IP TELEPHONY



Introduction and Agenda

.Trainer Information

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.Session Information

- Introductory session with a focus on core features
- Interactive demonstration system for one-on-one

-Training Options Available to You

- <https://www.shoretel.com/stu/connect-client-tutorials/story.html>
- <https://www.shoretel.com/shoretel-university/learn-now>

About The Handset – IP485

8 Programmable Buttons

6 Feature Keys

**(Transfer, Conference, Directory,
History, Voicemail, Hold)**

B&W or Color Display

Full Duplex Speakerphone

**Audio Controls – independent for
ringer, handset and speaker, Headset
Jack, Mute (LED)**



Basic Functions - Overview

After completing this section, you will be able to:

- Place and answer calls**
- Use the Directory and History features.**
- Transfer a call to another user or outside line.**
- Create conference calls.**

Basic Functions – Calls

- You can use the audio control buttons to direct audio to your handset, headset or speakerphone at any time.
- Remember to press “9” for an outside line.
- Switch between calls using your call appearance buttons beside the screen. Switching to another call automatically places your first call on hold.

Basic Functions – Directory

You can use the Directory to find an extension by name. Press the Directory button and use the scroll key to move up and down through the list.

You can also search the Directory by spelling any part of the name of the person you are looking for.

- **For instance, if you were looking for Mike, you would press 6-4-5-3 on the keypad.**
- **Note that you do not have to press the keys multiple times to dial a letter.**

Basic Functions – History

You can use the History function to dial calls you have received or placed recently. Calls made to your phone that you missed also appear here.



Missed call (on main display and in History)

To dial from History, press the History key, then use the scroll keys to find the correct entry and press the Select button OR pick up the handset/headset.

Basic Functions – Transfer A Call

To transfer a call from your extension to another number:

Step 1: Press the Transfer button . The call is put on hold.

Step 2: Dial the extension or external number (remember to dial 9) or use the Directory key, then do one of the following:

- Complete a blind transfer by hanging up or by pressing the Transfer key again.
- Stay on the line after entering the number to speak to the recipient before transferring. After consultation, to hang up press the Transfer key to complete the transfer.
- If you'd like to cancel the transfer and return to the original caller, press the blinking call appearance button to take original caller off hold.

Basic Functions – Conference Call

You can create a conference call with up to 8 parties max (yourself and 7 others)

To create a Conference Call:

Step 1: Press the Conference button . The call is put on hold.

Step 2: Dial the extension or external number (remember to dial 9) or use the Directory key, then do one of the following:

- **Complete a blind conference by pressing the Conference key again.**
- **Stay on the line after entering the number to speak to the recipient before conferencing. After consultation, press the Conference key to add the party.**

Another option:

Step 1: Press an available line appearance key to get new dial tone.

Step 2: Dial the extension or external number.

Step 3: Once the other party answers, press the Join softkey to combine the 2 calls into a conference call. This process can be repeated until you reach 6 parties.

Using Voicemail

After completing this section, you will be able to:

- Use the Voicemail application on your phone.**
- Access the prompts for additional options.**
- Setup your voicemail and retrieve messages.**

Using Voicemail – Day 1

To login to the main voicemail prompts you can:

- 1. Press the Voicemail button, the Call VM softkey, then dial your password followed by #.**
- 2. Dial the “#” key from your phone.**
- 3. The default password is “1234”.**
- 4. The system will walk you through changing your password and recording your name.**
- 5. If you’d like to record a greeting, press 7 and then 1 once you’ve completed the password change and name recording.**

Using Voicemail – Record Name & Change Password

Log into the voicemail system by pressing the Voicemail button, then the Call VM softkey

Choose Option 7 to Change Mailbox Options

To change your password, press “4”

To record your name announcement, press “6”

- **Press # when finished**
- **(# to accept, 1 review, 2 re-record, 3, delete, * cancel)**

Using Voicemail – Record Greetings

Log into the voicemail system by pressing the Voicemail button, then the Call VM softkey

Choose Option 7 to Change Mailbox Options

To record a greeting – press 1

- (# to accept, 1 review, 2 re-record, 3, delete, * cancel)

You have recorded a greeting for your current 'availability state'

To record greetings for other states, change your mode first, then record the greeting

Using Voicemail – Availability States

Press the State softkey from the Home screen

To change mode – press 2, then select mode

- **1 is Available Mode**
- **2 is In A Meeting Mode**
- **3 is Out of Office Mode**
- **4 is Vacation Mode**
- **5 is Custom Mode**
- **6 is Do Not Disturb**
- **7 No Change**
- *** Cancel**

Remember – each mode can have its own custom greeting and other options. Other options are set from the Connect Client Software

ShoreTel Connect Client

The ShoreTel Connect Client software allows users to manage every aspect of their business voice communications with customized call handling features that eliminate time-consuming tasks and maximize productivity.

This simple, easy-to-use application provides call control integrated with calendars and direct visual access to both voice and e-mail messages from a familiar Microsoft Outlook desktop interface.

Key Features

- **Visual Voice Messaging**
- **Instant Messaging**
- **Personalized Call Handling**
- **Instant name lookup from system directory and Outlook contacts**

ShoreTel Connect Client

Username: YOUR E-MAIL ADDRESS

Password: changeme

**Server (if needed):
shoretelhq.flaglercounty.org**

Connect Client Training

Video training for the Connect system is located at:

<https://www.shoretel.com/stu/connect-client-tutorials/story.html>

Online training with audio and video guidance

Self-paced user guide with step-by-step instructions

Internal help resources within the program

Conclusion

Review available training resources to follow-up after this session

Experiment with features when possible to learn more about the systems capabilities

THANK YOU FOR TAKING TIME TODAY!

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