

Personal Call Manager

Step-by-Step Guide



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Company Information

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ShoreWare Personal Call Manager Overview

The ShoreWare[™] Personal Call Manager 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
- Personalized Call Handling
- Instant name lookup from system directory and Outlook contacts

This document is used to introduce you to some of the most frequently used productivity features within the Personal Call Manager, including point-and-click call management, voice mail integration with Microsoft Outlook, and a broad range of call handling capabilities.

For more detailed information, use the ShoreWare[™] Personal Call Manager Help System to access documentation and online help.



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Basic Call Handling

Task	Step-by-Step Instructions
Launching Call Manager	There are two ways to start Call Manager: from the Windows Start menu or by setting Call Manager to auto-start each time you log in to your computer
	To start your Call Manager from the Start menu:
	 Click Start, select Programs, select ShoreTel Communications, and click ShoreTel Call Manager. Call Manager opens.
	To auto-start Call Manager at log in:
	 Right-click the ShoreTel icon, a shortcut menu will appear. Click Configure ShoreTel System. The ShoreTel System dialog box appears. Click the Settings tab. Select Start Call Manager automatically when I log into Windows. Click OK.
Quitting Call Manager	To quit Call Manager:
	 Right-click the Call Manager icon in the Windows status area. A shortcut menu appears. Click Exit. The Call Manager application quits.



Task	Step-by-Step Instructions
Call Manager Views	Compact View:
Shure Tel Advanced Call Manager File Dual Call Options View Help File D	This view appears when you first open the Call Manager application. This view provides access to most functions of the toolbar. Additional features are available if you right-click the ShoreTel icon.
Details	This view provides the <i>QuickDialer</i> , the <i>Active Call</i> list and the <i>Call Details</i> area at the same time. In this view, the menus provide access to all features.
	Docked View:
X] 해Answer [고To VM 핵Hang Up 續Transfer 愛Conference 计Hald ᠉] (會 配er a name or number 文 (? co 🔩 ⑤ ⑧ 좋 대문 (元	This view is like a toolbar that can be docked for quick access at the bottom or top of the Windows desktop.
	The Collapse/Expand buttons can be used to switch between views.
Using the Help System	In the Compact view:
	Right-click on the ShoreTel icon. 🬀
Cover of the formed of the states of modes Cover of the formed of the states of modes Cover of the states of the states of modes Cover of the states o	 Choose Help > Contents and Index from the shortcut menu.
Aloca Calvege Computer Calveger	In the Detailed view:
Development of Call Messager parts Section 1 and 1	 Choose Contents and Index from the drop down menu.
Sortigues C of Maxage, use for Sortigues C of Maxage, use for the Sortigues C of Maxage, use for the	 In the Docked view: 1. Right-click on the ShoreTel icon. S 2. Choose Help > Contents and Index from the shortcut menu,
Stant 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	or 3. From the Help Menu, choose Contents and Index .



Task	Step-by-Step Instructions
Making a Call	 In the Personal Call Manager Quick Dialer, select the text Enter a name or number. Type the name or number of the person you want to call. Press the Enter key to dial the number. The Active Call List displays the status of the call (Outgoing call).
QuickDialer Tips	The fastest way of using the QuickDialer is to start typing the name or number of the person you wish to call.
	The QuickDialer looks up contacts by partial names, whole first or last names, initials or by company name
	 You can use the QuickDialer to redial recently called numbers. 1. Click the QuickDialer drop down list arrow. 2. Select the person's name from the list.
	You can drag a phone number from a document or a Web site and drop it in the QuickDialer. If you drag by using the left mouse button, the number is pasted into the QuickDialer. When using the right mouse button to drag the number, you can dial the number automatically or paste it into the QuickDialer.
	If you have 50 or less entries in your redial list, use the down arrow key to select the person you want to call and the press the Enter key.



Task	Step-by-Step Instructions
What is a Call Stack?	The call stack size is the maximum number of incoming and outgoing calls that you can handle with Personal Call Manager. The call stack size determines the number of calls you can receive before the next call is treated as busy. Even when your call stack is full, Personal Call Manager allows you to place one more outgoing call for performing consultative conferences and transfers. Your call stack size cannot exceed the number configured by your system administrator.
Configuring the Call Stack Size	 From the Personal Call Manager Compact view: Right-click the ShoreTel icon. Click Configure ShoreTel System from the shortcut menu. The ShoreTel System dialog box appears. Click the Telephony tab. The ShoreTel System Telephony dialog box appears. In the Telephone section, enter the stack size in the Select your Call Stack Size box. Click OK to close the dialog box.
What is Handsfree Mode?	Use the Handsfree mode when you want to free your hands up by using a headset or speakerphone. When the Handsfree Mode is activated, ShoreTel suppresses dial tone to the telephone.



Task	Step-by-Step Instructions
Activating Handsfree Mode	 From the Personal Call Manager Compact view: Right-click the Not in Handsfree icon. The Handsfree Mode shortcut menu appears. Click the Handsfree Mode menu option to display the check mark. Personal Call Manager switches to the handsfree mode the icon on the toolbar changes to the Handsfree icon.
Turning Handsfree Mode off	 From the Personal Call Manager Compact view: 1. Right-click the Handsfree Mode icon. C. The Handsfree Mode shortcut menu appears. 2. Click the checkmark in the Handsfree Mode menu. The Personal Call Manager turns off the Handsfree Mode and the icon in the tool bar changes to Not in Handsfree Mode. C.



Task	Step-by-Step Instructions
Answering a Call	To answer an incoming call when
	not in Handsfree Mode:
	1. Pickup the telephone
	receiver when it rings and
	begin to talk.
	2. The call status in the
File Dial Call Options View Help	Active Call List displays
Answer 🔄 To VM 🖓 Hang Up 🍃 Transfer 🖉 Conference 🎝 Hold 🏷 To AA 🚚 Park	(Connected) and the
Ster a name or number	Connected icon appears.
Amage West : Extension - 110 (Incoming Call) 00:11	(<u>)</u>
	To answer an incoming call in
	Handsfree Mode:
	1. Click the Answer button
	on the toolbar.
Details	Answer
UU;UU Mae West : Extension - 110 Called James Dean : Extension - 109	2. The call status in the
. Standard 📴 🗊 🕅	Active Call List displays
	(Connected) and the
	Connected icon appears.
	52
	3. Begin talking.
Sending a Call to Voice Mail	From the Personal Call Manager
ShoreTel Advapced Call Mananer	Compact view:
File Dial Cal of Service Mail 🖓 Answer 🛅 To Mi 🖓 Hang Up 🦢 Transfer 🚀 Conference ्री Hold ैु To AA ्र⊈ Park	1. Highlight the incoming call.
	2. Click the Io VM button.
Grading And West : Extension - 110 (Incoming Call) O0:08	TOVM
Placing the Active Call on Hold	Answer your incoming call:
ShoreTel Advanced Call Manager	1. The call appears in the
File Dial Call Options View Help	Active Call List. The call
Answer 📷 To VM 🖓 Hang Up 🦢 Transfer 🖉 Conference 🕽 Hold 🏠 To AA 📮 Park	status displays
Enter a name or number	(Connected) and the
	Connected icon appears.
	52
	2. Double-click the call in the
	Active Call List to be
	placed on hold.
	3. The Call Status displays
	(On Hold).
	4. Double-click the call on
	hold to take the call off
	hold.



Task	Step-by-Step Instructions
Transferring a Call	From the Personal Call Manager
Transfer Hac West: Extension - 110 Type in a number or name. Observation Maxin Matian : Extension - 121 HO Paging Group - 125 HO Humphrey Bogat : Extension - 112 HO Rating Group - 125 How Paging Group - 125 How Paging Group - 125 Karen Korabek : Extension - 112 Karen Korabek : Extension - 129 Karen Korabek : Extension - 127 Maxin Matian : Extension - 121 Maxin West : Extension - 122 Maxin Matian : Extension - 121 New Hurt Group : Hurt Group - 131 Poky Pig : Extension - 120 Road Runner : Futersion 123 Dial Digts: 121 Transfer Consult To Mailbox Cancel	 Click the Transfer button. The Transfer dialog box appears. In the Dial box, enter the name or number where you want to transfer the call. Select the desired name or number. Click the Transfer button to transfer the call
Consultative Transfer	From the Personal Call Manager
Complete Transfer Would you like to transfer Mae West 10 to Lola Burny - 122; Yes	 Click the Transfer button. Click the Transfer button. The Transfer dialog box appears. In the Dial box, enter the name or number where you want to transfer the call. Select the desired name or number. Click the Consult button. Click the Consult button. The phone you are transferring to rings and the "Complete Transfer" message appears on your screen. When the party answers, you can confer with them before transferring the caller. Click Yes to transfer the call. The caller is then transferred.



Task	Step-by-Step Instructions
Transferring a Call to Another Person's Voice Mail Time Time	 From the Personal Call Manager Compact view: Click the Transfer button. The Transfer dialog box appears. In the Dial box, enter the name or number of where you want to transfer the call. Select the desired name or number. Click the To Mailbox button. The call is transferred to the selected number's voice mailbox.
Making a Conference Call	 <u>To add a third party to an active call</u> <u>from the Personal Call Manager</u> <u>Compact view:</u> Click the Conference button. Conference Conference Conference 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 the Conference button. Conference The new caller is now on the line and the active call lists displays (Conferenced) beside each caller on the conference.



Task	Step-by-Step Instructions
Making a Consultative Conference Call	To add a third party to an active call
<image/>	 To add a third party to an active call from the Personal Call Manager Compact view: 1. Click the Conference button. Conference Conference Conference Conference Conference Click the Consult button. Click the Consult button. Conference" message appears. Phone of the person being conferenced in rings. When they answer, you have a chance to talk to them. Click Yes to connect the new party to the conference. The Active Call List displays the status of the callers. Click No to cancel adding the person to the conference call. The original caller(s) remain on
Yes No Dropping a Party from the Conference Call Answer Ctrl+A, F8 Transfer, Ctrl+T, F10 To Voice Mail Ctrl+Y, F4 To Auto Attendant Conference Conference Ctrl+H, F7 Barge In Ctrl+Shift+B Record Ctrl+Shift+R Drop Party Add/Modity Contact Ctrl+Shift+C View Efror Edit Call Note View Efror Properties Alt+Enter	the line. You can drop a single party from the conference call in Personal Call Manager Compact view: 1. Right-click on the party you want to drop. A pop-up menu appears. 2. Click Drop Party . 3. The party is dropped from the conference call.







Task Viewing Voice Mail Messages in Outlook » **◎ ① ⊡ 2** ~ ⊡ 켞 Answer 🛛 👼 To VM 📸 Enter a name or number Ŧ P Go 🛱 Answer 👘 To VM » 🔊 🖓 🔊 Voice Mail... 📨 Enter a name or number - 6 Make New Call... Ctrl+N Redial Speed Dial Page Ctrl+G Pickup.. Ctrl+P Pickup Night Bell Ctrl+B Configure ShoreTel System... Ctrl+O Ctrl+I History... Voice Mail... Ctrl+M Directory... Ctrl+D View Always On Top Configure Availability...

Step-by-Step Instructions

From the Personal Call Manager Compact view:

- 1. When a new voice message arrives, a cassette tape icon appears.
- 2. Click the **Cassette** icon. A popup menu appears.
- 3. Click the Voice Mail button.
- 4. The Outlook Messages screen appears.
- 5. Double-click the message you want to listen to.

From the ShoreTel icon:

- Right-click the ShoreTel icon.
 A shortcut menu appears.
- 2. Click the **Voice Mail** option. The Outlook Messages screen appears.
- 3. Double click the message you want to listen to.

Note: Depending on your configuration in the **ShoreTel System/Voice Mail** settings, ShoreTel will either ring your phone or play your voice mail messages through your PC speakers.





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Configuring Personal Call Manager

Task	Step-by-Step Instructions
What are Call Handling Modes?	Call Handling modes provide different options for handling calls. You can have different call handling options to manage incoming calls when you are in a meeting, working from home or out of town. Each mode also allows for a different voice mail greeting.
Selecting a Call Handling Mode	 Available Call Handling Modes are: Standard In a Meeting Out of the Office Extended Absence Custom Errom the Personal Call Manger Compact view: Click the current Call Handling Mode icon in the Status Bar. A shortcut menu appears with a list of the five modes. Click the desired Call Handling Mode. The indicator for the selected mode appears.



Task	Step-by-Step Instructions
Configuring A Call Handling Mode	From the Personal Call Manager Compact view:
	1. Right-click the ShoreTel icon.
	2. Click the Configure ShoreTel
	System option. The ShoreTel
ShoreTel System Telephony Volce Mal Outlook Settings Login and Passwords	3. Click the Edit Call Handling
Helephone Use Handsfree Mode (supresses diatone) ♥ Suppress Call Waiting tone on subsequent calls Select a Call Handling Select a Call Handling Mode Standard Edit Call Handling Modes Access Codes Select a default turk socess code: Select a default turk socess code: Select a default turk socess code: Select the call types that appear in All numbers Redial: OK Cancel	 Modes button under the Telephony tab. The Configure Call Handling dialog box appears. 4. Click the tab of the Call Handling Mode you want to configure. 5. Select the desired options for the mode you are configuring. <u>Call Forwarding Condition:</u> Always – Your calls are forwarded to the selected Call Handling Mode destination even if you are available. When No Answer or Busy
	Never – Your calls will never be forwarded to another Call Handling Mode.
	 <u>Call Forwarding Destination:</u> Box – Displays your current call forwarding destinations and routing schemes. Edit Destination button – Opens the Call Handling Destination dialog box and allows you to select the forwarding number and routing plans for incoming calls in the selected Call Handling Mode.
	Greeting: Review/Record Greeting – Opens the Prompt Recorder dialog box to record and play the greeting for this Call Handling Mode.



Configure Call Handling	×
Standard In a Meeting Out of Office Call Forwarding Condition C Always C When No Answer or Busy C Never Call Forwarding Destination Forwarded to Voice Mail - 101 when b 101 after 3 rest.	Extended Absence Custom usy; Forwarded to Voice Mail -
Greeting	Edit Destination
Personal Assistant 0 Forwarded To:	
Notification F Enable Calling Message Notification	Edit Notification
Find Me	Edit Find Me
Call Handling Note	
ОК	Cancel Apply

Configure Find Me				
	Configure Find Me numbers Find Me call handling lets callers that reach your voicemail try to find you a alternate numbers by pression "1" during your			
	greeting. Find Me call handling will not be presented as an option to			
	inbound callers by the system, rather you may choose to tell callers of this option as part of your recorded greeting. First Number: Mae West : Extension - 110			
	Number of Rings: 3			
	Second Number: (408) 998-7654 Number of Rings: 3			
	Send Incoming Caller ID			
	OK Cancel			

Personal Assistant:

0 Forwarded To – Displays your current selection for a personal assistant to whom callers are transferred when they press 0 and do not want to leave a voice message.

Notification:

Enable Message Notification – A check in this box means that the ShoreTel system automatically notifies you of the arrival of voice mail messages, as determined by your message notification settings.

Edit Notification button – Opens the Configure Message Notification dialog box where you can configure when and where you are notified of new messages.

Find Me Call Handling:

You can use Find Me call handling to allow callers who reach your voice mailbox to try and find you at alternate numbers by pressing "1" during your outgoing greeting.

Note: There is no prompt instructing the caller on this option. You must inform callers of this option in advance or in your recorded greeting.

When the callers press 1, they hear a prompt telling them that the Find Me destinations are being called. If the call is not accepted at either of the Find Me destinations, the call is sent to your voice mail.

- 1. Specify up to two alternate numbers where you want callers to be able to find you.
- 2. Set the number of rings (6 second intervals) that Find Me call handling will wait for an answer at each destination.



Note: You can enable/disable Find Me call handling for each of the 5 call handling modes.
When a call is forwarded to a Find Me destination, the phone at the Find Me destination displays the caller ID of the voice mail. When you answer the call, you hear a prompt announcing who the call is for and the original caller ID.
You are prompted with the following options:
- Press 1 to accept the call.
 Press 2 to send the call back to the original voice mail box.
- Press 3 to repeat the name and caller ID.
<u>Call Handling Note:</u> This is the place to enter special instructions for your personal assistant when responding to incoming calls.
6. Click the OK button twice to complete the configuration and close the dialog boxes.



Task

Recording a Greeting for a Call Handling Mode

Call Forwarding Condition C Always When No Answer or Busy C Never Call Forwarding Destination Forwarded to Voice Mail - 101 when busy; Forwarded to Voice Mail - 101 after 3 mgs Edit Destination Greeting Personal Assistant O Forwarded To:	
C Always When No Answer or Busy When No Answer or Busy Call Forwarding Destination Forwarded to Voice Mail - 101 when busy; Forwarded to Voice Mail - 101 after 3 rings Edit Destination Greeting Personal Assistant O Forwarded To:	
When No Answer or Busy Never Call Forwarding Destination Forwarded to Voice Mail - 101 when busy; Forwarded to Voice Mail - 101 after 3 rings Edt Destination Greeting Personal Assistant O Forwarded To:	
C Never Call Forwarding Destination Forwarding to Voice Mail - 101 when busy; Forwarded to Voice Mail 101 after 3 mgs Edit Destination Greeting Personal Assistant 0 Forwarded To:	
Call Forwarding Destination Forwarded to Voice Mail - 101 when busy: Forwarded to Voice Mail - 101 after 3 mgs Edit Destination Greeting Personal Assistant 0 Forwarded To:	
Forwarded to Voice Mail - 101 when busy; Forwarded to Voice Mail - 101 after 3 rings Edit Destination Greeting Personal Assistant 0 Forwarded To:	
Edt Destination Greeting Personal Assistant 0 Forwarded To:	
Greeting Personal Assistant 0 Forwarded To:	
Personal Assistant 0 Forwarded To:	
Personal Assistant 0 Forwarded To:	
0 Forwarded To:	
Notification	7
IV Enable Calling Message Notification Edit Notification	
Find Me	٦
Enable Find Me	
Call Handling Note	
	٦
OK Cancel Apply	
Propert Decorder	
Record your greeting	
Stop Play Record	
OK Cancel	

Step-by-Step Instructions

You can record specific greetings for each of the Call Handling Modes. If you record a greeting for only one of the modes, it is only used when call handling mode is set for that mode. When there is no recorded greeting for a mode, the ShoreTel system announces your recorded name and the standard greeting for that mode.

From the Personal Call Manager Compact view:

- 1. Right-click the ShoreTel icon. S A shortcut menu appears.
- 2. Click the **Configure ShoreTel System** option. The ShoreTel System dialog box appears.
- Click the Edit Call Handling Modes button. The Configure Call Handling Modes dialog box appears.
- 4. Click the tab of the Call Handling Mode you want to configure.
- 5. Click the **Review/Record Greeting** button. The Prompt Recorder dialog box appears.
- 6. Click the **Record** button and record your message.
- 7. Click Stop when you complete your message.
- 8. Click **Play** to review your message.
- 9. Click the **OK** button three times to close each of the dialog boxes.



Task	Step-by-Step Instructions
Configuring Message Notification	From the Personal Call Manager Compact view:
Configuring Message Notification ShoreTel System Telephony <	 From the Personal Call Manager Compact view: 1. Right-click the ShoreTel icon. A shortcut menu appears. 2. Click the Configure ShoreTel System option. The ShoreTel System dialog box appears. 3. Click the Voice Mail tab. 4. In the Voice Mail Notification section, click the Edit Notification Settings button. The Configure Message Notification dialog box appears. 5. Select the desired options for receiving message notifications. What type of messages you want to be notified about. Phone number where you want to be called. How many times and how often voice mail should try to notify you of new messages. 6. Click OK to save settings. Note: Your next voice mail or e-mail message will respond to your new settings.
Try every 120 🚎 minute(s)	
Integrating Outlook with Personal Call Manager	If you choose to integrate MS Outlook with Personal Call Manager, all your voice mail messages appear in your Outlook Inbox, making it easy to retrieve and respond to messages in any order. With integrated voice messages, you can also forward voice mail to any e-mail destination, giving you the power of multi- media messaging.
	Before you can take advantage of integrating Personal Call Manager with Outlook, you must install the Outlook integration features.



Task	Step-by-Step Instructions
Configuring Outlook for Voice Mai ShoreTel System Voice Mai Voice	 Personal Call Manager can be configured to integrate Outlook and voice mail. With this integration, your voice messages will appear in your Outlook inbox. <u>From the Personal Call Manager Compact view:</u> Right-click the ShoreTel icon. A shortcut menu appears. Click the Configure the ShoreTel System option. The ShoreTel System dialog box appears. Click the Outlook tab. Click the Use Outlook as my default Voice Mail client option. Click OK. Note: Depending on your configuration in the ShoreTel System/Voice Mail settings, the
	ShoreTel system will either ring your telephone or play your voice mail messages through your PC speakers.
Including Outlook Contacts in Your Calling Directory	You can configure Personal Call Manager to include Outlook contacts when you make calls, conference calls, or transfer calls.
ShoreTel System X Telephony Voice Mail Outlook Settings Login and Passwords Voice Mail With Outlook is currently Uninstall Voice Mail Utions with Outlook is currently Uninstall Vise Dutlook as my default Voice Mail client Voice Mail Uninstall Vise Dutlook as my default Voice Mail client Voice Mail to Message when Moved Delete Voice Mail from Message when Moved Delete Voice Mail from Message when Moved Calendar The ShoreTel Calendar Form to schedule Call Handling Memorized Phone Number Management Install Vise ShoreTel Calendar Form to schedule Call Handling Pop Dutlook contacts on incoming call Pop Dutlook contacts on incoming call Don't include FAX numbers (affects ShoreTel directories as well) Use Company Names in QuickDialer More Options DK Cancel Apply	 Note: Once configured, Personal Call Manager displays only the contact folders with the word "Contact" in the folder's name. <u>From the Personal Call Manager Compact view;</u> Right-click the ShoreTel icon. A shortcut menu appears. Click the Configure ShoreTel System option. The ShoreTel System dialog box appears. Click the Outlook tab. In the Memorize Phone Number Management section, click Read phone numbers from Outlook on startup option. Click OK.



Step-by-Step Instructions Task You can display Outlook contact information when you **Displaying Outlook Contact** receive or make calls. Contact Information from Information for Incoming Calls Outlook will be displayed if the caller is in your Outlook 👼 ShoreTel System x contact list. Telephony | Voice Mail Outlook | Settings | Login and Passwords | Voice Mail Voice Mail integration with Outlook is currently installed. Uninstall... From the Personal Call Manager Compact view; 🔽 Use Outlook as my default Voice Mail client Right-click the ShoreTel icon. 🧐 A 1. Attach Voice Mail to Message when Moved ☑ Delete Voice Mail from Message when Moved shortcut menu appears. 2. Click the Configure ShoreTel System option. The ShoreTel System dialog box 🔲 Use ShoreTel Calendar Form to schedule Call Handling appears. Memorized Phone Number Management Read phone numbers from Outlook on startup 3. Click the Outlook tab. Pop Outlook contacts on incoming call 4. In the Memorize Phone Number Don't include FAX numbers (affects ShoreTel directories as well) Management section, click Pop Outlook 🔲 Use Company Names in QuickDialer contacts on incoming call option. More Options... Show Import Log... Click OK. 5. Cancel OK