

Phone Manager Quick Reference Guide

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QUICK REFERENCE GUIDE



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Quick Start

The guide provides information for frequently used features. For more information about these and other features, refer to the user guide.

The image shows two screenshots of the Mitel Phone Manager interface. The top screenshot displays the main dashboard for user Martin Harris, and the bottom screenshot shows a call banner for Joe Bloggs.

Device Selection
Easily swap between extensions and control Hot Desk status if applicable

Device Control
Control DND, FWD and Hunt Group status. Also gives access to Voicemails, Chat and the Dial Pad

Contacts View
Real-time view of users, extensions and agents throughout the organisation

Business Units
Centrally configured views of departments and teams

Settings & Preferences
Access to application configuration including Hot Keys and CRM integration

Search or Dial
Enter a number to dial or search personal and global directories

Call History
Call log of all inbound, outbound and internal calls

Favourites
Build up a favourites list of contacts by selecting users from existing views or search results

Volume Control
Increase/decrease alerting or in call volume and toggle mute status

Call Banner
Visible whenever a call is in progress or ringing at the extension

Call control
Use the call control functions to clear, hold/retrieve or transfer the call.






Dial pad
Use this icon to access the dial pad if you need to enter DTMF Tones on a call

Call details
The main body of the toaster shows details about the current call

Contacts View

The contacts tab within Phone Manager provides a real-time view of information about other devices including users, extensions, agents, speed dials and hunt groups. This gives an overview of the status of these devices and call control features such as single click to dial.

The views available include a personal favourites view and centralized business units that have been configured on the server. Use the binder icon to hide or show different views.

Icons	Description
	User icon, an outlined icon means the user does not have Phone Manager running
	Extension icon
	Agent icon
	Global or Personal Directory
	System Speed Dial Directory

Making Calls

Making calls using Phone Manager is a simple process and can be achieved in a number of different ways:

- Dial a number you know by entering it into the Search or Dial box and press enter
- Dial a user or device from the Contacts window by double clicking or pressing the dial icon next to it
- Search the directory by entering a name in the Search or Dial box to find a number to dial
- Highlight a number in a different application and double click the Highlight & Dial icon which can be found on the right hand side of you screen








Using the Call Banner

If there are any calls at the extension then the Call Banner will appear, this provides control for features such as Hold/Retrieve, Transferring, Answering and Clearing calls. If there is more than one call at the extension the banner will expand to display the different calls and provide a means to swap between them.

















Transferring Calls

Calls can be transferred by using the buttons on the call banner. The main Phone Manager Search or Dial or the Contacts Window should be used for choosing the transfer destination. If a call is in progress, dialling a number using any of the make call methods described above will automatically setup a consultation transfer.

Call Banner

Button	Action
 Answer call	Answers an inbound ringing call
 Clear call	Clears a connected call
 Hold Retrieve	Toggles a connected call between hold and connected state
 Divert voicemail	Offers the ability to divert an inbound call to voicemail or chosen destination
 Transfer Consult	Provides the ability to setup a direct transfer or consultation call
 Complete Cancel	When performing a consultation transfer, these buttons can be used to complete or cancel the transfer
 Mute	Used to toggle the mute state of a connected call

Application Buttons

Button	Action
	DND, provides control of do not disturb status and displays the current status
	ACD*, provides control of ACD Hunt Group status and displays the current status
	UCD*, provides control of UCD Hunt Group status and displays the current status
	Voicemail, provides access to voicemail boxes that notify the local extension and indicates how many messages are waiting
	Dial Pad, provides access to the Dial Pad which can be used to initiate calls or more commonly to dial DTMF Tones over an existing call
	Forward, provides control of the forward state of the local extension and displays the current status
	Provides access to the Chat window and to see existing conversations
	Binder, controls visibility of different Contact views
	Can be used to add new contacts to personal or global directories
	Used to switch the view on the Contact window between large icon and details view
	Mute, controls the mute status of the local extension when a call is in progress
	Volume controls, used to change the alerting volume when idle and the call volume when a call is in progress
	Settings, provides access to the setting area of the application to change things like Hot Keys, CRM integration and personal preferences
	Hot Desking Toggle, if the associated extension is a Hot Desk Profile then this toggle switch will display to control and display Hot Desk status
	Toolbars*, if the associated extension is a Hot Desk Profile then this toggle switch will display to control and display Hot Desk status
	Campaign Manager*, if the associated extension is a Hot Desk Profile then this toggle switch will display to control and display Hot Desk status



















* This icon will only appear when licensed and/or when configured to appear by an administrator.






Call History

The Call History window shows all internal, external and missed calls on all of your assigned devices.

When the Call History window is not open, any missed calls will be notified with a red circle on the tab. Calls can be returned by pressing the handset icon.

A history of any calls made to or by any of the devices associated with your user account will be displayed. To see additional information regarding calls expand the Phone Manager application to full screen.

Contacts		Call history 3	
	Number	Time	Talk time
  	John Smith	12:07	09:58
  	Amanda Johnson	10:53	00:00
  	Steve Dixon	10:38	00:00
  	Kitchen	10:26	13:26
  	Sales Room	10:07	00:00
  	Mitel Office	09:52	08:19
  	1841	09:52	00:12
  	Barry Marsdon	09:49	01:19

Button	Action
	Inbound call that was answered
	Inbound call that was missed
	Outbound call
	Redial, used to call back a number on the call history. If this icon is greyed out there is no number available to redial
	Playback**, used to playback a recording of external calls

** Only available in conjunction with a Xarios Call Recording solution



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