

Phone Manager Quick Reference Guide

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QUICK REFERENCE GUIDE



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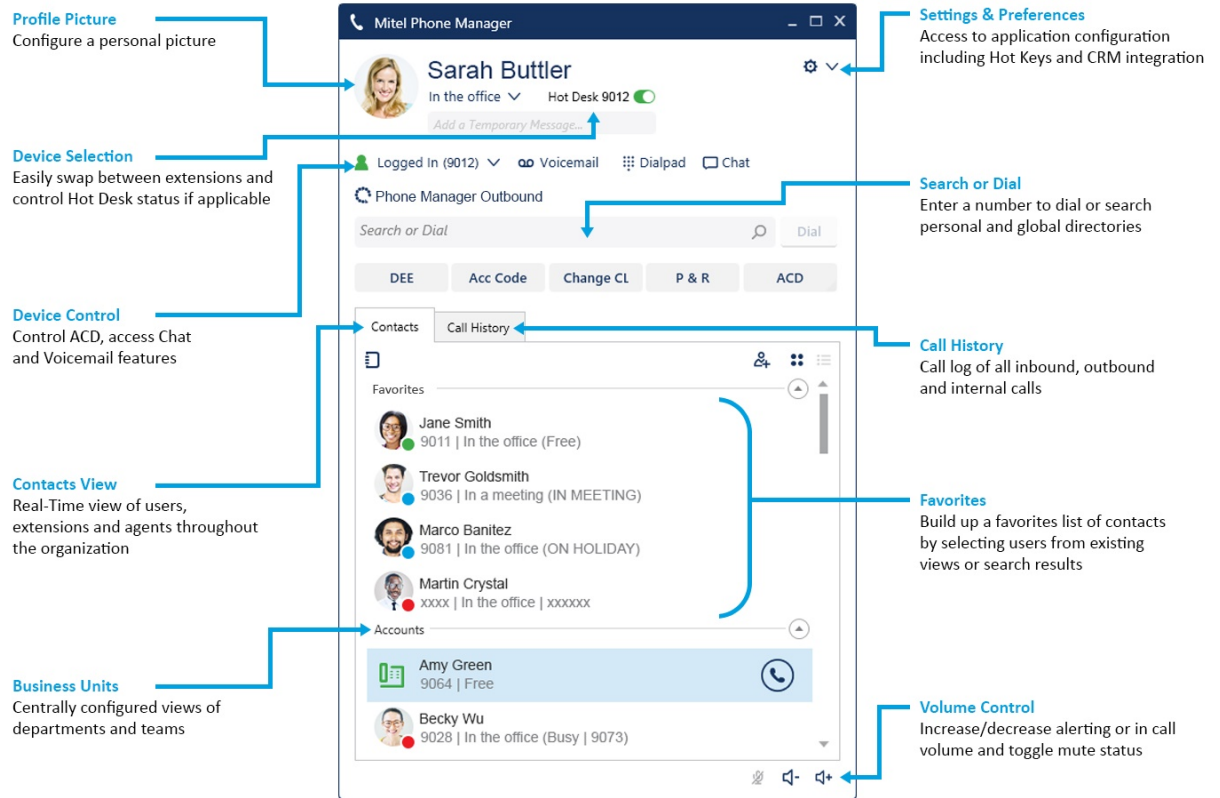
Mitel Phone Manager
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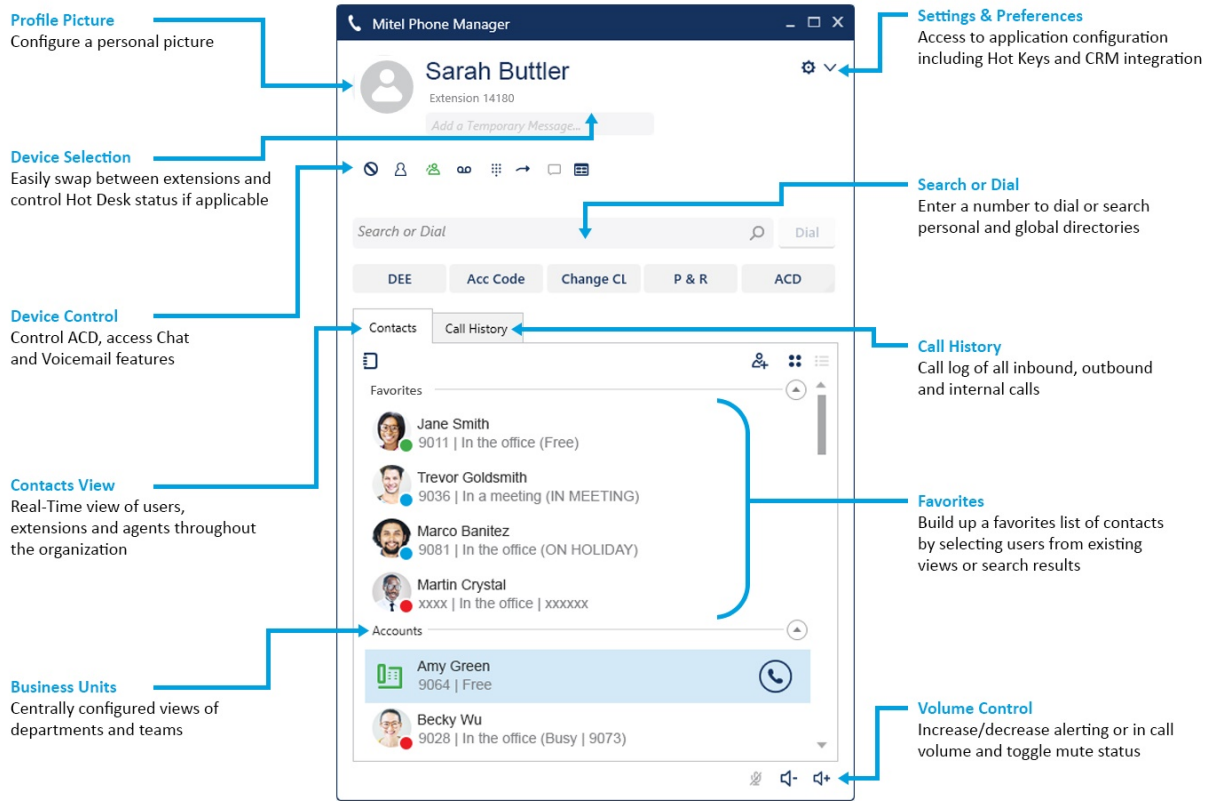
Quick Start

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

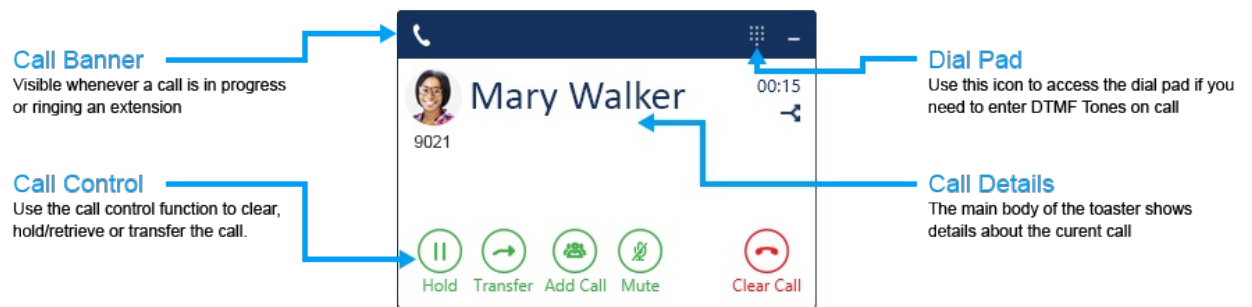
Phone Manager UI with Presence Profiles



Phone Manager UI without Presence Profiles














Phone Manager Call Banner



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.

Call Banner Buttons

| 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 |
|  Send to Divert voicemail | Offers the ability to divert an inbound call to voicemail or chosen destination |
|  Consult Blind | Provides the ability to setup a consultation transfer or a blind transfer |
|  Add Call Merge | Provides the ability to setup an ad hoc conference |
|  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 |
|  Pull Call | This button can be used to pull back a call that has routed through the telephone system to an external number (Home, Mobile etc..) |
|  | This button can be used to push a connected call out to another one of your devices |
|  | This icon will display when making outbound calls and the phone system is ringing multiple devices to find the person you are calling |

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

Transferring Calls

Calls can be transferred by using the Consult/Blind transfer buttons on the call banner. The main Phone Manager Search or Dial or the Contacts Window should be used for choosing the transfer destination. After pressing Consult/Blind on the Call Banner the main Phone Manager window will be brought into focus ready for you to enter a number to dial.

Alternatively, dialling a number using any of the make call methods described above when a call is in progress will automatically setup a consultation transfer without having to first press the Consult button on the Call Banner.

When performing a consultation transfer it can be completed or cancelled using the relevant buttons on the Call Banner or simply hand up to complete.








 Softphone calls cannot be completed until the remote end answers.

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 favorites view and centralized business units that have been configured on the server. Use the binder icon to hide or show different views.

| Icons | Description |
|---|--|
|  | <p>User icon, This icon appears on the Large view of the contact screen. The users status shows in the circle in the bottom right-hand corner. The user profile image will display in the large circle.</p> <p>If the user has no profile picture then the icons below will be used.</p> |
|  | <p>User icon, an outlined icon means the user does not have Phone Manager running</p> |
|  | <p>Extension icon</p> |
|  | <p>Agent icon</p> |
|  | <p>Directory Contacts (Global or Personal Directory, Phone System Directory, Outlook Directory)</p> |

Color Key: Gray - Offline, Green - Available, Red - Busy, Blue - Do not disturb, Yellow - Wrap up

A user who has privacy enabled may show xxxx in the extension and Caller ID fields.

Application Buttons

| Button | Action |
|---|---|
|  | Highlight & Dial, this icon can be found attached the right hand side of the desktop and can be used to dial numbers from other applications. Highlight a number to dial in another application and double-click the icon |
|  ** | 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*, launch one or more centrally assigned toolbars to help perform common telephony tasks |
|  | Phone Manager Outbound*, launch the client UI for MiContact Centre Phone Manager Outbound to make and disposition outbound dialer calls |

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

** These icons only appear when NOT using Presence Profiles.

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.

Right clicking on a history line allows you to add the contact to your directory.

| | Number | Time | Talk Time |
|--|-----------------|-------|-----------|
| | Seymore Skinner | 13:18 | 00:00 |
| | Hank McCoy | 13:18 | 00:00 |
| | Nelson Munce | 13:18 | 00:00 |
| | Jack Sparrow | 13:03 | 00:01 |
| | Bruce Wayne | 13:03 | 00:09 |
| | Jamie Lannister | 13:03 | 00:07 |
| | John Snow | 13:03 | 00:24 |
| | Clark Kent | 12:59 | 01:35 |
| | Peter Parker | 12:47 | 00:00 |

Icons

| Button | Action |
|--------|---|
| | Inbound call that was answered (<i>This includes calls answered by voicemail and in the case of DEE calls answered by other devices in the DEE group</i>) |
| | Inbound call that was missed |
| | Outbound call |
| | Redial, used to call back a number on the call history. If this icon is grayed out there is no number available to redial |
| | Playback**, used to playback a recording of external calls |

** Only available in conjunction with a MiVoice Office Call Recorder or Xarios Call Recorder



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