

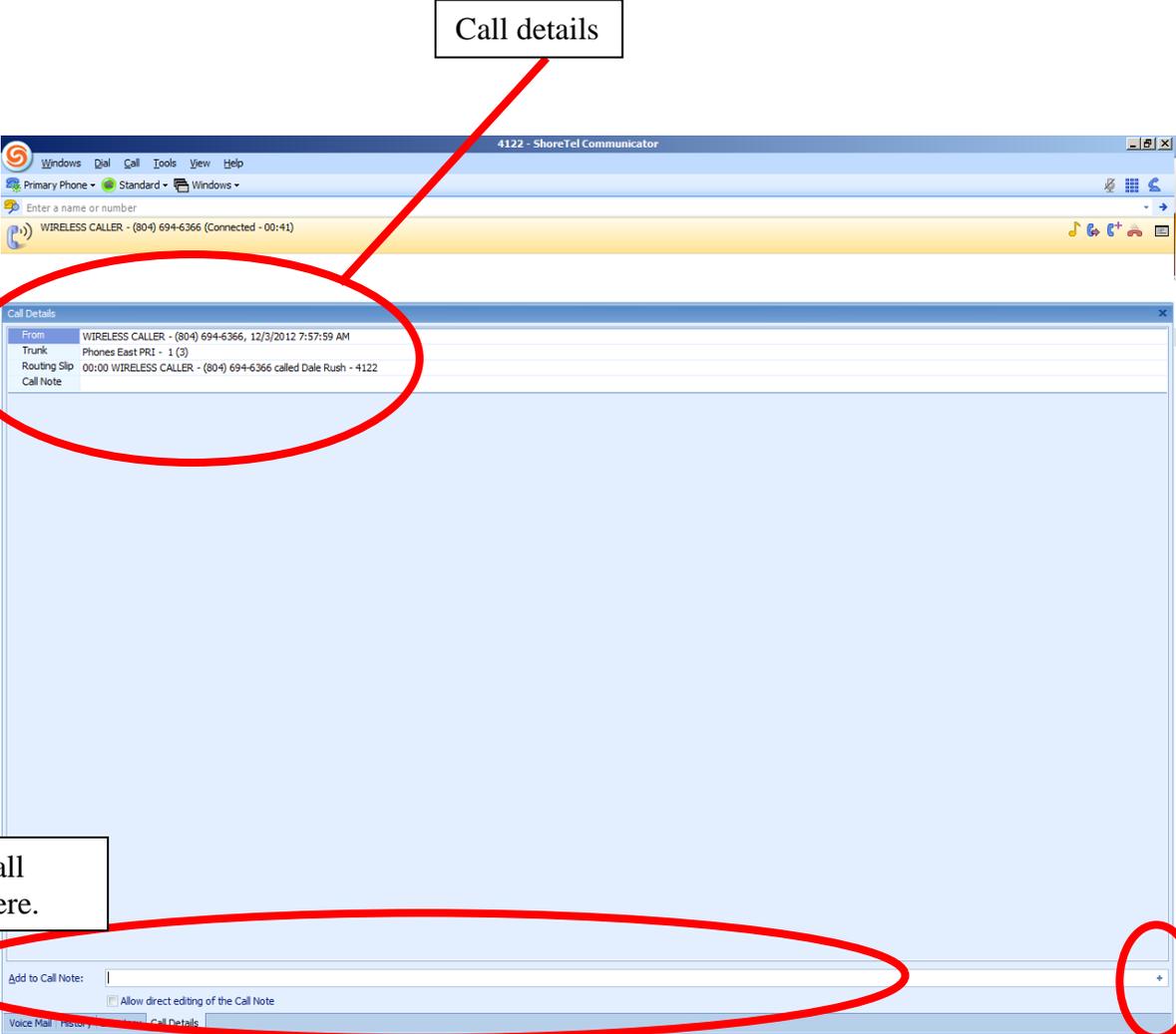
Notating Parent Contact Phone Calls Using ShoreTel Communicator

Entering Call Notes:

Call notes can be added in a couple of ways:

Method 1

While the call is active, click on **Call** and then on **More Info**. That causes the following dialog box to appear.



Call details

4122 - ShoreTel Communicator

Windows Dial Call Tools View Help

Primary Phone Standard Windows

Enter a name or number

WIRELESS CALLER - (804) 694-6366 (Connected - 00:41)

Call Details

From	WIRELESS CALLER - (804) 694-6366, 12/3/2012 7:57:59 AM
Trunk	Phones East PRI - 1 (3)
Routing Slip	00:00 WIRELESS CALLER - (804) 694-6366 called Dale Rush - 4122
Call Note	

Enter call notes here.

Add to Call Note: +

Allow direct editing of the Call Note

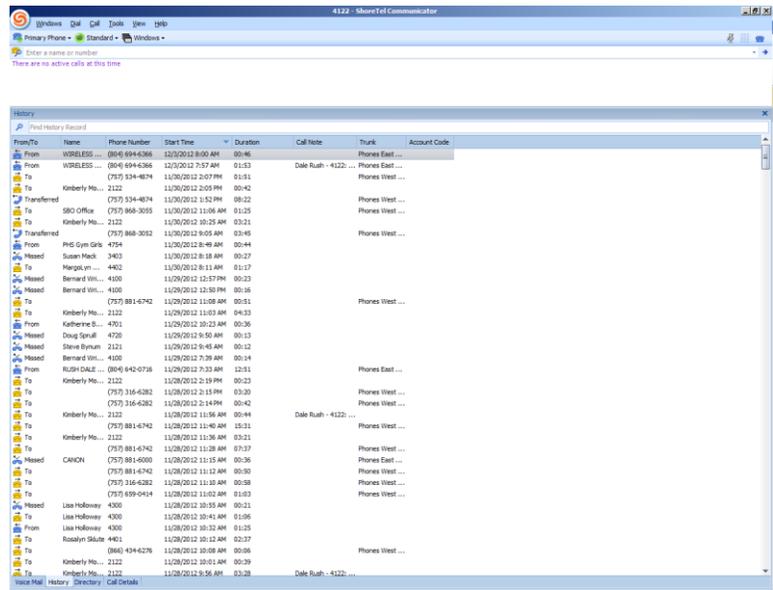
Voice Mail History Call Details

Press the “+” sign to accept the call notes. They then appear at the top in the call details area. You may add multiple notes to one call.

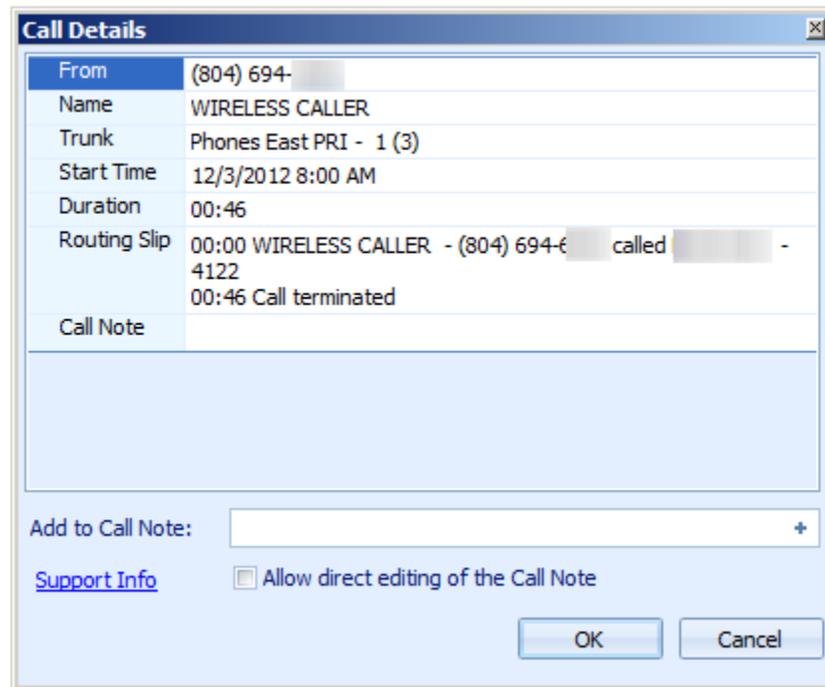
Method 2

Another way to enter call notes is after the call has ended.

1. With ShoreTel Communicator opened, click on **Windows** and then **History**.



2. Right-click on the desired call and choose **Properties**.
3. The **Call Details** window opens.



4. In the **Call Details** dialog box, enter the call notes and press the **+** sign to save those notes. Multiple notes may be added to one call.
5. Click **OK** to close the window after all notes have been entered.

To retrieve your call notes follow this process:

1. Open ShoreTel Communicator
2. Click on the **Windows** pull-down menu
3. At the drop-down, select **History**

At this point you have a couple of options:

- You can either view details of the selected call, or
- You may export a history of all calls to an Excel file

To view details of this call, follow these steps:

1. Right-click on the selected call
2. Choose the **Properties** option
3. View the **Routing Slip** area for technical details of the call
4. View the **Call Note** area for notes you have entered regarding the call
5. Click **OK** to close the dialog box

To export a history of calls made, follow these steps:

1. Right-click on any call
2. At the pop-up menu, select **Export History**
3. After a few seconds delay, your call history appears as an editable Excel file
4. Manipulate the data and fields as shown