

How to Create a Workflow in ShoreTel Director

Instructions

Follow these steps to create a Workgroup with a dedicated DID number.

- 1 Open ShoreTel Director
- 2 Select 'Administration'
- 3 Select 'Workgroups'
- 4 At the top, select 'Add New'
- 5 Name the Workgroup
- 6 Select 'DID Range'
- 7 Your DID Number will populate
- 8 **User Group:** *(Required)* The User Group drop-down list is for selecting a user group. The workgroup must inherit permissions from the User Groups COS (Class of Service) because workgroups have access to some telephony features, such as Call Forward External, and some voice mail features, such as Incoming Message Length and Message Notification.
- 9 **Mailbox Server:** *(Optional)* A workgroup can have a mailbox on its associated server.
- 10 **Include in System Dial By Name Directory:** Allow the workgroup to be in Auto-Attendant dial-by-name directory.

11 Workgroup Membership: *(Required)* The Edit Agents button activates the Workgroup Membership page. For the current workgroup, you can add or remove an agent. You can also change the call distribution pattern of agents in this page.

12 Distribution Pattern: *(Required)* This parameter specifies how ACD distributes calls to agents in the group when a call enters the ShoreTel network:

- With Top Down, ACD begins at the beginning of the active agent list.
- With Round Robin, ACD selects the next available agent in the list.
- With Simultaneous, all available agents receive the call simultaneously.

13 Call Forward: *(Required)* The radio buttons in the Call Forward area are for specifying when and where the system forwards a call.

14 Click Save

Need Help?

Contact our expert support team by calling **855.9.INFLOW** today!