

How to Make a Basic Workgroup

Without Licensing, and permanently log someone in

ShoreTel 14.2 or previous

- 1 Navigate to Administration > Workgroups
- 2 Create a new Workgroup
- 3 Assign the Primary extension and a Backup Extension
- 4 Assign DID if any
- 5 Assign Schedule (if any) and Save the new Workgroup

Edit this record	Refresh this page
Name:	<input type="text" value="Workgroup A"/>
Extension:	<input type="text" value="2500"/>
Backup Extension:	<input type="text" value="1700 : Default"/> <input type="button" value="Search"/>
Workgroup Server:	<input type="text" value="Headquarters"/>
<input type="checkbox"/> DID Range:	<input type="text" value="View System Directory"/>
DID Number:	<input type="text"/>
DNIS:	<input type="button" value="Edit DNIS Map"/>
User Group:	<input type="text" value="Voice Mail Notification"/>
<input checked="" type="checkbox"/> Mailbox Server	<input type="text" value="Headquarters"/> Escalation Profiles and Other Mailbox Options
Language:	<input type="text" value="English(US)"/>
<input checked="" type="checkbox"/> Accept Broadcast Messages	
<input checked="" type="checkbox"/> Include in System Dial By Name Directory	
<input type="checkbox"/> Make Number Private	
Recorded Name:	<input type="button" value="Record"/> <input type="button" value="Play"/> <input type="button" value="Erase"/> <input type="button" value="Import"/> Go to preferences
Voice Mail Password:	<input type="text" value="...."/> Confirm: <input type="text" value="...."/>
<input type="checkbox"/> Enable Automatic Agent Logout on Ring No Answer	
Workgroup Membership:	<input type="button" value="Edit Agents"/>
Workgroup Queue Handling:	<input type="button" value="Edit Queue Handling"/>
Wrap Up Time:	<input type="text" value="0"/> Seconds
Current Call Handling Mode:	<input type="text" value="On-Hours"/>

▼ On-Hours ▶ Off-Hours ▶ Holiday ▶ Custom

Escalation Profile: <None> ▼ [Edit this profile](#)
 Schedule: <None> ▼ [Edit this schedule](#)

Call Handling:
 Distribution Pattern: Top Down Round Robin Longest Idle
 Simultaneous

Call Forward: Always No Answer/Busy

Always: Extension:
 External: (e.g. 9+1 (408) 331-3300)

Busy: Extension:
 External: (e.g. 9+1 (408) 331-3300)
 Queue

No Answer: Extension:
 External: (e.g. 9+1 (408) 331-3300)
 Queue

Logged Out: Extension:
 External: (e.g. 9+1 (408) 331-3300)
 Queue

Rings per Agent:
 No Answer Number of Rings:

Mailbox:
 Workgroup Greeting: [Go to preferences](#)
 Workgroup Assistant:

Enable Message Notification

6 Click *Edit Agents*

Enable Automatic Agent Logout on Ring No Answer

Workgroup Membership:

Workgroup Queue Handling:

Wrap Up Time: Seconds

Current Call Handling Mode:

7 Your DID Number will populate

Workgroup Membership [Help](#)
 Edit Workgroup A's Membership * modified

[Edit this record](#) [Refresh this page](#)

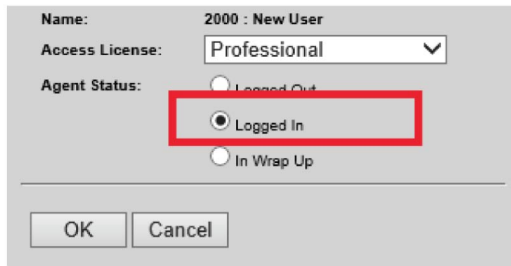
Filter Users By:
 First Name: Last Name: Extension:
 Sort By: First Name ▼

Select Agents From List:
 Show Page: 1 : Inflow Admin - New ▼ < >

1115 : Inflow Admin	<input type="button" value="Add >>"/> <input type="button" value="<< Remove"/> <input type="button" value="Move Up ^"/> <input type="button" value="Move Down v"/>	2000 : New User
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Hint: Double click user in the right box if you need to change his Logged In status

8 Once moved - Double click the agent and select the **Logged In** radio button.



9 Click **OK** to save the setting

10 Click **Save** to confirm the changes to the Workgroup Agent List

Need Help?

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

ShoreTel Connect

- 1 Navigate to Administration > Features > Workgroups
- 2 Click **New**
- 3 Enter a Workgroup Name
- 4 Assign the Primary extension and a Backup Extension
- 5 Assign DID if any
- 6 Assign a Schedule on the **Routing** tab if one is needed

New Workgroup

GENERAL ROUTING VOICE MAIL MEMBERS QUEUE HANDLING DNIS

Name:

Extension:

Backup extension:

Include in System Dial by Name directory

Make extension private

DID Settings: (not configured) [change settings...](#)

User group: [View user group](#)

Server:

Language:

Enable mailbox

Mailbox server:

Workgroup name:

Enable automatic agent logout on ring no answer

Wrap up time: seconds

New Workgroup

GENERAL **ROUTING** VOICE MAIL MEMBERS QUEUE HANDLING DNIS

ON-HOURS OFF-HOURS HOLIDAY CUSTOM

Schedule: [View schedule](#)

Distribution pattern:

- Top Down
- Round Robin
- Longest Idle
- Simultaneous

7 Click **Save**

8 Click the Members tab and Move desired Agents from the **Available** box to the **Selected** box

New Workgroup

GENERAL ROUTING VOICE MAIL MEMBERS QUEUE HANDLING DNIS

Available:		Selected:	
EXTENSION	NAME	EXTENSION	NAME
3500	Test User	3500	Test User

>
<
^

9 Click **Save**

10 Click on each Agent in the right hand box and change their state to **Logged In**

11 Click **Save**

Selected:

EXTENSION	NAME
3500	Test User

Select agent state:

- Logged Out
- Logged In
- In Wrap Up

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