CLOUD SERVICES PORTAL

User Guide

In This Guide

Welcome

Welcome to your new voice services management portal.

This reference guide is a convenient, go-to resource for individual Users, Supervisors, and Administrators just getting started with the **Cloud Services Portal** for online account feature and service management at the User level. This guide provides an overview of the application website sections that may be available to you within the Portal and offers instructions and tips for setup and maintenance of the communication services it provides.

It should be noted that services and features are permission and license-based. This guide describes all of the features and tools that _can be_ offered and provides example views of the site which may not match the colors or logos displayed to you in your portal, and some services or settings may not be available to you. Some features or sections described here may not be included with every subscription type or offered to all users.

Please contact your service provider with questions or requests for more information about the features and services that are available in your subscription.

We encourage you to take some time to review this document and keep it handy for future reference.

Portal Introduction

The Cloud Services Portal makes it easy for voice service subscribers to customize and manage account information and feature settings online.

Sign In

To Access the Cloud Services Portal:

1. Open a web browser (Chrome, Mozilla, Explorer, etc.) and enter the URL (web address) provided to you for online account management.

   Example: https://portal.driveUC.com/

2. Enter your Username (xxxxxxxx@domain.xx) and Password credentials, as requested.

3. Click the Sign In button and the Cloud Services Portal opens.

   If available, the Forgot Password? link may be used to retrieve your portal sign in credentials via email.
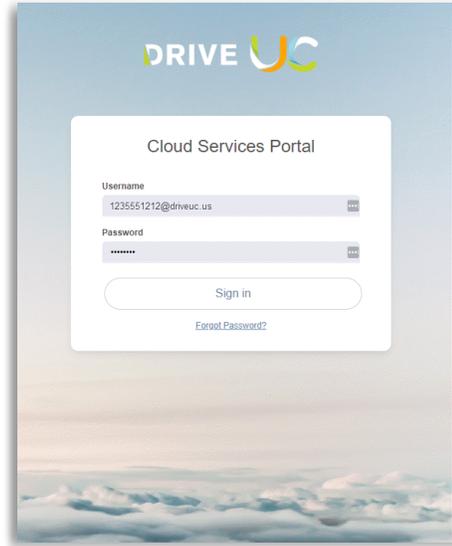
Terms & Conditions

The first time a user accesses the portal they are presented with an E911 Dialing Terms and Conditions acknowledgment dialog that must be completed to proceed.

1. Use the tools to review or save the document, as desired.

2. Click to place a check in the acknowledgment check box.

3. Click the Save button to submit and close the dialog.

Note: *Once reviewed, acknowledged, and Saved, this dialog will not be presented at login again unless the Terms and Conditions are updated.*
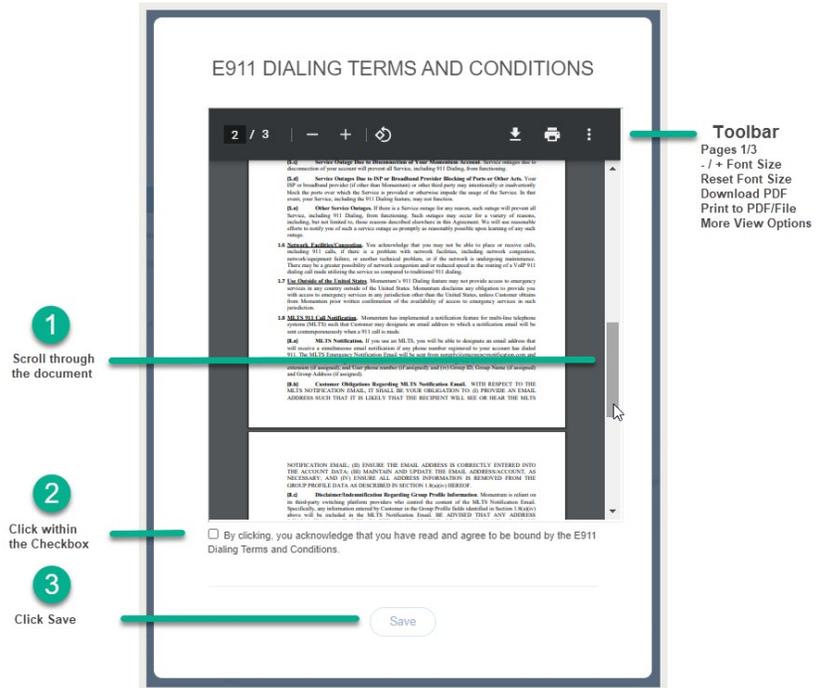
Once you have signed into the Cloud Services Portal and acknowledged the terms and conditions when presented, access to the tools and features you need to easily manage your communications features are right at your fingertips.

Site Tour

All *Cloud Services Portal* users will see the My Services Dashboard when the portal opens. This is the user's Home page within the portal, offering an up-to-date view of your profile, call logs, voicemails, and quick access links to all of your voice services setting management tools.

Your subscription, account type, and/or role determines the features and services displayed to you within the portal. Helpful information is offered throughout every section of the portal to make it easy for users of all levels to manage accounts and settings. The following site tools and pages are available to all users:

Quick Access Tools

The **Hi, <Name or Phone#> ▶** drop-down menu (top right) offers direct links to:
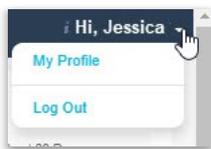
❖ My Profile – View and edit (if authorized) the account Profile information.
❖ Log Out – Exit and return to the Cloud Services Portal Sign In page.

Menu

The panel on the left offers direct menu access to areas the user may view.
These options can include:
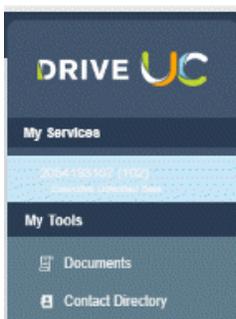
➢ Logo – The logo image offers a quick link back to the Dashboard / Home Page for a selected account.

➢ My Services – Access to the My Services Dashboard for any line(s) and extensions included on an individual account. Clicking on a listing opens the dashboard for that item.

➢ My Tools – Access to the Documents section to view any guides and references offered to users by the provider and the enterprise-level Contact Directory. to view a read-only list of any contacts entered.

My Services Dashboard

The My Services Dashboard is the Home page. It displays important account information and offers quick access to manage features and settings for individual accounts. All the tools and features within or related to the account are accessible from this page. The feature section widgets (cards) on the Dashboard provide easy access to related information and tools for managing account settings.
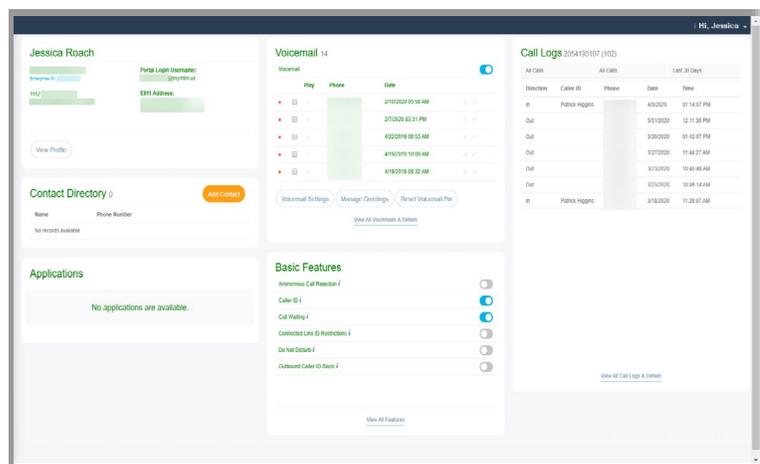
*For your security, the connection to the portal will automatically close
and return to the Sign In page when idle for more than 10 minutes.*

My Tools

Documents

The Documents page provides a searchable list of user guides and other helpful resources that are added by the Provider. This section is optional and will only display documentation if the provider has added any.

- ➢ The Search field within the page offers a useful functionality to locate terms, specific titles, or portions of description text within
  the lists, if there are multiple pages of listings.
- ➢ The column headers in the *Additional Resources*
  section can be clicked to use an ascending/ descending alphanumeric sort function.
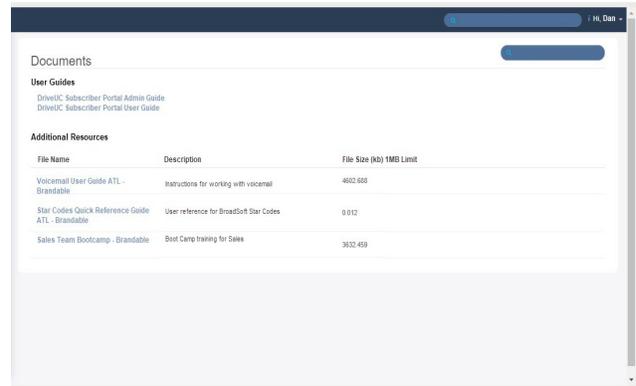
Download a Document

- ❖ Click on a **Document Title** within one of the lists to download the selected file to the *Downloads* folder on your PC. The file name displays within a Windows *Download* tab below the Application at the bottom of the browser window for easy access.

- ❖ Click on the '*Downloaded File'* tab at the bottom of the browser window to open the file for review or edit (where brandable), and/or to **Save** the file to a local folder or computer drive for print or digital distribution.

Contact Directory

Users may review any listings that may have been added in the Enterprise-level Custom Contact Directory, which displays to them on their phones as the Common Directory.
The View button opens the adjacent item for further review in a read-only dialog.

Account Management

Dashboard Sections

❖ Profile - This dashboard section widget (card) displays your profile information and links to the View Profile page where access to manage your profile settings, password, e911 features, and notification email addresses is provided.

❖ Call Logs – This card offers the recent Call Log history and links to a view of up to 1000 incoming and outgoing calls over the past 90 days.

❖ Voicemail – This card displays recent messages and links to the Voicemail Settings and lists for easy access to manage your voicemail and messaging features.

❖ Contact Directory – This card allows the user to add and manage up to 99 custom contact directory listings/speed dials for their hosted phone within the system

❖ Applications – This card provides helpful links to the Sign In or landing pages of any add-on modules or applications on your account.

❖ Basic Features – This card offers quick access to your On / Off settings and a link to the Settings page where management tools for additional features and services are provided.

Profile
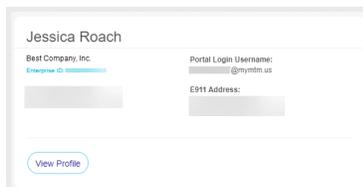
This section of the dashboard displays a summary of your account profile information (Name, Address, Phone Number, User ID, Device model, etc.), and provides links to set up a temporary e911 location, review the entire profile, and access your password and profile management tools.

The My Profile link found in the toolbar (the drop down by your username) also offers another access point to view the Profile.
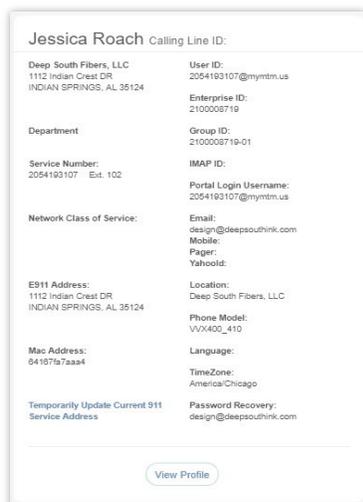
The following features and access links are all provided via the Profile card on the My (User) Services Dashboard:

View Profile

 Click on the View Profile button to review your current contact information and access the management tools for your password, email notification settings, and temporary e911 location changes.

Secondary links to Edit Profile, Change Password and other setting tools are also included in the View Profile view.
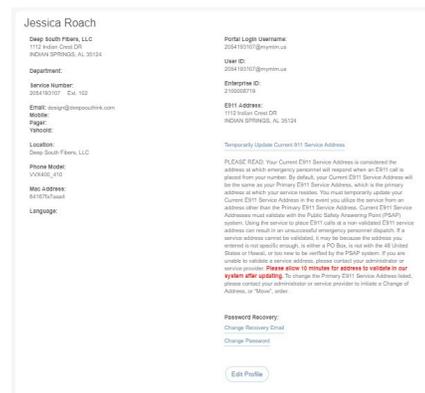
Change e911 Address (Temporary)

The Temporarily Update Current 911 Service Address link opens the dialog that allows the user to add and validate temporary e911 Service Address locations for use when traveling to different locations with the associated device. You must temporarily update your e911 Service Address in the event you may need to utilize the service from an address other than the Primary e911 Service Address, and then reset it back to the Primary e911 Service Address upon your return.

Note: *Any time a user changes the e911 address on their profile - either Temporary or Primary - there may be fees incurred for the organization and the System Admin will receive an email notification when changes are made to this data.*

Add a Temporary e911 Service Address

1. Click on the Temporarily Update Current 911 Service Address link to begin.

2. Enter the complete Address information for the temporary address you wish to use in the fields provided - *include specifics like building, department, floor, N/S/E/W, etc. information to provide a Dispatchable Location that can be sent to the PSAP to help emergency responders find the specific location of the call's origination quickly during an emergency.*

3. Click on the Save button to submit the information. You will receive a Success! message when the address confirmation process through the PSAP system is completed.

Please allow up to 10 minutes for the address to validate after updating. If the address could not be validated, it may be because the information is not specific enough, is for a PO Box, is not within the continental United States, Puerto Rico, or Hawaii, or is too new to be verified by the PSAP system.

If you are unable to validate a service address, please contact your Administrator or the Service Provider for assistance.

Edit Primary e911 Service Address

By default, your e911 Service Address is the primary address of record for your service account. If a change is required, or more information needs to be added to include Dispatchable Location information in the Primary Service Address, please contact your Administrator or the service provider to initiate a Change of Address (or "Move" order) to change the Primary E911 Service Address permanently.

Reset to Primary e911 Service Address

1. Click on the Temporarily Update Current 911 Service Address link in the View Profile dialog.
2. Click on the Reset to Primary link to return the address to the default address.
3. Click on the Save button to submit the change and receive a Success! message when it is completed.

Change Recovery/Notification Email

1. Click the Change Recovery Email link to open the Change Email dialog.

2. Password Recovery Email: Enter or change the email address on file for recovering your login information.

3. Service & CPNI Email Notifications: Enter or change the email address on file for receipt of notifications from the provider.

4. Click on the Save button when your edits are complete.

Change Password

The Change Password link provides direct access to update your unified communications password information.

1. Click on the Change Password link.

2. Type a new Password.

3. Retype to verify.

4. Click the Save button.

   New passwords must include 8 or more characters and contain at least 1 number or special character, 1 lower case letter, and 1 upper case letter.

Edit Profile

The Edit Profile button provides access to modify additional profile contact information. The information you include (mobile phone, email, etc.) is visible to other group members when viewing the directory or phone list.

In View Profile:

1. Click the Edit Profile button to view/edit the following options:
   - ❖ Preferred Name (First/Last)
   - ❖ Preferred Name when dialing out (First/Last)
   - ❖ Work Information (Title, Department)
   - ❖ Language preference
   - ❖ Time Zone
   - ❖ Class of Service
   - ❖ Additional Contact Information (phone, email, personal address)

2. Click the Save button when you are finished to update the data.

   An Administrator is needed to modify some of the Profile information.
   Contact your Administrator for assistance with the settings you cannot modify.

Additional Profile Settings

Access to additional profile settings for the directory and monitoring services is provided in the Settings page.

See Also: Profile (in Settings).

Applications

The Applications card in the Dashboard displays links to any additional applications related to the account. The Cloud Services Portal offers an easy way to connect directly to the sign in or landing page of the corresponding service or application in this section of the Dashboard.

1. Click on the Connect link to open the sign in or landing page of the corresponding option in a new browser window.

Applications	
Call Analytics	Connect
Call Recording	Connect
Call Reporting	Connect
Collaborate	Connect

Applications
No applications are available.
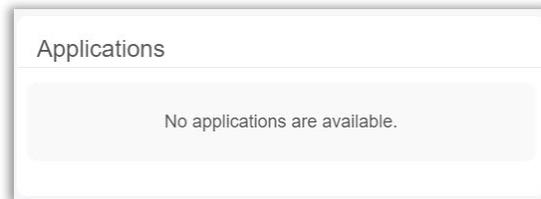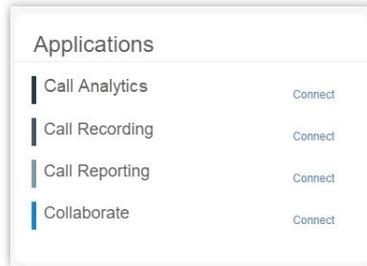
If no additional applications are included with the service, this card displays a simple "No applications are available." message. Contact your administrator for assistance if you require assistance to access or log into any add-on modules on your account.

Contact Directory

The Contact Directory card offers the option to create and manage custom contact listings for a hosted phone connected to the account. Users may manage these custom contacts as usual via the phone or here in the portal. The data syncs at scheduled times.

Contact Directory 0		Upload Contacts	Add Contact
Name	Phone Number		
John Freddy	1234567890	✎	🗑
Tedd Smith	4567891212	✎	🗑
Tommy Smith	5674321000	✎	🗑
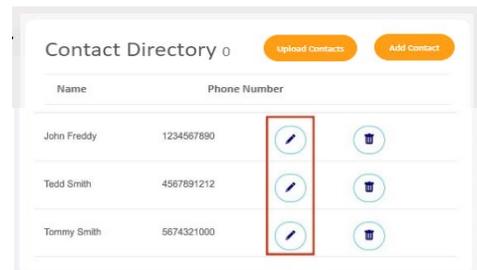
Add a Custom Contact

1. Click on the **Add Contact** button within the Contact Directory card.

2. Enter or select the following:
   - ❖ Name – Type the name of the contact.
   - ❖ Phone – Type the contact's phone number.
   - ❖ Enable Speed Dial – *Optional*. Select Yes | No (default)
   - ❖ Speed Dial – If Yes was selected, you must choose an option from the drop-down tool. Note: Use caution and do not select a speed dial number that correlates to an item listed below if the feature is enabled for use in your account.

3. Click Save when finished to submit the changes and update the system with the new information. The dialog closes and displays the new contact within the Contact Directory card. The directory on the hosted phone updates within minutes to include this new contact.

Add Contact

Name:

Phone:

Enable Speed Dial:
◉ Yes
○ No
Speed Dial:
Select

Note: Some Speed Dial codes conflict with certain Feature Access Codes. See below for a list of conflicting Speed Dial codes that completely over-ride their Feature Access Code functionality when active:

#31 Calling Line ID Delivery Blocking Persistent Deactivation
#40 Call Forwarding Busy To Voice Mail Deactivation
#41 Call Forwarding No Answer To Voice Mail Deactivation
#43 Call Waiting Persistent Deactivation
#58 Group Call Park
#70 Night Service Activation Manual Override
#71 Night Service Deactivation Manual Override
#72 Forced Forwarding Activation
#73 Forced Forwarding Deactivation
#76 Call Forwarding Selective Activation
#77 Call Forwarding Selective Deactivation
#80 Make Outgoing Call as Call Center
#81 Make Personal Outgoing Call
#83 Escalate Call to Supervisor

Save   Close

Edit a Custom Contact

1. Click on the Edit ✎ button adjacent to a listing to open the Edit dialog
2. Make changes to the information or Speed Dial selection, as needed.
3. Click Save when finished to update the item within the list and close the dialog.

Delete a Custom Contact

1. Click on the **Delete** 🗑 button adjacent to a listing in the Contact Directory card to remove the listing from the system. The contact will be deleted from the lists in the Portal and Directory on the phone.
2. Click Yes to confirm when prompted or click No to cancel.

Upload Contacts

Click on the **Upload Contacts** ⬤ Upload Contacts button to open a file browser and select an excel file that is comma-delimited with column 1 = Name and column 2 = 10digit Number (no special characters or spaces) to upload into the list. Edits can be made as usual to each contact once added in this way.
Tip: Contact the Service Provider to get a formatted file.

View the Enterprise Custom Contact Directory

Click on the **Contact Directory** menu option on the left under **My Tools** to open the read-only list of Enterprise-level custom contacts. Users may read the items in that list but cannot make changes.

Voicemail

The Voicemail card displays your current voicemail messages and the common feature management tools in the Dashboard. It offers quick access any additional messages, Voicemail-related tools, and the ability to update the Voicemail PIN information.
The red dot • next to a Voicemail indicates an un-played message.

Many Voicemail settings are also found within the Voicemail Edit *view in the* ***Settings*** *page.*
Ref: Working with Settings.
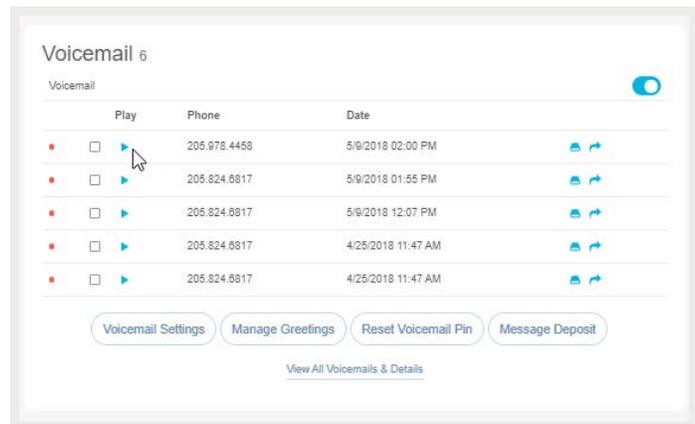
Enable/Disable Voicemail

🖥 The On/Off toggle at the top of the Voicemail card enables or disables the Voicemail feature right from the Dashboard.

Play Voicemail

▶ Click on the Play icon next to a voicemail in the list to listen to the message online.

Download Voicemail

⬇ Click on the Download icon next to a message to download and save a copy of the message file to a location on your PC or system.

Forward Voicemail

↪ Click on the Forward icon next to a message to send the voicemail .wav file to an email address.

Voicemail Block | Delete

☐ Click to place a checkmark ✓ in the box next to a Voicemail to view the Block | Delete options above. Simply click on the option you prefer to perform the action.

❖ Block disallows future calls from the number without providing a warning message to the caller.

❖ Delete immediately removes the Voicemail from your dashboard/phone list and deletes the record/recording fully from the database at midnight.

View All Voicemails and Details

Click on the View All Voicemails link below the list to open the dialog and review or manage any additional voicemails. Buttons to some of the other Voicemail card features on the dashboard display here, as well.

Reset Voicemail Pin

Reset Voicemail Pin   Click on the Reset Voicemail Pin button to reset the current PIN to the default (8462) to allow a new Voicemail PIN to be safely entered via the telephone/device.

Manage Voicemail Settings

Voicemail Settings   The Voicemail Settings button opens the Voicemail Settings pop-up dialog where the following voicemail settings may be turned on or off 👆 and email notifications and forwarding on '0' may be managed.

Always click the Save button once changes are made to submit new information. A Success! Message displays when an update to Voicemail Settings is completed.

Voice Messaging

On | Off – Turns the Voicemail feature on or off.

Send All Calls to Voicemail

On | Off – All calls are sent to voicemail while this feature is enabled.

Send Busy Calls to Voicemail

On | Off – When this setting is enabled, new incoming calls are sent directly to voicemail if the line is already in use (busy).

Send Unanswered Calls to Voicemail

On | Off – When this setting is enabled, calls that go unanswered after
a specified number of rings are sent to voicemail.

Forward to Multiple Emails

On|Off – (Unified Communications) - When Enabled, this feature saves voicemail messages in the portal and sends the voicemail recording files to the email(s) specified.
Click the toggle to turn On (enable), and then enter from 1 to 5 email addresses separated by commas in the text field that is provided.
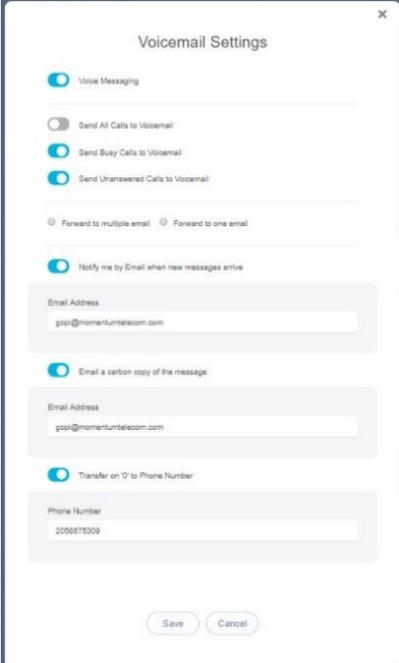
Forward to One Email

On|Off – Sends the voicemail recording file to a specified email address. Note: Enabling this option sends the message recordings to the email address and does not save the voicemails in the portal or voicemail inbox. Click the toggle to turn On (enable) and then enter the email address in the text field provided.

Notify Me by Email When New Messages Arrive

On|Off – When enabled, a simple voicemail notification email will be sent to the address that is defined in the text field provided as new voicemail messages are received.

Email a Carbon Copy of the Message

On|Off – When enabled, a copy of the notification email is sent to the email address defined in the text field provided.

Transfer on '0' to Phone Number

On|Off – When set to ON and a 10-digit phone number is defined, callers are given the option to press '0' to transfer to that number.

Message Deposit

Message Deposit The Message Deposit button opens the Message Deposit pop-up dialog where the user may set their voicemail to disable incoming callers' ability to leave a voicemail message after hearing the greeting.

1. Click to place a check mark ✓ in the box next to either of the following option(s) you prefer.

   General Disable Message Deposit - Callers will hear your greeting when sent to voicemail, but cannot leave a voicemail while this setting is checked and the system will disconnect the call once the greeting is played.

   No Answer Greeting Disable Message Deposit - Callers cannot leave a message when the No Answer Greeting is used.

2. Click on the **Save** button to submit the change and the system will begin to disallow callers from leaving messages in your voice mailbox per the option(s) you chose. Return to this dialog to remove the checks and allow callers to leave messages again.
   Please note: While Message Deposit is disabled, changes cannot be made to the greetings in use.

Note: The Message Deposit settings work in combination with the current setup of features and greetings for Voicemail. Ref: *Manage Greetings | Voicemail Set*tings | Announcement Repository

Manage Greetings

Manage Greetings The Manage Greetings button opens the Manage Greetings pop-up dialog where the following voicemail settings may be set:

1. Click on the **Manage Greetings** button within the Voicemail card.

2. Enter or select the following:

   ❖ Busy Greeting – Click to select either *System Greeting* (default) or *Personal Greeting*. If *Personal Greeting* is selected, use the drop-down menu directly below to choose a greeting that was previously uploaded for this purpose. Ref: Announcement Repository

   ❖ No Answer Greeting – Click to select either System Greeting or Unavailable Greeting. If Unavailable Greeting is set, the user may elect to choose a greeting uploaded to Greeting Name or Greeting Audio as well. Additional options are available to have up to 6 different greetings setup on standby.

   ❖ Number of rings before greeting: Use the drop-down menu to select a number from 1 to 10 to set the number of rings before being sent to Voicemail when the Greeting defined above plays to the caller.

   ❖ 🎙 Auto-login to Voice Portal when calling from my phone. Click to set to ON or OFF.

3. Click **Save** when finished to submit the changes and update the system with the new setup.

Call Logs

The Call Logs card displays a list of the latest incoming and outgoing calls on the account with filters to review specific call types and date ranges. It also provides easy access to review all available call log data for the past 90 days – up to 1000 calls via the View All Call Logs & Details link.

Filter Call Logs

Within the Call Logs dashboard card, multiple *Filters* are provided that allow users to select specific call types and date ranges to review. The Call Logs filter options include:

Call Type
All Calls
Incoming Calls
Outgoing Calls

Date
Today
Yesterday
Last 7 Days
Last 30 Days
Last 90 Days

Custom

Call Connection Type
All Calls
Connected
No Answer
Incomplete
Forwarded

View All Call Logs & Details

The View All Call Logs & Details link at the bottom of the Call Logs card offers easy access to review a detailed list of up to 1000 calls over the past 90 days. The same filters offered within the dashboard are available within the larger view to make it simple to locate information about specific call types or calls that occurred within specific time-frames, and a link to Export Call Logs to a spreadsheet format report is provided.

Basic Features

The Basic Features Dashboard card provides quick access to your On/Off feature settings and information about each. This dashboard section also provides a View All Features link that opens the Settings page for review and management of additional service features.

Basic Features	_ +
Anonymous Call Rejection *i*	⬤
Barge-In Exempt *i*	⬤
Caller ID *i*	⬤
Call Waiting *i*	⬤
Connected Line ID Restrictions *i*	⬤
Do Not Disturb *i*	⬤
Music On Hold *i*	⬤
Outbound Caller ID Block *i*	⬤

View All Features
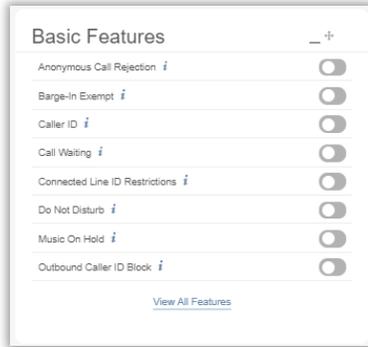
Each item displayed within the Basic Features card on the Dashboard is an On / Off setting for the individual user account. Descriptions of the features that are provided for management here display as pop-up information by placing the cursor over the *i* icon next to an item.

The slider toggles in the Basic Features card set each available option to On (enabled) or Off (disabled) quickly and easily.

Additional settings may be managed by clicking on the View All Features link at the bottom of this dashboard card. This opens the full list of feature settings.

Working with Settings

Clicking on the View All Features link at the bottom of the Basic Features card opens the Settings page, which lists the features and services that are available to the user in a simple table format and provides access to review and to *Edit* the settings for each feature.

All services are permission based.
The services you see are the ones assigned to your account.

❖ Features are generally grouped by type to make similar features easy to locate.

❖ On/Off features show their current status within the table.

❖ The arrow ► under the View/Edit column (far right) adjacent to a feature opens the *Edit* view.

❖ While viewing a feature's setting details, the 🛈 See instructions icon at the bottom of the view provides access to helpful information about setup and/or interactions with other features.
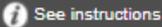
Settings		
Profile		VIEW/EDIT
Profile		►
General	ON/OFF	VIEW/EDIT
Anonymous Call Rejection	OFF	►
Announcement Repository		►
Call Block	OFF	►
Caller ID	ON	►
Call Notify	OFF	►
Call Waiting	OFF	►
Connected Line Identification Restriction	OFF	►
Do Not Disturb	ON	►
Hoteling Guest	ON	►
Hoteling Host	ON	►
Outbound Caller ID Block	ON	►
Priority Alert		►
Privacy		►
Selective Call Acceptance	ON	►
Speed Dial		►
Forwarding	ON/OFF	VIEW/EDIT
Call Forwarding Selective	OFF	►
Find Me – Simultaneous Ring	ON	►
Find Me – Sequential Ring	OFF	►
Push to Talk	ON	►
Messaging	ON/OFF	VIEW/EDIT
Voicemail	ON	►
Distribution List		►
Reset Voicemail Pin		►
Mobility		VIEW/EDIT
Anywhere		►
User Services	ON/OFF	VIEW/EDIT
Enterprise Directory		►
Time Schedule	ON	►

❖ Many of the On/Off features shown in this list and the individually enabled settings shown here may also be managed through the device using phone codes, AKA: Star Codes. (ex: *77).

⚠ *Your account type and/or role defines the features and services you may access.*
Some features shown in this document may not be available to all users.

Access the Settings Page

In the My Services Dashboard:

1. Click on the View All Features link in the Basic Features card to open the Settings page.

To View / Edit Feature Settings

1. In the Settings page: Click on the arrow ► under the View/Edit column next to a feature to open the *Edit* view.

Profile

The Profile section of the *Settings* page offers additional personal data fields that may be included for directories and phone lists.

Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Manage Profile

1. Enter any information that you wish to make available in lists or directories.

2. Click the Save button to update and return to the Settings page.

Anonymous Call Rejection

On | Off setting. Anonymous Call Rejection tells the system to play an intercept message and reject (block) incoming calls from anyone with Caller ID set to 'Anonymous'. Because the calls are blocked and will not ring through, Call Logging, etc. are disabled when a call triggers this feature. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Manage Anonymous Call Rejection

1. Slide the toggle to ON or Off.
2. Click the Save button.

Announcement Repository

The Announcement Repository service offers the ability to upload and store message .wav files for use as Voicemail greetings and announcement messages which callers will hear when assigned to various services.

The repository provides up to 1 GB of storage space. Storage space displays for review. Maximum file size for audio announcements is 5 MB in CCIT u-Law 8kHz, 8-bit Mono format.
Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Add an Announcement File

1. Click on the Add button to begin.
2. Type the Name to be displayed in selection lists.
3. Click on the Choose File button to select a local audio file to upload into the repository.
4. Click the Save button to submit the change and return to Settings.

Download an Announcement File

1. Click on the Download link.
2. Navigate to and select the local folder you wish to use to save a copy of the file.

Edit an Announcement File

1. Click on the Edit link next to an Announcement listing to open its *Edit* view and make changes.
2. Click on the Save button to submit changes and close this dialog.

Delete an Announcement File

Use Caution. The removal action is immediate and cannot be undone.

1. Click to place a check ☑ in the box next to an Announcement in the file list to select it.
2. Click on the Delete button.

Barge-In Exempt

On | Off Setting.
This service requires authorization to manage.
When enabled, it will try to block barge in attemps
from other users (generally Supervisors)
who may use Directed Call Pickup with Barge-In
enabled. Click the adjacent drop-down arrow ► to
access this feature's *Edit* view to turn On or Off.

Call Block

Use the Call Block feature to define criteria that will block calls from people you would rather not talk
to, limit or forward calls from specific numbers, or even create a list of numbers you always want to
accept even when Call Block is enabled.
Incoming calls that meet all criteria are
notified that you cannot be reached, and the
call is disconnected. These calls are not
logged.
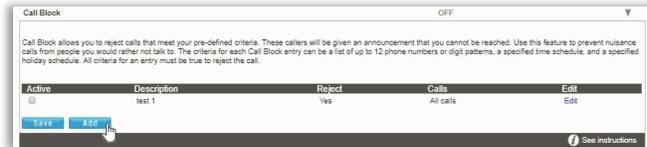
Add a Call Block

1. Click on the Add button to begin defining new Call Block criteria.
2. Define the following criteria, as needed:

   ❖ Description – Required: A short descriptive
     title for this call block type to show in the list.
   ❖ Reject Call – Optional: Click to setup this list
     to Block Calls when your criteria are met.
   ❖ Do Not Reject Call – Optional: Click to setup
     this list to accept specific calls when your
     criteria are met.
   ❖ Select Time Schedule– Optional: Choose a
     Time Schedule from the drop-down menu.
     OR
   ❖ Selected Holiday Schedule – Optional:
     Choose a Holiday Schedule from the drop-down menu.
     Note: *Only one schedule type (Time or Holiday) can be used in a Call Block list.*
   ❖ From Any Number – Optional: Select if any number dialed in will be accepted or blocked
     for the schedule you selected.
   ❖ Forwarded – Optional: Select if incoming forwarded numbers will be blocked.
   ❖ From Following Phone Numbers – Select to define individual numbers to accept or block.
   ❖ Any Private Number – Select to trigger on incoming calls with "Private" Call ID.
   ❖ Any Unavailable Number – Select to trigger on incoming calls with "Unavailable" Call ID.
   ❖ Specific Phone Numbers – Select and then enter up to twelve (12) 10-digit phone numbers.
3. Click the Save button when finished to submit the call block criteria and close the view.
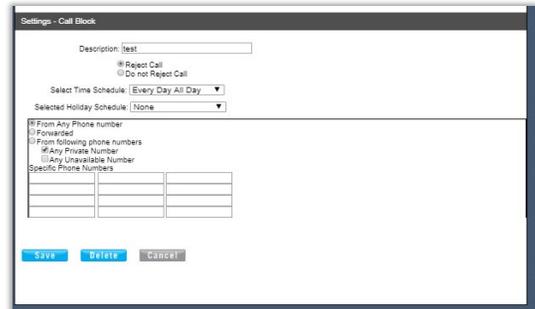
Edit a Call Block

1. Click on the Edit link next to a Call Block entry.
2. Make changes to the Description, Trigger Options, and/or the specified Phone Numbers.
3. Click the Save button when finished.

Activate a Call Block

1. Click to place a checkmark ☑ next to a Call Block entry to <u>activate</u> that selection.
2. Click the Save button to submit the change and close the *Edit* view.

Delete a Call Block

Use caution. The item is immediately removed when Delete is selected.

1. Click on the *Edit* link next to a Call Block entry.
2. Click the Delete button to remove the selected Call Block and its information from the system.

Caller ID

On | Off Feature. Caller ID allows the user to turn view Caller ID for incoming calls. When enabled, it may take up to two (2) rings to see the available Caller ID information on your device. Note: The Off option deactivates Caller ID for incoming calls, but not for your outgoing calls. See Outbound Caller ID Block. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.
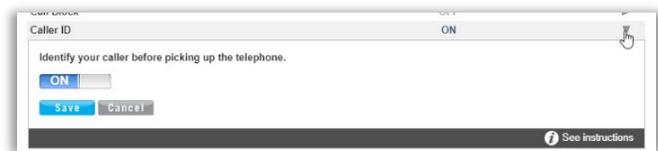
Manage Caller ID

1. Slide the toggle to ON to enable or Off to disable.
2. Click on the Save button to submit the change and close the *Edit* view.

Call Notify

The Call Notify service allows users to define the recipient address for email notifications when specific types of calls are received. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.
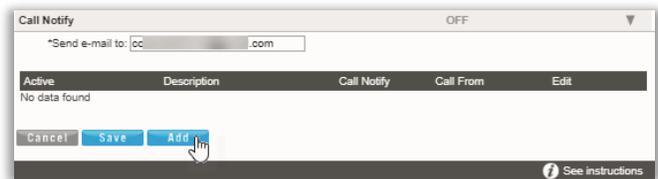
Setup Call Notify

1. Send email to: Enter the email address for call notifications.
2. Click the Add button to define new *Call Notify* criteria.
3. **Description**: Enter a name to display in lists.
4. Select or define the following options, as needed:
   ❖ Set to Notify or Do Not Notify.
   ❖ Select Time Schedule: Select from the drop-down menu of pre-defined Time Schedules. - **OR** -
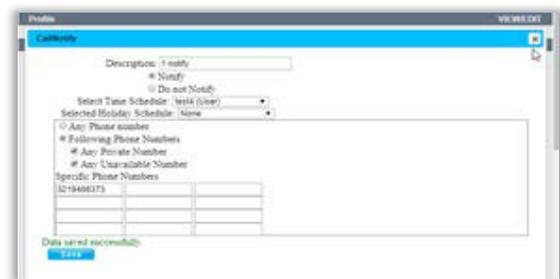
❖ Selected Holiday Schedule: Choose an option from the drop-down menu.
Note: *Only one schedule type (Time or Holiday) can be used as a trigger in a Call Notify list.*

❖ Call Policies: Select an option from the following - From Any Phone Number, Following Phone Numbers, Any Private Numbers, Any Unavailable Numbers, and/or specify up to twelve (12) Phone Numbers, as needed (if From Following... is selected).

5. Click the Save button and wait for the Data Saved Successfully! message to display.
6. Click on the Exit icon to close the criteria dialog.
7. Click the Save button to update the system and close the *Edit* view.

Activate Call Notify

1. Click to place a check in the box ☑ under the Active column for a listing to activate it.

Edit Call Notify Settings

1. Click the Edit link next to a *Call Notify* listing.
2. Make changes as needed.
3. Click the Save button and wait for the Data Saved Successfully! message to display.
4. Click on the Exit icon to close the dialog.
5. Click on the Save button to update the system and return to the Settings list view.

Delete Call Notify

1. Click the Edit link next to the desired listing.
2. Click the Delete button and wait for the Deleted Successfully! message to display.
3. Click on the Exit icon to close the dialog.
4. Click on the Save button to update the list and return to Settings.

Call Transfer (Recall)

The Call Transfer service enables a user to transfer calls to specified destinations as Blind, Consultative, or 3-way Consultative Transfers. This setting defines the criteria to automatically recall your transferred calls when they are not answered for any reason, and/or to prevent your transferred calls from being automatically redirected by the destination user.

Click the adjacent drop-down arrow ► to access the *Edit* view.

Manage Call Transfer Recalls

1. Click within the radial button to turn the service ⊙ On or ○ Off.
2. Configure the following setting options, as needed:

❖ Number of rings before Recall: Select a number of rings from the drop-down menu.

❖ Enable Busy Camp On for x Seconds: Turn on 'busy' for a set time.

Click to place a check in the ☑ box to enable (or ☐ disable) and enter a number of seconds.
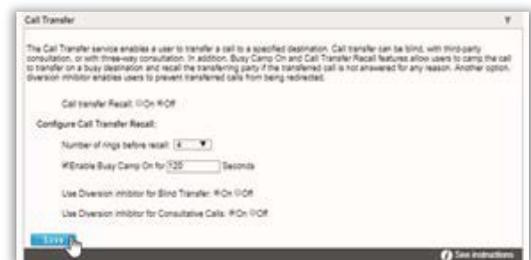
❖ Use Diversion Inhibitor for Blind Transfer: Disallow auto-redirects on Blind Transfers. Click within a radial button to set to ⊙ On or ○ Off.

❖ Use Diversion Inhibitor for Consultative Transfer: Disallow auto-redirects on Consultative Transfers. Click within a radial button to set to ⊙ On or ○ Off.

3. Click on the Save button to submit the setup/change(s) and close the *Edit* view.

Call Waiting

On | Off Setting. The Call Waiting service allows users to receive calls while their line is in use, see the caller ID of the new caller, and decide whether to automatically place the current caller on hold and answer the second call, or let the second call go to Voicemail (if enabled). Click the adjacent drop- down arrow ► to access this feature's *Edit* view.
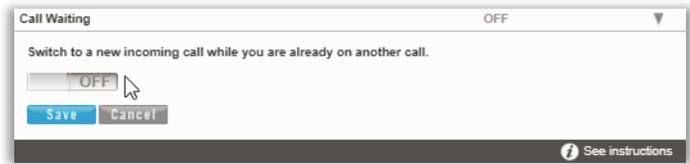
Manage Call Waiting

1. Slide the toggle to ON or Off and click on the Save button to submit the change and close the *Edit* view.

Connected Line Identification Restriction

On | Off Setting. The Connected Line Identification Restriction feature allows you to block your number from being shown when receiving a call. Members of your group can still see your number when they call you.

Click the adjacent drop-down arrow ► to access this feature's *Edit* view.
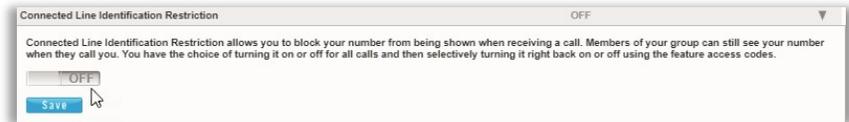
Manage Connected Line ID Restriction

1. Slide the toggle to ON or Off and click on the Save button to submit the change and close the *Edit* view.

Conference List

The Conference List service allows users to manage settings for online conferences, the participants and moderators, and the conference recording downloads. Click the adjacent drop-down arrow ► to access this feature's setting management tools.
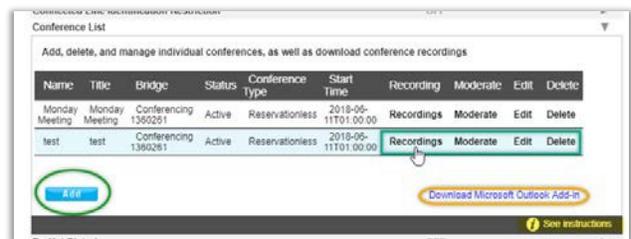
Add a Conference Listing

1. Click on the Add button to create a new conference.
2. Select the appropriate Conference Bridge type from the drop-down menu.
3. Define the following:
   ❖ Title (a short description of the conference)
   ❖ Estimated Number of Participants _____
   ❖ Maximum Number of Participants _____

- ❖ Account Code____(an x-digit code for participants to use to access the conference)
4. Click to place a check within the adjacent box ☑ to enable the following options, as needed:
    - ❖ Mute Participants on Entry
    - ❖ End Conference When Moderator Leaves
    - ❖ Moderator Required to Start
5. Define When Participant Joins: Select the appropriate action from the drop-down menu.
6. Define Type: Select from *One Time* (Define the Date, Start Time and Duration in HH and MM), *Reservationless* (Define the Start Date and End Type), and *Recurring* (Define the Recurrence information as required)
7. Click the Save button to add the new Conference setup and close the criteria *view*.
8. Click the Save button in Conference List settings to update the system and exit the *Edit* view.
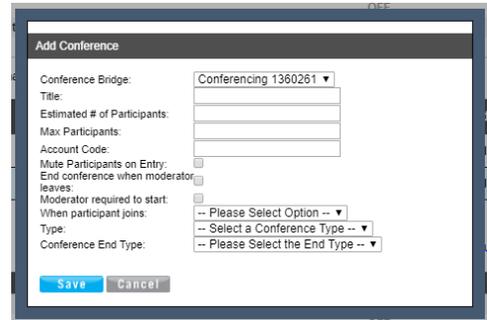
Manage Conference Recordings

The following recording management tools are provided in the *Edit* view:

A. Click on the Recordings link next to the appropriate Conference Listing to review any recording details and options.
B. Click on the Download option and follow the steps to save a recording to a local file.
C. Click on the Delete option next to a listing to remove the selected recording from the archive.
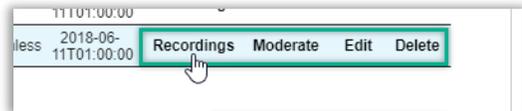
Edit a Conference Listing

1. Click on the *Edit* option next to the appropriate Conference listing to open the criteria setup view.
2. Make changes to the setup, as needed.
3. Click on the Save button to update the conference list information.

Delete a Conference Listing

Use Caution. The item and all its information are immediately removed from the system.
1. Click on the Delete option next to the appropriate Conference Listing to *Immediately* remove it.

Launch Moderator Tool

1. Click on the Moderate link next to the appropriate Conference Listing.
2. Enter your Password.
3. Click the Launch Moderator Tool button to open the pop-up view for the conference.

Download the Conference Microsoft Outlook Add-In

1. Click on the Download the Microsoft Outlook Add-In Link at the bottom of the *Conference List settings* view and follow the instructions to install the plug-in.

Manage Conference Moderators

1. Click Edit next to the appropriate Conference listing.
2. Highlight the appropriate Available Users and use the arrows ◄ ► to move them to/from the Conference Moderators section.
3. Click the Save button to return to the Settings list when finished.

Custom Ringback User

As a Custom Ringback User, you can select a ringback message to be played to specified callers based on your pre-defined criteria.

The criteria for each Custom Ringback you define can include up to 12 phone numbers or digit patterns and specific schedules.

Click the adjacent drop-down arrow ► to access this feature's *Edit* view.
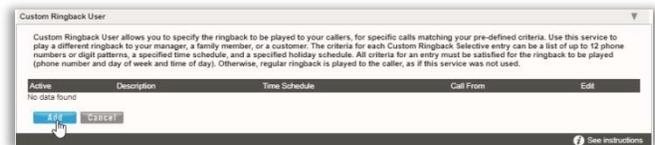
Add a Custom Ringback List

1. Click on the Add button to begin defining a Custom Ringback listing.
2. Description: Type a name that will display in the Custom Ringback list.
3. Enter or select from the following options, as needed:
   ❖ Play Custom Ringback: Click within the ⊙ radial button to enable and define the times and messages to play below.
   ❖ Do not play custom ringback: Click within the ⊙ radial button to enable and tell the system not to play a custom ringback and define the time(s)
   ❖ Select Time Schedule: Optional. Choose a Time schedule - OR -
   ❖ Selected Holiday Schedule: Optional. Choose a Holiday Schedule in the drop-down menu.
     Note: *Only one schedule type (Time or Holiday) can be used as a trigger in a Custom Ringback list.*
   ❖ Audio Ringback: Click to enable ⊙ *No personal Ringback*, ⊙ *URL* or *Personal Ringback File* and enter or use the drop-down menus to include the information required for your selection.
   ❖ Calls From: Click to select ⊙ *Any Phone Number* or ⊙ *Following Phone Numbers*
   ❖ As Needed: Click within the adjacent check boxes ☑ to include calls from Any private number, and/or Any unavailable number.
   ❖ Specific Phone Numbers: Enter the 10-digit numbers in the fields provided, as needed to define calls from specific numbers.
4. Click on the Save button to submit the new Custom Ringback listing and close the *Edit* view.

Edit a Custom Ringback List

1. Click on the Edit link adjacent to the desired Custom Ringback listing.
2. Make changes to the setting options, as necessary.
3. Click on the Save button to submit the changes and return to Settings.

Delete a Custom Ringback List

Use Caution. Once Delete is selected, the item and all its information are immediately removed from the system.

1. Click on the Edit link adjacent to the Custom Ringback listing you wish to remove.
2. Click on the Delete button to immediately remove the custom callback list from the system and exit the *Edit* view.

Direct Call Pickup with Barge-In

Dial into a call to another member of the group and if already answered, create a 3 way conference. Click the adjacent drop drop-down ▶ arrow to access this feature's Edit view and enable the following options:

1. Barge-In Warning Tone: Click On to enable the tone
2. Automatic Target Selection: Click On to enable.
3. Click the Save button to submit the change and close the view.
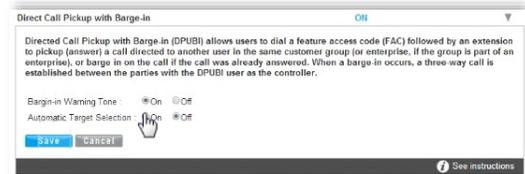
Do Not Disturb

On | Off Setting. When Do Not Disturb is enabled (ON), incoming callers receive a message stating that you are busy and can be sent to your Voicemail if that service is also turned ON. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.
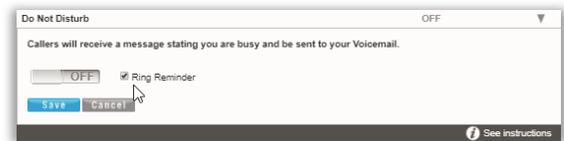
Manage Do Not Disturb

1. Click to toggle the switch to On or Off, as desired.
2. Ring Reminder: Click to place a check in the box ☐ if you wish to be reminded that DND is enabled.
3. Click the Save button to submit the change and exit the *Edit* view.

Hoteling Guest

The Hoteling Guest feature allows a user to associate their account profile with a Hoteling Host user's device/number, which means the Hoteling Guest user can utilize the Hoteling Host's device as though it is their own device/extension for a period of time.

Click the adjacent drop-down arrow ► to access the *Edit* view.

Manage Hoteling Guest

1. Click within a radial button to set Hoteling Guest to On or Off.
2. Limit Association to x Hours: Click to place a check mark to enable and then enter the number of Hours.
3. Highlight an Available Host number and use the arrow ► to move it to the Associated Host section to select it.
4. Click the Save button to submit the change and exit the *Edit* view.
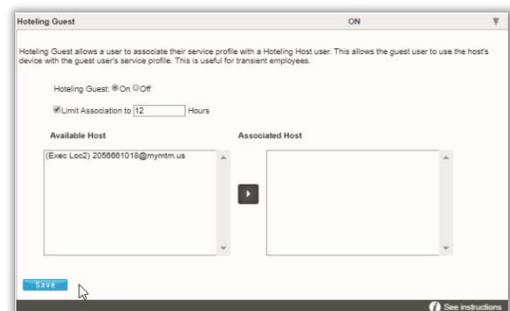
Hoteling Host

The Hoteling Host service allows a user account/device to be designated as a *Host*. A user who is already setup as a Hoteling Guest can then select the Hoteling Host. When the two are associated, the Host allows the Guest to use the host's device with the guest's service profile (as though it is their own device/extension) for a period of time. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Manage Hoteling Host

1. Hoteling Host: Click within a radial button to set to On ⊙ or Off ○ (default).
2. Enforce Association Limit 24 Hours: Click to place a checkmark in the box ☑ to enable the limitation. If the Association limit (24hrs) is not enforced, the Guest user is allowed to associate with the Host user's device indefinitely.
3. Access Level: Click to select ⊙ *Enterprise* or ⊙ *Group*.
4. Associated Guest: Enter the requested information (Last Name, First Name, Phone Number, Extension, and the Associated Date).
5. Click Save to submit and close the *Edit* view.

Music On Hold

On | Off feature. The Music On Hold feature may also be available to manage from the Basic Features card on your Dashboard/Home Page. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Manage Music On Hold

1. Click within the appropriate radial button to turn On ⊙ or Off ○ (default).
2. Click the Save button to submit the change and close the view.

Outbound Caller ID Block

On | Off feature. When enabled, the Outbound Caller ID feature allows you to block your Caller ID information from being displayed when you call someone. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Manage Outbound Caller ID Block

1. Slide the button to turn On or Off (default).
2. Click the Save button to submit the change and close the *Edit* view.

Pre-Alerting Announcement

The Pre-Alerting Announcement service allows authorized users to specify an audio or video announcement to be played to calls matching pre- defined criteria before the call is actually connected.

Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Add a Pre-Alerting Announcement

1. Click within the appropriate Pre-Alerting Announcement radial button ⊙ to turn the feature On (enable) or Off.
2. Click to select from the following basic options in the Audio Announcement or Video Announcement section:
   - ❖ Default Announcement: Click to select this option.
   - ❖ URL: Click to select this option and enter the URL web address in the adjacent text field.
   - ❖ Personal Ringback File: Click to select this option and select the correct file from the drop-down menu.
3. Click on the Add button to open the *Add Item* view.
4. Description: Enter a name in the field provided.
5. Select the following *usage options*, as needed:
   - ❖ ⊙ Play Custom Ringback, or
   - ❖ ⊙ Do not play custom ringback
   - ❖ Selected Time Schedule: Optional. Choose a Time schedule from the drop-down menu. OR
   - ❖ Selected Holiday Schedule: Optional. Pick a Holiday schedule in the drop-down menu. Note: *Only one (1) of the schedule types (Time or Holiday) can be used at a time as a trigger.*
6. Calls From: Select the following options, as needed:
   - ❖ ⊙ Any phone number, or
   - ❖ ⊙ Following Phone Numbers (and specify up to twelve (12) 10-digit numbers in the fields below).
   - ❖ ☑ Any Private Number
   - ❖ ☑ Any unavailable number
7. Click on the Save button in the *Add Item* dialog to submit the criteria and return focus to the settings dialog.
8. Click on the Save button in to update the system and return to Settings.

Edit a Pre-Alerting Announcement

1. Modify and save the following features, as needed:
   - ❖ Click to turn the feature ⊙ On or ⊙ Off.
   - ❖ Select an alternate Audio or Video Announcement file and specify the source.
   - ❖ Click on the Edit link adjacent to a listing and make changes to the options, schedules, or numbers.
2. Click the Save button(s) when finished in each of the views to submit the changes and updates.

Delete a Pre-Alerting Announcement

1. Click on the Edit link adjacent to a Pre-Alerting Announcement listing to view the *Edit Item* dialog.
2. Click the Delete button to remove the listing close the dialog.
3. Click on the Save button to update the system with the change.

Priority Alert

The Priority Alert feature allows a user to define criteria that triggers distinctive alerts for specific incoming calls.
Click the adjacent drop-down arrow ► to access this feature's *Edit* view.
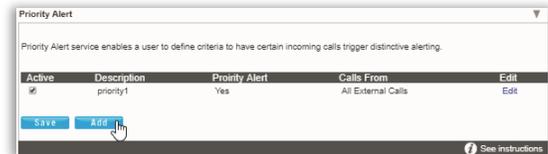
Add a Priority Alert

1. Click on the *Add* button to open the criteria dialog.
2. Description: Type a short title for this alert. (E.g., Priority 1, Low Priority, etc.)
3. Select, set, or define the following options, as needed:
   - ❖ Use Priority Alert – Click the radial button ⊙ to enable/disable.
   - ❖ Do Not Use Priority Alert – click the radial button ⊙ to enable/disable.
   - ❖ Choose a Selected Time Schedule <u>OR</u> Selected Holiday Schedule from the available drop-down menu options.
     Note: *Only one schedule type (Time or Holiday) can be used as a trigger in each Priority Alert setup.*
   - ❖ Any External Phone Number – click to enable ⊙/disable○.
   - ❖ Following Phone Numbers – click to enable ⊙/disable○.
   - ❖ Any Private Number – enable ⊙/disable○.
   - ❖ Any Unavailable Number – click to enable ⊙/disable○.
   - ❖ Specific Phone Numbers – enter up to 12 (twelve) 10-digit numbers that will be included for the alert.
4. Click on the Save button to submit the new *Priority Alert* and return to Settings.
   Optional: Repeat these steps to add alternate Priority Alerts with different triggers or schedules.

Activate a Priority Alert

1. Click to place a checkmark ☑ in the Active box next to a Priority Alert listing to activate it.

Edit a Priority Alert

1. Click on the Edit link next to the appropriate Priority Alert listing to open the Criteria dialog for editing.
2. Make changes to the settings, schedules, or numbers, as needed.
3. Click on the Save button to update the Priority Alert information.

Delete a Priority Alert

1. Click on the Edit link next to the appropriate Priority Alert listing to open its *Edit* view.
2. Click on the Delete button to remove the Priority Alert from the system.
   Wait for the Deleted Successfully! *message.*
3. Close the dialog to return focus the *Priority Alert* list.
4. Click on the Save button to update and exit.

Privacy

The Privacy feature allows you to setup your internal phone status privacy settings and define users who may see your status. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Manage Privacy

1. Click to enable ☑ or disable ☐ the following options, as needed:
   ❖ Enable Directory Privacy
   ❖ Enable Auto Attendant Extension Dialing Privacy
   ❖ Enable Auto Attendant Name Dialing Privacy
   ❖ Enable Phone Status Privacy

2. Use the ◄ ► arrows to move highlighted users to/from the Available Users (cannot see your status) and Assigned Monitors (can see your status) sections, as needed.
3. Click the Save button to update the system with the new information and close the *Edit* view.
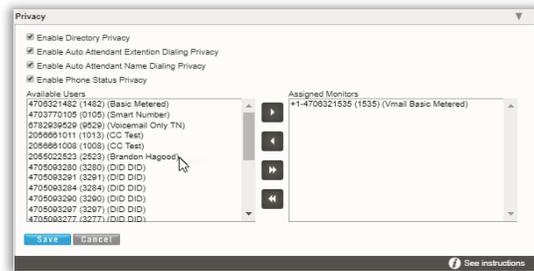
Selective Call Acceptance

Selective Call Acceptance allows the user to create lists of specific incoming calling numbers and the criteria for acceptance (or Non-acceptance).
Click the adjacent drop- down arrow ► to access this feature's *Edit* view.
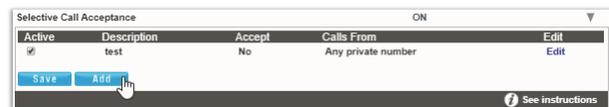
Add a Selective Call Acceptance List

1. Click on the Add button to open the criteria view.
2. Define the following criteria options, as needed:
   ❖ Description – Required: A short descriptive title for this Selective Call Acceptance list.
   ❖ Accept Call – Click to setup this list to Block Calls when your criteria are met.
   ❖ Do Not Accept Call – Click to setup this list to accept specific calls when the criteria are met.
   ❖ Select Time Schedule – Choose a Time Schedule from the drop-down menu.
     OR
   ❖ Selected Holiday Schedule – Choose a Holiday Schedule from the drop-down menu.
     Note: *Only one schedule type (Time or Holiday) can be defined as a trigger in each Selective Call Acceptance list.*
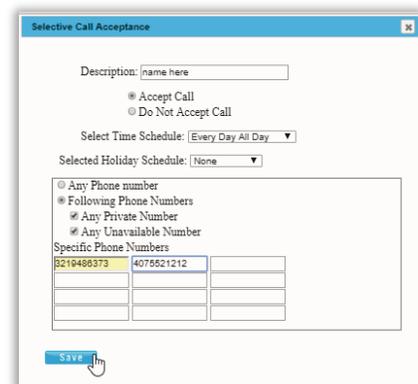
❖ Any Number – Select if any number dialed in will be accepted or blocked.

❖ Following Phone Numbers – Select to define individual numbers to accept or block.

❖ Any Private Number – Select to trigger for incoming calls with "Private" Caller ID.

❖ Any Unavailable Number – Select to trigger for incoming calls with "Unavailable" Caller ID.

❖ Specific Phone Numbers – Select and enter up to twelve (12) 10-digit phone numbers.

3. Click the Save button when finished to submit the changes and close the *Edit* view.

Edit a Selective Call Acceptance List

1. Click on the Edit link next to the appropriate Selective Call Acceptance listing to open the item's *Edit* view.
2. Make changes to the settings, schedules, or numbers - as needed.
3. Click on the Save button to update the Priority Alert information.

Delete a Selective Call Acceptance List

1. Click on the Edit link next to the appropriate listing.
2. Click on the Delete button and wait for the Deleted Successfully message.
3. Click on the ⊠ Exit icon to return to the list.
4. Click on the Save button to update the information and return to Settings.

Speed Dial

This time-saving feature allows users to define Speed Dial options for specific numbers using short 2 digit codes (00-99) prefixed by the # sign. Certain Speed Dial 2-digit code combinations will conflict with some Calling Feature Access/ Star Codes. The affected Star Codes are listed to assist the user. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Add a Speed Dial Contact

1. Click on Add Contact.
2. Enter First Name and Last Name.
3. Enter at least one (1) Phone Number (10 digits, no spaces or special characters) in the appropriate field (Home, Work, Mobile)
4. Primary Phone: Select the type using the drop-down menu (Home, Work, or Mobile)
5. Select from the available (unused) list of Speed Dial Codes using the drop-down menu (00-99). (Remember to check the star codes / feature access codes listed below for conflicts)
6. Click the Save button to submit the new Speed Dial Code and close the *Edit* view.
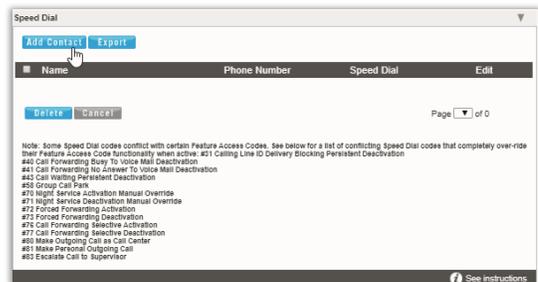
Edit a Speed Dial Contact

1. Click Edit next to a Speed Dial Contact in the list.
2. Make changes to name, numbers, primary assignment, or code, as needed.
3. Click the Save button to submit the change and close the view.

Delete a Speed Dial Contact

1. Click within the checkbox ☑ in the first column to select an item in the list.
2. Click on the Delete button below.
   OR
1. Click the Edit link next to a Speed Dial Contact to open its Criteria dialog.
2. Click the Delete button.
3. Click the ⊠ Exit icon to return to the *Edit* view.
4. Click Save to submit the changes and return to Settings.

Export Speed Dial Contact List

1. Click on the Export button to automatically download a .csv format report containing the current list of Speed Dial Contacts which can be saved to a local folder or printed, as desired.

Call Forwarding

The Call Forwarding service allows users to set up simple forwarding numbers for specific purposes and set the service to work Always, when you Don't Answer, have a Busy Line, or when you're Not Reachable. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Set Call Forwarding Number(s)

1. Click the toggle next to the appropriate forwarding option(s) to turn ON or Off.
2. Enter the 10-digit number or extension (no spaces or special characters) in the adjacent Forward To: field for the option(s) selected.
3. Forward After x Rings: Use the drop-down menu to select the number of rings before a call is forwarded.
4. Click the Save button to submit the changes and close the *Edit* view.

Edit Call Forwarding Numbers

1. Make changes as needed to forwarding numbers or enabled options.
2. Click the Save button to submit the change(s).

Delete Call Forwarding Numbers

1. Simply remove (erase) the number from the appropriate Call Forwarding type.
2. Click the Save button.

Call Forwarding Selective

The **Call Forwarding Selective** feature allows users to set up a default forwarding number, define specific criteria to trigger call forwarding, and receive a reminder when the feature is enabled. Click the adjacent drop-down arrow ▶ to access this feature's *Edit* view.

Add a Call Forwarding Selective List

1. Click within the radial button ⊙ to turn ON /enable or Off to disable (default).
2. Enter the Default Call Forward To number (10-digits, no spaces or special characters).
3. Click within the check box ☑ to enable Play Ring reminder when a call is forwarded.
4. Click the Save button to update the system and close the dialog.
5. Reopen the Call Forwarding Selective *Edit* view to see the updated listing.

6. Click the Add button to define the selective forwarding trigger criteria.
7. Enter or select from the following:
   ❖ Description: Type a short description or title for review in lists.
   ❖ Forward To: Select an option from those you defined (see steps 1-4 above) using the drop-down menu.
   ❖ Selected Time Schedule: Select a pre-defined Time Schedule using the drop-down menu - OR -
   ❖ Selected Holiday Schedule: Choose a pre-defined Holiday Schedule in the drop-down menu.
   Note: *Only one schedule type (Time or Holiday) can be defined as a trigger in each Call Forwarding Selective list.*
   ❖ Calls From: Select an option using the drop-down menu (enter up to twelve (12) 10-digit number(s) below if *From Following* is selected)
   ❖ Click within the radial buttons ⊙ to include forwarding to the default number for Anonymous caller ID and/or Unavailable caller ID.
   ❖ From Following: Enter up to twelve (12) 10-digit numbers in the fields provided.
8. Click the Save button to submit the data and close the view.
   Optional: Repeat these steps to create multiple lists with alternative triggers or schedules.

Edit a Call Forwarding Selective List

Editing options found within the Call Forwarding Selective *Edit* view include:

A. Turn On/Off: Click within the radial button for ON to enable or Off to disable (default) and Save.
B. Change Default Call Forward Number: Type a new 10-digit phone number in the field provided and Save.
C. Ring Reminder: Click within the Play ring reminder… checkbox to enable ☑ /disable ☐ and Save.
D. Or, edit the Forwarding Trigger Criteria:
   1. Click on the Edit link next to the desired listing to open the *Call Forwarding Selective Criteria* dialog.
   2. Make changes to the trigger criteria (Description, Schedules, and/or specified numbers to forward), as needed.
   3. Click the Save button to submit the changes and close the view.

Delete a Call Forwarding Selective List

Caution: This action is immediate and cannot be undone.

1. Click on the Delete link next to the desired listing to instantly remove the selected listing.

Find Me – Simultaneous Ring

The Find Me – Simultaneous Ring service makes it easy to ensure you don't miss a call. It allows users to define up to ten (10) alternate phone numbers/ SIP URI addresses to ring when a call comes through and create multiple scenarios to use when the service is *On*. All numbers ring at the same time, if they are enabled for usage. Click the adjacent drop-down arrow ▶ under View/Edit to access this feature's *Edit* view.

Setup Find Me – Simultaneous Ring Numbers

1. Click within the appropriate radial button to turn ON ⊙ or Off (default).
2. Do not ring my simultaneous ring numbers if I'm already on a call: Click to place a check in the box ☑ to enable.
3. Phone Number / SIP URI: Enter up to ten (10) phone or SIP URI numbers in the fields provided.
4. Answer Confirmation Required: Click to place checkmarks in the box to enable this feature for a number.
5. Click the Save button when finished to save the data and close the view.

Setup Find Me – Simultaneous Ring Triggers

1. Click on the Add button beneath the number list to open the *Add Simultaneous Ring Criteria* list.
2. Description: (required) Type a short descriptive title for review in lists.
3. Define the following criteria options, as needed:
   ❖ Setup Options: Use the drop-down menu to define whether this criteria list will use Simultaneous Ring or not.
   ❖ Selected Time Schedule: Use the drop-down menu to choose from predefined times you want the Simultaneous Ring feature to function, - OR -
   ❖ Selected Holiday Schedule: Use the drop-down menu to choose a predefined holiday schedule.
   Note: *Only one schedule type (Time or Holiday) can be used as a trigger in each Find-Me Simultaneous Ring list.*
   ❖ Calls From: Use the drop-down menu to choose an option (and enter phone numbers in the fields provided below if *Following Phone Numbers* is selected).
   ❖ Anonymous Callers: Click to add a check in the box ☑ to enable.
   ❖ Unavailable Callers: Click to add a check in the box ☑ to enable.
4. Click on the Save button when finished to submit the criteria and close the view.
   Optional: Repeat these steps to create additional lists with trigger criteria for different calling scenarios or schedules.

Edit Find Me – Simultaneous Ring

1. Make any changes to the Find Me settings.
2. Click the Edit link next to an item to make changes to the triggers.
3. Click the Save button(s) to submit the changes.

Delete Find Me – Simultaneous Ring

Caution: This action is immediate and cannot be undone.

1. Click the Delete link next to an item in the *Simultaneous Ring Criteria List* section to remove the selection.
2. Click the Save button to update the list information and return to Settings when finished.

Find Me – Sequential Ring

The Find Me – Sequential Ring service allows the user to define and manage up to five (5) alternate phone numbers that can be set to ring one after the other if an incoming call is not answered. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.
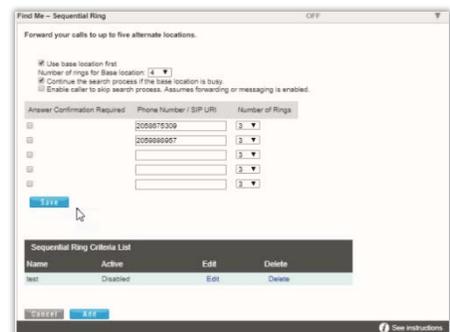
Setup Find Me – Sequential Ring

1. Define the following basic setup options, as needed:
   ❖ Use base location first: Click to turn On ☑ or Off ☐ (default).
   ❖ Number of rings for Base location: Use the drop-down menu to select a number of rings.
   ❖ Continue the search process if the base location is busy: Click within the check box to turn On ☑ or Off ☒ (default) to allow forwarding even when the base number is busy.
   ❖ Enable caller to skip process: Click within the check box to turn On ☑ or Off ☐ (default).
2. Define the setup for the numbers that will be used for forwarding (in the order of their use):
   ❖ Answer Confirmation Required: Click to place a check in the box to enable.
   ❖ Phone Number / SIP URI: Type a 10-digit number (no spaces or special characters) in the field(s) provided.
   ❖ Number of Rings: Use the drop-down selection tool to choose a number of rings before trying the next number in the list (below).
3. Click the Save button to submit the changes and return to Settings.

Setup Find Me – Sequential Ring Triggers

1. Click on the Add button beneath the number list to open the *Add Sequential Ring Criteria* dialog.
2. Add a Description: (required) Type a short descriptive title for review in lists.
3. Enter or select from the following trigger options, as needed:
   ❖ Setup Options: Use the drop-down menu to define whether this list will use Sequential Ring.
   ❖ Selected Time Schedule: Use the drop-down menu to select a predefined time schedule - OR -
   ❖ Selected Holiday Schedule: Use the drop-down
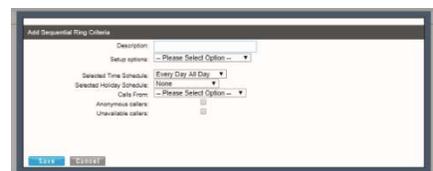
menu to choose a predefined holiday schedule.
Note: *Only one schedule type (Time or Holiday) can be used as a trigger in each list.*

❖ Calls From: Use the drop-down menu to choose an option (and enter phone numbers in the fields provided below if *Following Phone Numbers* is selected).
❖ Anonymous Callers: Click to add a check in the box ☑ to enable.
❖ Unavailable Callers: Click to add a check in the box ☑ to enable.

4. Click on the Save button when finished to submit the trigger criteria and return to Settings. Optional: Repeat steps to create additional lists with alternate triggers or phone numbers.

Edit Find Me – Sequential Ring

1. Make changes to numbers or Answer Confirmation settings, as needed.
2. Click the Edit link next to a list item and make changes to the trigger criteria, as needed.
3. Click the Save button to update the information when finished.

Delete Find Me – Sequential Ring

Caution: This action is immediate and cannot be undone.
1. Click the Delete link next to a list item.
2. Click the Save button to update the list and return to Settings.

Push to Talk

The Push to Talk feature allows specific calls to be answered automatically via the speakerphone/intercom function on the device. Users can define which numbers/callers within the directory will have *Push to Talk* access when calling you.

Click the adjacent drop-down arrow ▶ to access the *Edit* view.

Manage Push To Talk

1. Define the following options, as needed:
   ❖ Auto Answer: Click to place a check in the box to automatically answer *Push to Talk* calls via speakerphone/intercom.
   ❖ Outgoing Connection Type: Click within the radial buttons to select the appropriate connection type.
   ❖ One Way: The originator can talk to the party receiving the call, but the receiver cannot respond.
   ❖ Two Way: The originator and receiver can talk to each other.
   ❖ Access Lists: Click within the radial button to select the appropriate option:
   ❖ Allow Calls from Selected Users: Select users to allow below.
   ❖ Allow Calls From Everyone Except Selected Users: Select users to disallow below.
   ❖ Available Users: Highlight and use the arrows ▶ ◀ to move users to move selection(s) to and from the *Selected Users* section.
2. Click on the Save button to submit the changes and return to Settings when finished.

Contact Centers

The settings for Contact Centers are generally pre-defined by an Admin during the installation and implementation of a Contact Center, or upon the addition of new users. However, some Supervisors or Managers may receive additional access to modify limited settings used in conjunction with the Contact Center features within their individual accounts. Remember, these settings do not override the Enterprise Contact Center Agent or Supervisor settings.

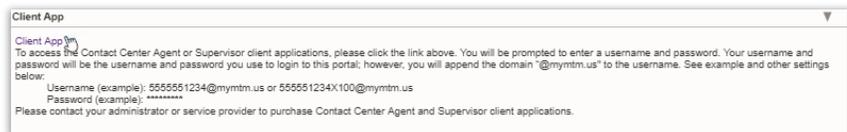The adjacent drop-down arrow ► opens this feature's *Edit* view.

Manage Contact Center Settings

1. Define the following options:
   - ❖ ACD State: Select an option from the drop-down menu.
   - ❖ Make outgoing calls as: Click to enable and select the appropriate menu option.
   - ❖ Use Guard Timer Setting: Click to select for either Default or User.
   - ❖ Enable guard timer: Click ☑ to enable and select the appropriate number of *Seconds* using the drop-down menu.
   - ❖ Use Agent Unavailable Settings: Click to select either Default or User settings.
   - ❖ Click ☑ to enable/ ☐ disable Force agent to unavailable on Do Not Disturb activation.
   - ❖ Click ☑ to enable/ ☐ disable Force agent to unavailable after X consecutive bounced calls and specify the number.
   - ❖ Click ☑ under Join Contact Center to enable your account for contact center usage.
   - ❖ Select an alternate Skill Level using the available drop-down menu options.
2. Click the Save button when finished to submit the changes and close the view.
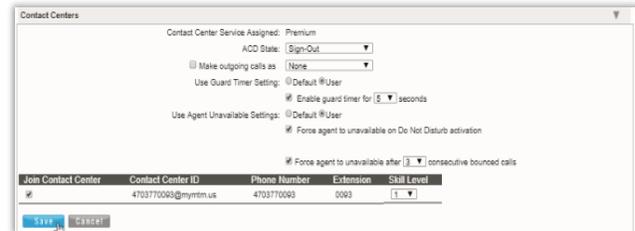
Client App

The Client App feature in the *Settings* page provides authorized users with an additional access point to open the Contact Center or Supervisor client application sign in page. Instructions are provided in the *Edit* view.

Supervisor

The Supervisor feature in the *Settings* page offers authorized users the ability to manage their Contact Center agent assignments. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Manage Supervisor Settings

1. Click on the Edit link to view the Agent assignment options.
2. Highlight the agents you wish to select and use the ◄ ► arrows to move Available Agents to Assigned Agents or vice versa.
3. Click the Save button when the changes are complete to update the system and close the *Edit* view.

Fax-to-Email / Email-to-Fax

1. Click on the Edit link to view the setting options.
2. **Enter email address below**: Enter the email address to use for Fax.
3. Click the Save button when the changes are complete to update the system and close the *Edit* view.
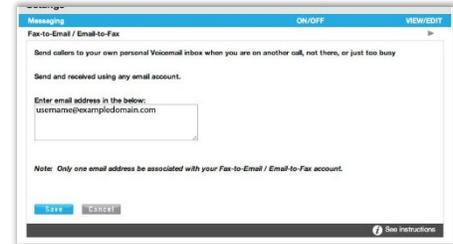
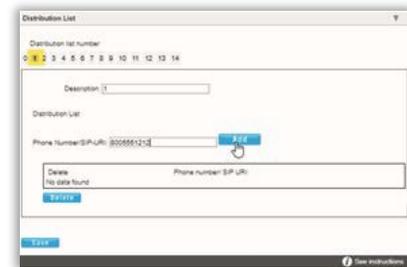## Voicemail

See <u>Voicemail</u>.

Distribution List

The Distribution List feature allows the user to create one or more messaging distribution lists (up to 14) that will send Voicemail notifications using the portal when new messages are left on voicemail. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Manage Distribution List

1. Click to select a Distribution List Number from the options at the top.
2. Enter the Description (name).
3. Type the Phone Number/Ext (10-digits, no spaces or special characters).
4. Click the Add button and click Save to submit the data and exit.

Reset Voicemail Pin

See <u>Reset Voicemail Pin</u>.
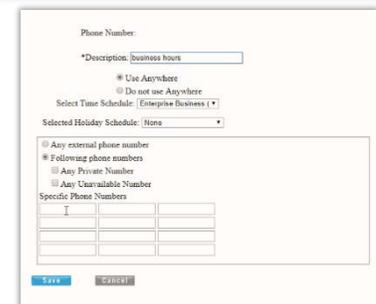
Anywhere

The Anywhere feature allows users to set up another way to ensure no calls are missed by defining an Alternate Phone Number for use with the Mobility application. Click the adjacent drop- down arrow ► to access this feature's *Edit* view.

Setup Anywhere

1. Click the View Available Portal List link to review the available Anywhere numbers and make note.
2. Click the Add button.
3. Enter the 10-digit Anywhere phone number.
4. Enter a short Description (name) for display in lists.
5. Click within the checkboxes to Enable ☑ / Disable ☐ the options.

6. Click on the Selective Criteria tab to define trigger criteria (schedules, caller types, or to specify phone numbers).
7. Click the Save button(s) to submit the data and exit the *Edit* view.

Edit Anywhere

1. Click on the *Edit* link next to the Anywhere listing.
2. Make changes to the *Phone Number* or *Selective Criteria* settings, as needed.
3. Click the Save button(s) to submit the changes and close.
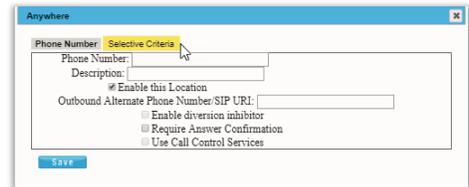
Delete Anywhere

Use caution. This action immediately removes the *Anywhere* number association and cannot be undone.

1. Click to place a check in the box ☑ next to the desired listing.
2. Click on the Delete button to remove the listing and return to Settings.

Remote Office

The Remote Office service allows you to redirect all calls to the phone number defined here. Use your home phone, cell phone, or even a hotel room phone as your business phone in conjunction with the *CommPilot Manager* application. When enabled, you can make phone calls and have them billed to your business.

Click the adjacent drop-down arrow ► to access this feature's *Edit* view.
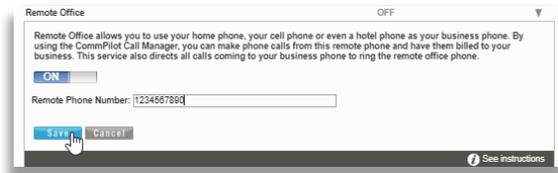
Manage Remote Office

1. Click to toggle the service ON or OFF.
2. Remote Phone Number: Enter a 10-digit phone number.
3. Click on the Save button.

Enterprise Directory

The Enterprise Directory feature offers an online listing of all phone service information within the basic Enterprise directory for the account. Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Print Enterprise Directory Summary

Click on the Enterprise Directory Summary Link to view a summary listing of the Phone List to print using your browser feature.

Print Enterprise Directory Details

Click on the Enterprise Directory Details link to view a detailed print-ready phone list.

Time Schedule

The **Time Schedule** feature allows users to schedule call behaviors (send to voicemail, etc.).
Click the adjacent drop-down arrow ► to access this feature's *Edit* view.

Add a Schedule

1. Click to place a checkmark ☑ next to the item.
2. Click the Add button for that option.
3. Enter a unique Schedule Name.
4. Click the Save button when finished.
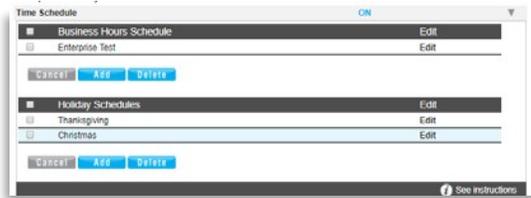
View a Schedule

Some schedules created by management are read-only and offer a View button for users who wish to review the schedule setup. Click View to open the dialog and see a schedule's current setup.

Delete a Schedule

Use caution. This action removes the schedule and any underlying events and cannot be undone.
1. Click within the checkbox ☑ adjacent to a *Schedule* to select it.
2. Click on the Delete button within that section to remove the Schedule and any events within it.

Add an Event

1. Click to place a check mark ☑ next to the preferred schedule option (Business Hours or Holiday).
2. Click Add Event.
3. Event Name – Type a short title for review in lists.
4. Define the following options as needed for a specific event type:
   - ❖ Start Date – select the date the event begins.
   - ❖ Select the All Day Event check box ☑, OR define the following:
   - ❖ Start Time, End Time, and/or End Date
   - ❖ Recurs – Select from Never, Daily, Weekly, Monthly by Day, Monthly by Week, Yearly by Day, Yearly by Week
   - ❖ Recur every X (Months or Year and/or the Numerical day of the month).
   - ❖ End – Select from *Never, After (x # of occurrences)*, or Date (and set the end date).
   - ❖ Start Announcement and End Announcement - *Optional.*
     Select a Start announcement from the drop-down list to use at the beginning of the period defined for the event. Select an End announcement from the drop-down list to play when the event is slated to stop.
     Note: An announcement defined for the End *may* play to callers if an announcement/ prompt is not defined for regular hours, none is specified at the start of the next event, or there are no other schedules with events that have prompts/announcements that will trigger to play at the time this event is slated to end.
     Note: This specialized and optional feature is only for use in Holiday Schedules and in tandem with Auto-Attendant Tree Holiday Prompts. It is not for use with Business Hours schedules. *Start and End announcements may be used with AA tree holiday prompt schedules in events that run during 1 single day (within the hours of 12:00am-11:59pm in one 24hour period).The Start and End announcements are not optimized for use in any other schedules, events set to be recurring, or for events that span multiple days and/or that are defined to cross the midnight hour. See also: Announcement Repository, Auto-Attendant Tree Holiday Prompts.*
5. Click Save when finished to submit the data and return to Settings.

Edit an Event

1. Click on the Edit link next to the desired Time Schedule option.
2. Make changes to the event name, date(s), time(s) or recurrences.
3. Click Save when finished to submit the changes and close the view.

Delete an Event

Use caution. This action immediately removes the event and cannot be undone.

1. Click within the checkbox ☑ adjacent to a Schedule to select it.
2. Click the Edit link next to the selected item to review the Schedule's events.
3. Click within the checkbox ☑ adjacent to an *Event* listing to select it.
4. Click on the Delete Event button and then click the Save button to update the data and exit.