



PBX Admin / Office Manager Guide



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PREFACE

Welcome to the PBX Admin / Office Manager Guide. Your Cloud PBX system includes a comprehensive set of administrator tools for configuring and managing the system. This guide describes how to use these features to optimize your Cloud PBX experience.

Document Conventions

This guide uses the following conventions to draw your attention to certain information.

Convention	Description
Note	Notes emphasize or supplement important points of the main text.
Bold	Indicates text on a window, other than the window title, including menus, menu options, buttons, fields, and labels.
<i>Italic</i>	Indicates a variable, which is a placeholder for actual text provided by the user or system. Angled brackets (< >) are also used to indicate variables.
screen/code	Indicates text that is displayed on screen or entered by the user.

Glossary Conventions

The first time a technical term is used in this guide, it appears as a hyperlink. Clicking the link in the electronic version of this document takes you to the Glossary where the term is defined. Clicking the term in the Glossary returns you to the first instance of the term.



1. ACCESSING THE ADMIN WEB PORTAL

Topics:

- ^ *Logging in to the Web Portal (page 7)*
- ^ *Understanding the Admin Portal Interface (page 8)*

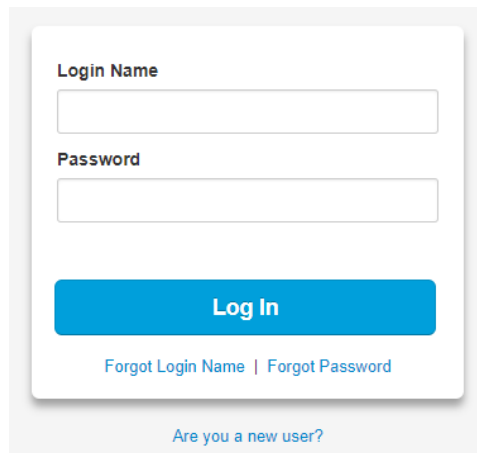
All administrator tasks are performed from the admin portal. The admin portal is a web-based application that runs on any device (mobile phone, tablet, or PC) running a browser.

You access the admin portal using the user portal login. After logging in to the user portal, users with admin permission can access the admin portal.

Logging in to the Web Portal

To log in to the web portal:

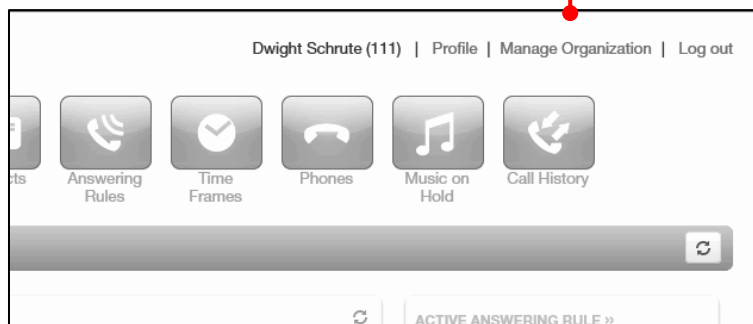
1. Launch a web browser.
2. Go to: <https://pbx.simplelogin.net>.
3. At the Login page:
 - Enter the **Login Name** (ext@cust-id) and **Password**. If you do not know your Login Name or Password use the applicable **Forgot Link**.
 - If you never received these details use the **New User** link.



The screenshot shows a login form with two input fields: "Login Name" and "Password". Below the fields is a blue "Log In" button. Underneath the button are two links: "Forgot Login Name" and "Forgot Password". At the bottom of the form is a link that says "Are you a new user?".

- You will first login to your Extension. Click the **Manage Organization** link to view and manage your entire PBX system.

Click this link.



Note: If the **Manage Organization** link does not appear, you do not have Office Manager permissions.

Understanding the Admin Portal Interface

The top of the admin portal interface contains a menu bar with icons for navigating through the portal (see Table 1-1). When you click an icon, the page associated with the icon appears in the dashboard. Some pages have tabs for accessing configuration settings.

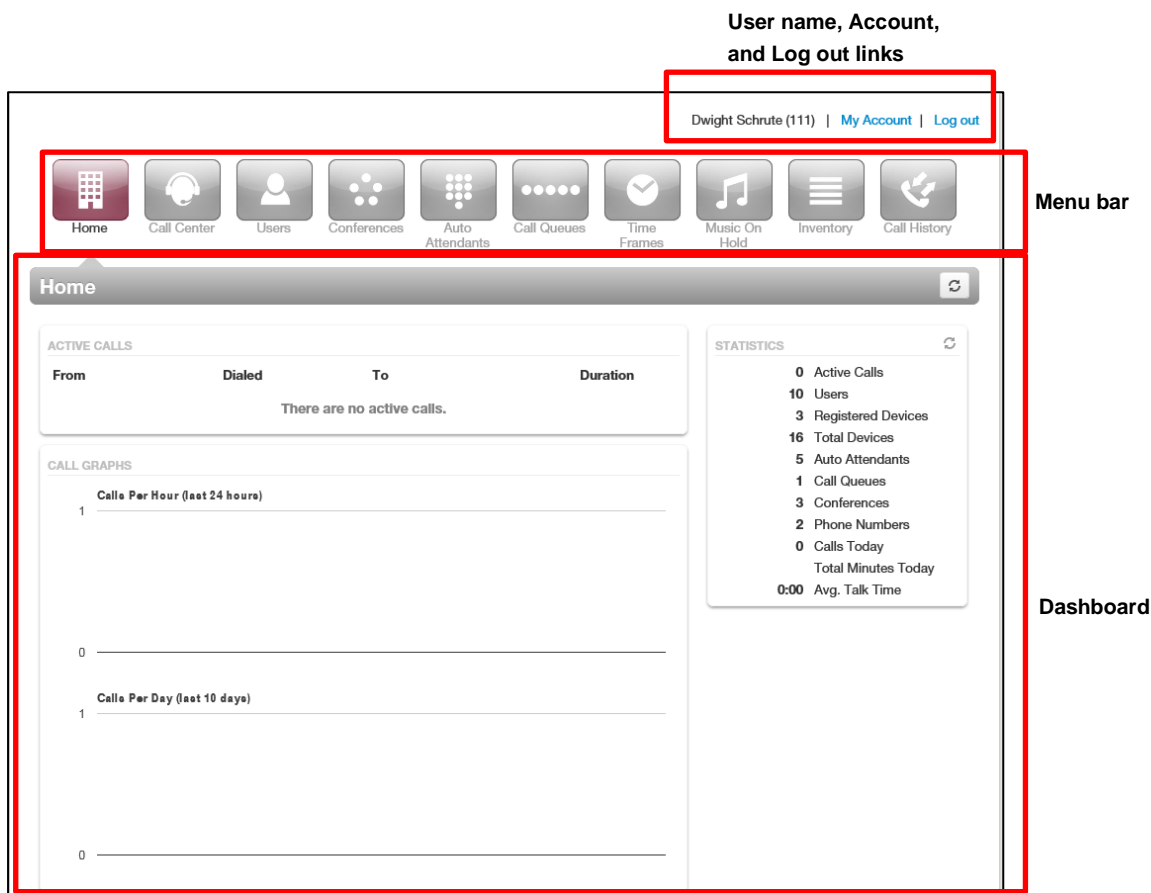










Table 1-1. Admin Menu Icons

Menu Icon	Description	See Chapter
 <p>Home</p>	Shows active call information such as graphs and statistics.	3
 <p>Users</p>	Shows users configured in the system, and allows you to add, edit, and import users.	4
 <p>Conferences</p>	Shows conferences configured in the system, and allows you to edit, delete, join a conference, and view conference statistics.	5
 <p>Auto Attendants</p>	Shows auto attendants configured in the system, and allows you to add, edit, and delete auto attendants.	6
 <p>Call Queues</p>	Shows call queues configured in the system, and allows you to add, edit, and delete call queues, add <u>Music On Hold</u> files to call queues, and configure agents associated with call queues.	7
 <p>Time Frames</p>	Shows all time frames configured in the system, and allows you to add, edit, and delete time frames and view time frame start and end times.	8
 <p>Music On Hold</p>	Shows all files that are part of the Music on Hold feature, and allows you to add, edit, and delete Music on Hold files, change the order in which files are played, and randomize the playing of the files.	9
 <p>Inventory</p>	Allows you to manage the phone numbers and phone hardware in the system.	10
 <p>Call History</p>	Allows you to review, filter, and export call <u>logs</u> for greater analysis.	11



2. QUICK GUIDE TO COMMON TASKS

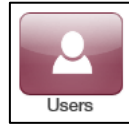
Topics:

- ^ *Resetting a Password (page 11)*
- ^ *Replacing Employees (page 11)*
- ^ *Moving a Phone (page 11)*
- ^ *Changing Open Hours (page 12)*
- ^ *Setting New Holidays (page 12)*
- ^ *Setting Call Forwarding (page 13)*
- ^ *Blocking a Caller (page 13)*

This chapter describes frequently performed tasks.

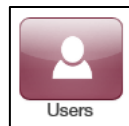
Resetting a Password

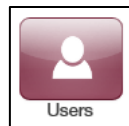


1. On the menu bar, click .
2. Click the name of the user that needs a password change.
 - Scroll down to the **Change Password** section, and then enter a new numeric password in the **New Password** and **Confirm New Password** fields.
 - Click **Save**.

Replacing Employees

If you have a new employee taking over an old employee's extension:




1. On the menu bar, click .
2. Click the name of the user being replaced.
3. Change the name, department, email address, and password, as appropriate, and then click **Save**.
4. To reset the mailbox for the new employee, click the **Voicemail** tab, scroll down to the **Data** section, click **Clear Data** followed by **Yes** at the confirmation prompt, and then click **Save**.

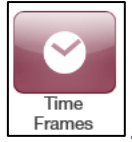
Moving a Phone

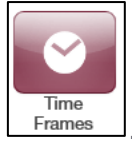
If a user changes offices, we recommend moving the phone. The user's extension will follow the phone. Otherwise, use the following procedure to reassign phones:



1. On the menu bar, click .
2. Click the **Phone Hardware** tab.
3. Click the MAC address of the appropriate phone.
4. In the pop-up window, reassign the extensions, and then click **Save**.

Changing Open Hours




1. On the menu bar, click .
2. Click the name of the time frame you want to edit.
3. In the pop-up window, change the **When** setting. Use the check boxes, sliders, and text fields to adjust the open hours rules, as appropriate.
4. Click **Save**.

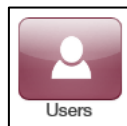
Setting New Holidays

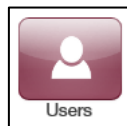
Setting new holidays is a 2-step procedure. First, create or edit a [time frame](#), and then configure user [answering rules](#) for that time frame.

1. Set the time frame:



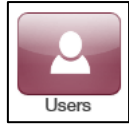
- a. On the menu bar, click .
 - b. Click **Add Time Frame** to add a new time frame or click the **Name** of the time frame you want to edit.
 - c. In the pop-up window, enter or edit the name for the holiday, click when it occurs, and use the check boxes, sliders, and text fields to adjust the rules, as appropriate.
 - d. Click **Save**.
2. Set the user answering rules:

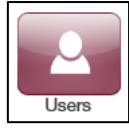



- a. On the menu bar, click .
- b. Click the **Name** of a user who needs the time frame applied to him.
- c. Click the **Answering Rules** link.
- d. Check to see whether the time frame already applies to that user. Otherwise click **Add Rule**.
- e. Using the **Time Frame** drop-down list, select the time frame you defined in step 1.
- f. Complete the other settings as appropriate (see
- g. Table 4-2 on page 27).

- h. Click **Save**.
- i. Reorder the time frames as needed to ensure the new rule will take precedence.

Setting Call Forwarding

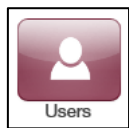


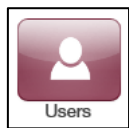
1. On the menu bar, click .
2. Click the name of the user you want to forward.
3. Click the **Answering Rules** tab.
4. Hover over a time frame, and then click the  icon.
5. In the pop-up window, select the appropriate call forwarding check box and enter the extension, number, or phone.

Note: Your main number usually is associated with a Static or Time of Day route. However, a User called the “Inbound Route” can be used for added functionality via the use of “Answering Rules”. For more information about Call Forwarding, see “Adding Answering Rules” on page 26.

6. Click **Save**.

Blocking a Caller



1. On the menu bar, click .
2. Click the name of the User that needs a block.
3. Click the **Answering Rules** tab.
4. Click the **Allow/Block** button.
5. In the pop-up window, enter the caller’s number under **BLOCKED NUMBERS**, and then click **+**.
6. Click **Done**.

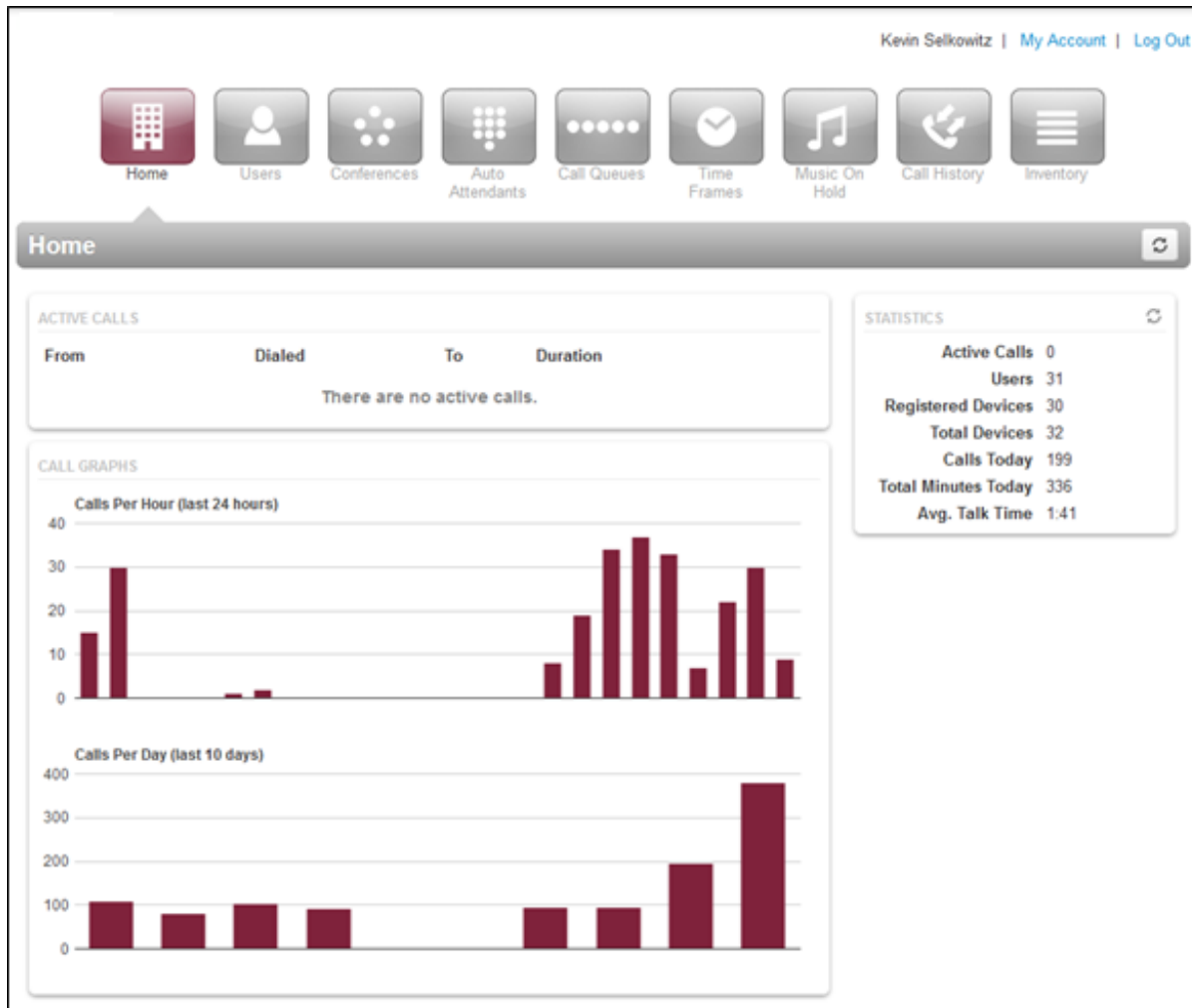


3. WORKING WITH ACTIVE CALLS

Topics:

- ^ *Call Graphs (page 15)*
- ^ *Statistics Panel (page 15)*

The Home page has an **ACTIVE CALLS** section that shows graphical and statistical information about current calls. This information updates automatically as active calls change.




Active Calls Page

Call Graphs

The left side of the Home page shows call graphs. These graphs display calls by hour and day, allowing you to see trends in system usage. For more information about call details, see “Viewing Call History” on page 103.

Statistics Panel

The right side of the Active Calls page has a **Statistics** panel that shows the status and activity of the system, as described in the following table. The  button at the top-right side of the panel allows you to update the statistics shown.

Statistics	Description
Active Calls	Number of calls that are currently active.
Users	Number of users on the system.
Registered Devices	Number of phones that are currently operational.
Total Devices	Total number of devices configured on your system.
Auto Attendants	Total number of auto attendants in the system.
Call Queues	Total number of call queues in the system.
Conferences	Total number of conferences in the system.
Phone Numbers	Number of phone numbers assigned to your system.
Calls Today	Number of calls dialed and received today.
Total Minutes Today	Total amount of talk time.
Avg. Talk Time	Average talk time per call.



4. WORKING WITH USERS

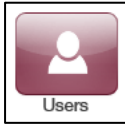
Topics:

- ^ *Displaying the Users Page (page 17)*
- ^ *Adding Users (page 19)*
- ^ *Editing Users (page 21)*
- ^ *Importing Users (page 38)*
- ^ *Deleting Users (page 39)*

Users are the extensions on your system. This chapter describes how to add, edit, and import users to the system. System users are users associated with queues, auto attendants, and other system features.

Displaying the Users Page

All user tasks are performed from the Users page. To display this page, click the **Users** icon on the menu bar:



The following figure shows an example of the Users page.

Name	Extension	Department
Jim Halpert	102	Sales
Angela Martin	120	Finance
Kevin Moynihan	1252	Finance
Darryl Philbin	130	Warehouse
Michael Scott	100	Engineering
John Smith	2468	HR

A search field at the top-left of the page allows you to search users by entering their name, extension, or department, and then clicking the magnifying glass icon:



To sort users by name, extension, or department, click a blue column header. The arrow next to column header shows whether the items are sorted in ascending (up arrow) or descending (down arrow) order.



The  button at the top-right side of the page refreshes the information on the page.

The bottom-left side of the page has controls to display the next or previous page. The bottom-right side has controls to hide system users and select the number of users shown per page.



Where to go from here:

From the Users page, you can:

- Add users. See “Adding Users” on page 19.
- Edit users. See “Editing Users” on page 21.
- Import users. See “Importing Users” on page 38.
- Delete users. See “Deleting Users” on page 39.

Adding Users

1. From the Users page, click the **Add User** button. An Add a User pop-up window similar to the following appears. (The options in your window might differ from the ones shown below.)

Add a User ×

First Name

Last Name

Extension **Note:** Cannot be changed

Department

Email Address(es) +

User's Scope ▼

Enable Voicemail

Add Phone Extension

New Password

Note: Password must be numbers only.

Confirm New Password

- Complete the fields (see Table 4-1).
- Click **Add User**.

Table 4-1. Adding/Editing a User

Setting	Description
First Name	Enter the user's first name. The <u>dial-by-name directory</u> can match on this field, but will by default match Last Name.
Last Name	Enter the user's last name. The dial-by-name directory can match on this field.
Extension	Enter the user's extension.
Department	Enter the department to which the user belongs.
Time zone	Enter the user's time zone.
Email Address(es)	Enter the user's address used for email, password resets, etc. To add email addresses, click the green plus icon.
User's Scope	<p>Select the user's access level. Choices are the following (your selections might be different):</p> <ul style="list-style-type: none"> • Basic user • Office manager • Call center agent (may not appear in your drop-down list) • Call center supervisor (may not appear in your drop-down list)
Enable Voicemail	<p>Enable or disable <u>voicemail</u>. Choices are:</p> <ul style="list-style-type: none"> • Checked = enable voicemail. • Not checked = disable voicemail.
Add Phone Extension	<p>This setting allows you to add a phone extension. Phone extensions allow users to be associated with a phone. A user can have one or more phone extensions. For example, user 111 could have three phones designated as 111a, 111b, and 111c. If you check this check box, you can then associate a phone to the user (see Table 10-3 on page 100). Choices are:</p> <ul style="list-style-type: none"> • Checked = add phone extension. • Not checked = do not add phone extension.
New Password	Enter a new numeric login password for the user. For security, each typed password character is masked by a dot (●).
Confirm New Password	Enter the same numeric login password you entered in the New Password field. For security, each typed password character is masked by a dot (●).


Editing Users

There might be times when you need to edit users. For example, you might need to change names, passwords, answering rules, voice mail, or phone settings.

1. From the Users page, either:













- Click a name

OR

- Hover over a user name, click the  icon at the far right of the Users page, and then click **Profile**. For example:

Click a name or...

...click this icon and...

Name ^	Extension	Department	
Jim Halpert	102	Sales	 
Angela Martin	120	Finance	 
Kevin Moynihan	1252	Finance	 
Darryl Philbin	130	Warehouse	 
Michael Scott	100	Engineering	 
John Smith	2468	HR	 

...click this selection

Where to go from here:


When a page similar to the following appears, use the tabs to configure the settings for this user:

- Use the **Profile** tab to configure profile, caller ID, dial planning, and login password for the selected user. See “Configuring the User Profile” on page 22.
- Use the **Answering Rules** tab to configure time frames and answering rules for the selected user. See “Configuring User Answering Rules” on page 24.
- Use the **Voicemail** tab to configure voicemail settings for the selected user. See “Configuring User Voice mail” on page 31.
- Use the **Phones** tab to configure the phones associated with the selected user. See “Configuring Phones” on page 35.

Configuring the User Profile

To configure the profile for the selected user, complete the fields in the **Profile** tab, and then click **Save**.

Note: The options in your tab might be different than the ones shown below.

Users / Jim Halpert (102) 

Profile [Answering Rules](#) [Voicemail](#) [Phones](#)

Profile Information


First Name

Last Name

Login Name

Department

Timezone

Email Address(es) 

Record User's Calls

Directory Options Announce in Audio Directory
 List in Directory

Caller ID Information

Area Code

Caller ID

911 Caller ID

Dial Planning

Dial Permission

Change Password

New Password **Note:** Password must be numbers only.

Confirm New Password

Working with Users

Setting	Description
Profile Information	
First Name	Enter the user's first name.
Last Name	Enter the user's last name. The user's last name is particularly important for the dial-by-name directory, as it matches on this field.
Login Name	Read-only field that shows the login name this user uses to log in to the portal.
Department	Enter the department to which the user belongs.
Time zone	Enter the user's time zone.
Email Address(es)	Enter the user's address used for email, password resets, etc. To add email addresses, click the green plus icon.
Record User's Calls	Select whether the calls for this user will be recorded (Yes) or not recorded (No).
Directory Options	Enables or disables announce in auto directory and list in directory features. <ul style="list-style-type: none"> • Announce in Audio directory = check to include the user in the dial-by-name directory. • List in Directory = check to add user to the internal extensions list (contacts).
Caller ID Information	
Area Code	Area code associated with the user.
Caller ID	Caller ID numbers that will be displayed for this user.
911 Caller ID	Caller ID number sent when calling 911. This may be different than your regular caller ID.
Dial Planning	
Dial Permission	Select the dialing permissions for the user.
Change Password	
New Password	Enter a new numeric login password for the user. For security, each typed password character is masked by a dot (●).
Confirm New Password	Enter the same numeric login password you entered in the New Password field. For security, each typed password character is masked by a dot (●).

Configuring User Answering Rules

Answering rules define how calls to this extension are handled. To configure answering rules for the selected user:

1. From the Users page, click the **Answering Rules** tab. A page similar to the following appears.

The screenshot shows the 'Answering Rules' configuration page for user Jim Halpert (102). The page has a breadcrumb 'Users / Jim Halpert (102)' and tabs for 'Profile', 'Answering Rules', 'Voicemail', and 'Phones'. Below the tabs, there is a 'Ring for' dropdown menu set to '45' seconds, and two buttons: 'Allow / Block' and 'Add Rule'. A table lists the answering rules:

Time Frame	Description	
Holidays	Simultaneously ring x102, x111, x111a, (425) 200-7345	
Default Active	Simultaneously ring x102	

At the bottom of the page, a grey box contains the text: "When no answering rules are in effect, calls will ring your extension by default."

- Use the **Ring for** drop-down list to select the maximum number of seconds that incoming calls ring for this user before the system routes the call to the user's voicemail or the **Forward if Unanswered** option, if configured.
- From this page, you can:
 - Allow or block calls for this user (see "Allowing or Blocking Calls" on page 25).
 - Add answering rules for this user (see "Adding Answering Rules" on page 26).
 - Change the active rule for this user (see "Changing the Active Answering Rule" on page 28).
 - Edit answering rules for this user (see "Editing Answering Rule" on page 30).
 - Deleting answering rules for this user (see "Deleting Answering Rules" on page 31).

Allowing or Blocking Calls

To allow or block calls for this user:

1. Click the **Allow/Block** button. The Allow/Block pop-up window appears.

The screenshot shows a pop-up window titled "Allow / Block" with a close button in the top right corner. The window is split into two columns. The left column is titled "ALLOWED NUMBERS" and contains an input field with the placeholder text "Enter a number" and a plus sign button to its right. Below this is a scrollable list area. The right column is titled "BLOCKED NUMBERS" and also contains an input field with the placeholder text "Enter a number" and a plus sign button to its right. Below this is another scrollable list area. At the bottom of the "BLOCKED NUMBERS" section, there is a checkbox labeled "Block anonymous or unknown". A "Done" button is located at the bottom right of the window.

- Calls from allowed numbers bypass call screening and server side Do Not Disturb (not phone DND). To allow numbers for this user, enter a number in the **Enter a number** field under **ALLOWED NUMBERS**, and then click the plus sign next to this field. Repeat this step for each additional number you want to allow for this user.
- Calls from blocked numbers receive a fast busy or number disconnected message. To block numbers for this user, enter a number in the **Enter a number** field under **BLOCKED NUMBERS**, and then click the plus sign next to this field. Repeat this step for each additional number you want to block for this user.
- To block anonymous or unknown numbers, check **Block anonymous or unknown**.
- Click **Done**.

Adding Answering Rules

Adding additional answering rules allows you specify alternate call answering rules in a different time frame (for example, handle calls differently on a weekend than on a weekday).

To add an answering rule for this user:

1. Click the **Add Rule** button. The Add an Answering Rule pop-up window appears.

The screenshot shows a pop-up window titled "Add an Answering Rule" with a close button (X) in the top right corner. The window contains the following settings:

- Time Frame:** A dropdown menu with the text "Select a time frame" and a downward arrow. To its right is the text "This is when your answering rule will apply".
- Do not disturb:** An unchecked checkbox.
- Call screening:** An unchecked checkbox.
- Call Forwarding:** A section with five options, each with an unchecked checkbox and a text input field:
 - Always:** Extension, number or phone
 - On Active:** Extension, number or phone
 - When busy:** Extension, number or phone
 - When unanswered:** Extension, number or phone
 - When offline:** Extension, number or phone
- Simultaneous ring:** An unchecked checkbox. To its right are three options:
 - Include user's extension:** A checked checkbox.
 - Ring all user's phones:** An unchecked checkbox.
 - Answer confirmation for offnet numbers:** An unchecked checkbox.
- Extension, number or phone:** A text input field with a clock icon and a "0" next to it, and a green plus icon to its right.
- Just ring user's extension:** A checked checkbox.

At the bottom right of the window are two buttons: "Cancel" and "Save".

- Complete the settings in the Add an Answering Rule pop-up window.

Table 4-2. Adding/Editing Answering Rules

Setting	Description
Time Frame	Select a time frame to which this answering rule will be applied. Choices shown are the ones previously configured using the procedure under "Adding Time Frames" on page 80.
Enabled	Add an answering rule: this check box does not appear. Edit an answering rule: enable (check) or disable (uncheck) this time frame for this user.
Do not disturb	Enables or disables the Do Not Disturb feature. Choices are: <ul style="list-style-type: none"> • Checked = enable Do Not Disturb. Send all calls directly to voicemail (if available), without ringing the phone. • Not checked = disable Do Not Disturb.
Call screening	Enables or disables the Call Screening feature. Choices are: <ul style="list-style-type: none"> • Checked = enable Call Screening. System prompts callers to say their name, and then lets you screen the call before accepting it. • Not checked = disable Call Screening.
Call Forwarding options	Select the following appropriate Call Forwarding settings. When entering another extension as a Call Forward option, a drop-down menu allows you to forward the call to specific resources associated with that extension (see Table 4-3). Some settings might not appear, depending on the features associated with the given extension. Choices are: <ul style="list-style-type: none"> • Always = immediately forward calls to the number specified in the text field. • When busy = forward calls to the number specified in the text field when your extension has used all available call paths. • When unanswered = forward calls to the number specified in the text field if the call is not answered after the specified ring timeout. • When offline = automatically forward calls to the number specified in the text field if your desk phone has lost communication (for example, during a power outage).
Simultaneous Ring	<p>Simultaneous ring allows multiple phones to ring at the same time. Check boxes allow you to include the user's extension, ring all user phones at the same time, and use answer confirmation for offnet numbers.</p> <ul style="list-style-type: none"> • Include user's extension = check to ring the phone with the same extension as the user. • Ring all user's phones = ring all phones associated with this user at the same time. • Answer confirmation for offnet numbers = ensures when conducting a simring to a cell/landline that the answering party is a person instead of voicemail by requesting them to press 1 to accept the call. <div data-bbox="215 1696 722 1774" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <input type="text" value="Extension, number or phone"/> 🕒 0 + </div> <p>In this field, you can enter the extension of another telephone you want to ring.</p> <p>The clock icon allows you to specify a ring delay. A ring delay allows you to enter the amount of time before the call rings at the destination. To add other phones to the simring, click the green plus icon.</p>

Setting	Description
Just ring user's extension	<p>Enables or disables the ringing of your telephone only.</p> <ul style="list-style-type: none"> • Checked = incoming call rings just your telephone. • Not checked = feature is disabled.

Table 4-3. Call Forward Selections

Selection	Description
User	Forward calls to the user at the specified extension and follow their user-answering rules.
Handset	Bypass the user-answering rules and forward calls to the <u>handset</u> associated with the specified user.
Voicemail	Forward calls to voicemail at the specified extension.
Queue	Forward calls to the queue associated with this user.
Auto attendant	Forward calls to the auto-attendant associated with this user.

- Click **Save**.
- Repeat this procedure to add answering rules for this user.

Changing the Active Answering Rule

You can define multiple answering rules, but only one rule can be active at a time. The active rule is the first rule with a matching time frame. Best practices dictate that you order answering rules according to how specific they are, with the most specific time frames (for example, Holidays) at the top.

Assume today is Monday, July 4th. In this example, the **Holidays** and **Open** time frames could match the time and date conditions for July 4th. If **Holidays** is the first rule, however, it becomes the active rule. But if **Open** is the first rule, **Open** becomes the active rule.

To specify a rule other than the top one as the active rule:

1. In the **Answering Rules** tab, find the rule you want to designate as the active rule.
 - On the left side of the **Answering Rules** tab, hover the mouse over the up/down arrows for that rule (the pointer changes to a 4-headed arrow).



- Hold down your mouse button, drag the rule to the top row, and then release the mouse button. A message tells you that the answering rules have been reprioritized and prompts you to click **Save**.

Message that active rule has been reprioritized

You have reprioritized your answering rules. When you are done, save the changes you have made.


Time Frame	Description
⬆️ Holidays	Simultaneously ring x102, x111, x111a, (425) 200-7345
⬆️ Open Active	Simultaneously ring x102

- Click **Save**. The **Active** designation appears next to the topmost time frame.

Time Frame	Description
⬆️ Holidays Active	Simultaneously ring x102, x111, x111a, (425) 200-7345
⬆️ Open	Simultaneously ring x102

Editing Answering Rules

To edit an answering rule for this user:

1. In the **Answering Rules** tab, hover over the answering rule, and then click the  icon at the far right of the row.

Click this icon

Default Active	Simultaneously ring x102		
Holidays	Simultaneously ring x102, x111, x111a, (425) 200-7345		

The Edit Answering Rule pop-up window appears.

Edit Answering Rule

Time Frame: This is when your answering rule will apply

Enabled

Do not disturb

Call screening

Call Forwarding

Always

On Active

When busy

When unanswered

When offline

Simultaneous ring

Include user's extension

Ring all user's phones


Answer confirmation for offnet numbers

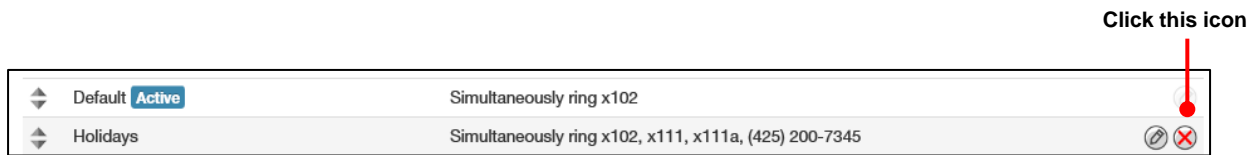
Just ring user's extension

- Change the rule, as appropriate. For assistance, see Table 4-2 on page 27.
2. Click **Save**.

Deleting Answering Rules

If you no longer need an answering rule for a user, you can delete the rule. You can delete any answering rule, except the default rule.

1. In the **Answering Rules** tab, hover over the answering rule, and then click the  icon at the far right of the row.



A confirmation prompt appears.

2. Click **Yes** to delete the rule or **No** to retain it.

Configuring User Voice mail

To configure voice mail for the selected user:

1. From the Users page, click the **Voicemail** tab. A page similar to the following appears.

Users / Jim Halpert (102)

Profile
Answering Rules
Voicemail
Phones

Enable Voicemail

Inbox

Options

Sort voicemail inbox by latest first

Announce voicemail received time

Announce incoming call ID

Operator Forward

Number of Messages [Clear messages](#)

Data

Limit

Used [Clear data](#)

Greetings

Voicemail Greeting

Recorded Name

Unified Messaging

Email Notification




Options



Send email when mailbox is full

Send email after missed call

- Complete the settings in the **Voicemail** tab.

Table 4-4. Voicemail Settings

Setting	Description
Enable	Enable (check) or disable (uncheck) voicemail.
Inbox	
Options	<p>This setting affects audio voicemail (calling into voicemail), but does not affect the web portal voice messages. Check the appropriate inbox options. Choices are:</p> <ul style="list-style-type: none"> • Sort Voicemail inbox by latest first = plays newest messages first. • Announce voicemail received time = plays the timestamp of the message. • Announce incoming call ID = plays the caller ID number if available.
Operator Forward	<p>This setting determines where a call is sent if the caller presses 0 while the voicemail greeting is being played. When using this feature, tell callers near the beginning of your recorded voicemail greeting that they can press 0 to redirect their call.</p>
Number of Messages	<p>Read-only field that shows the current count of messages. Click the Clear messages link to delete messages, but leave greetings in place.</p>
Data	
Limit	<p>Read-only field that shows user's storage limit.</p>
Used	<p>Read-only field that shows user's used storage. Click the Clear data link to delete all messages, greetings, and the name recording.</p>
Greetings	
Voicemail Greeting	<p>To select an active voicemail greeting, click a greeting from the drop-down list.</p> <p>To play the selected greeting, click the  icon.</p> <p>To download the selected greeting, click the  icon.</p> <p>To upload or record a greeting, click the  icon to display the Manage Greetings pop-up window. Greetings must be in MP3 or WAV format.</p> <p>To upload a greeting:</p> <ol style="list-style-type: none"> 1. Next to New Greeting, click Upload. 2. Use the Browse button to select the file. 3. In the Greeting Name field, enter a name for the greeting. 4. Click Save and Done. <p>To record a greeting:</p> <ol style="list-style-type: none"> 1. Next to New Greeting, click Record. 2. In the Call me field, enter number to call (either an extension or a telephone number such as your cell phone). 3. In the Greeting Name field, enter a name for the greeting. 4. Click Call. Your phone will be called. At the prompt, record the new greeting, and then press # when you finish your recording. 5. Click Done. (Or click Add Greeting to add another greeting.)

Setting	Description
Recorded Name	<p>If your company has a dial-by-name directory, you must record your name to appear in the directory. Click the  icon to listen to your current name recording on your computer or click the  icon to upload or record a new greeting.</p>
Unified Messaging	
Email Notification	<p>Adjust your voicemail to email settings. Choices are:</p> <ul style="list-style-type: none"> • None = no emails when voicemail is left. • Send w/ Hyperlink = system sends an email to this user with a link to the voicemail • Send w/ Brief Hyperlink = system sends an email to this user in plaintext with a link to the voicemail • Send w/ Attachment (storage option) = system sends an email to this user with the audio file of the message attached. The storage option lets this user leave messages in his inbox as new, move to saved, or move to trash. • Send w/ Brief Attachment (storage option) = system sends an email to this user in plaintext with the audio file of the message attached. The storage option lets this user leave messages in his inbox as new, move to saved, or move to trash.
Options	<p>Check the appropriate unified messaging options. Choices are:</p> <ul style="list-style-type: none"> • Send email when inbox is full = system sends an email if this user's voice mail inbox runs out of space. • Send email after missed call = system sends an email if this user missed a call.

2. Click **Save**.

Configuring Phones

To associate phones with the selected user:

1. From the Users page, click the **Phones** tab. A page similar to the following appears.

Registered	Name	Device Type	IP Address	MAC Address	Line
X	1005b	Panasonic_KX-UTG300B/03.137	66.185.162.140:5080	08:00:27:00:00:00	3
X	1005a	Polycom WXX 600 Test		08:00:27:00:00:00	1

Where to go from here:

From the **Phones** tab, you can:

- Associate a phone with this user (see “Associating Phones with This User” on page 36).
- Edit phones associated with this user (see “Editing Phones” on page 37).
- Delete phones associated with this user (see “Deleting Phones” on page 38).

Associating Phones with This User

To associate phones with this user:

1. Click the **Add Phone** button. The Add a Phone pop-up window appears.

Add a Phone [X]

Phone Name

Note: Phone Name cannot be changed

Record Calls ▼

Model ▼

Preferred Server ▼

- Complete the settings in the Add a Phone pop-up window.

Table 4-5. Adding/Editing Phones

Setting	Description
Phone Name	Adding a phone: Enter a name for this phone. The name should allow you to differentiate this phone from other phones you associated. For example, if you add phones for x111, you can name them 111a, 111b, and so on. Editing a phone: read-only field that shows the name of the phone.
Record Calls	Select whether calls will be recorded (Yes) or not recorded (No).
Model	Select the telephone model. The remaining settings in the window change depending on the model selected.
Preferred Server	Select the preferred server with which the phone will be used.

- Click **Add**.
- Repeat this procedure to associate additional phones with this user.
- After you configure all phones, reboot the phones to apply these settings.

Editing Phones

To edit a phone associated with this user:

1. From the **Phones** tab, either:





- Click a name

OR

- Hover over a name, and then click the  icon at the far right of the page. For example:

Click a name or...

...click this icon

Registered	Name	Device Type	IP Address	MAC Address	Line	
X	1005b	Panasonic_KX-UTG300B/03.137	66.185.162.140:5080	080020154B-4C3B	3	 
X	1005a	Polycom_VX 600 Test		080020154B-4C3B	1	 

Either step displays the Edit Phone pop-up window.

Edit Phone ✕

Phone Name

Note: Phone Name cannot be changed

Record Calls ▼

Model ▼

Preferred Server ▼

MAC Address


Line Number ▼


The line number on which this phone will reside.







2. Change the phone settings, as appropriate. For assistance, see Table 4-5 on page 36.
3. Click **Save**.

Deleting Phones

If you no longer need a phone that is associated with this user, you can delete the phone.

1. In the **Phones** tab, hover over the phone, and then click the  icon at the far right of the row. A confirmation prompt appears.
2. Click **Yes** to delete the phone or **No** to retain it.

Click this icon 

Registered	Name	Device Type	IP Address	MAC Address	Line	
	1005b	Panasonic_KX-UTG300B/03.137	66.185.162.140:5060	0800-0000-0000-0000	3	 
	1005a	Polycom WX 600 Test		0800-0000-0000-0000	1	 

Importing Users

A quick way to add users into the system is by importing them. The system accepts users in comma-separated-value (CSV) format. As part of this procedure, you can download a CSV-formatted template that can be opened using Microsoft Excel, populate the template with users, and then import the template.

1. From the Users page, click the **Import** button. The Import Users pop-up window appears.





2. To download a template that you can populate and import into the system:
 - a. Click the **Download Template** button.
 - b. Save the template to an area you can access.
 - c. Open the template, populate it with users, and then save the template.





3. Click the **Browse** button, navigate to the location where the file containing the users to be imported is located, click the file, and then click **Open**.
4. Click **Upload**. The system shows a preview of the data to be imported and allows you to edit the values if needed.

Deleting Users

If you no longer need a user, you can delete the user from the system.

1. From the Users page, hover over the user, and then click the  icon at the far right of the row. A confirmation prompt appears.
2. Click **Yes** to delete the user or **No** to retain it.

Click this icon 

Name ^	Extension	Department	
reseller access	800		 
Jim Halpert	102	Sales	 



5. WORKING WITH CONFERENCES

Topics:


- ^ *Displaying the Conferences*
Page (page 41)
- ^ *Adding Conferences* (page 42)
- ^ *Editing Conferences* (page 44)
- ^ *Deleting Conferences* (page 46)
- ^ *Joining a Conference* (page 46)
- ^ *Viewing Conference Statistics*
(page 47)

Your Cloud PBX system includes a conference bridge that allows people inside and outside your company to participate in a conference call.

Displaying the Conferences Page

All conference tasks are performed from the Conferences page. To display this page, click the **Conference** icon on the menu bar:



The following figure shows an example of the Conferences page. The  button at the top-right side of the page refreshes the information on the page.

Name ^	Extension/Owner	Participants	Minimum to Start	Leader Required	Request Name	
Corporate Meeting Room	800	0	1	✓	✗	
Small Meeting Room	102	0	2	✓	✗	
Zeus	9878	0	1	✗	✗	

Where to go from here:

From the Conferences page, you can:

- Add conferences. See “Adding Conferences” on page 42.
- Edit conferences. See “Editing Conferences” on page 44.
- Delete conferences. See “Deleting Conferences” on page 46.
- Join a conference. See “Joining a Conference” on page 46.
- View conference statistics. See “Viewing Conference Statistics” on page 47.

Adding Conferences

The following procedure describes how to add conferences. When adding a conference, we recommend you require a leader to start the conference; otherwise, anyone with your participant code can use your bridge.

1. From the Conferences page, click the **Add Conference** button. The Add a Conference pop-up window appears.

Add a Conference ×

Name

Type Dedicated conference bridge
 Owned conference bridge

Extension **Note:** Extension cannot be changed

Direct Phone Number ▼

Leader PIN

Participant PIN

Minimum participants to start ▼

Options Require a Leader to start
 Prompt all participants for their name
 Announce participant arrivals/departures

- Complete the fields (see Table 5-1).
- Click **Add Conference**.

Table 5-1. Adding/Editing a Conference

Setting	Description
Name	Enter a name for this bridge. The name should allow you to differentiate this bridge from other bridges you configured.
Type	Select the conference type. Choices are: <ul style="list-style-type: none"> • Dedicated conference bridge = a shared bridge on its own dedicated extension. • Owned conference bridge = a bridge associated to a user on the system (for example, the bridge for user 111).
Extension	Adding a conference: select the extension used to join this conference. Editing a conference: read-only field that shows the extension.
Direct Phone Number	Select the phone number used to join the conference. Owned bridges also have a direct dial field, which is the number internal users can dial to access the bridge.
Leader PIN	Enter the personal identification number (PIN) that the leader will use to authenticate access when joining the meeting. This PIN is private and should be known by internal staff only.
Participant PIN	Enter the PIN that participants will use to authenticate access when joining the meeting. Distribute this PIN to all guests of the meeting.
Minimum participants to start	Select the minimum number of participants that must attend the conference before it can start.
Options	Select the following options: <ul style="list-style-type: none"> • Require a Leader to start = when checked, the system requires a leader to start the conference. If unchecked, the conference call will start when the first participant joins, regardless of whether a leader is present. • Prompt all participants for their name = when checked, the system prompts users for their name when they call in to the conference call. • Announce participant arrivals/departures = when checked, the system either beeps or announces when a participant joins or leaves the conference.

- Click **Save**.

Editing Conferences

There might be times when you need to edit conferences. For example, you might want to change the leader or participant PIN.

1. From the Conferences page, either:



- Click a name

OR

- Hover over a name, and then click the  icon at the far right of the Conferences page. For example:

Click a name or...

...click this icon

Name ^	Extension/Owner	Participants	Minimum to Start	Leader Required	Request Name	
54654	9878	0	1	X	X	  
Jim Conference	102	0	2	✓	X	  
Test	800	0	1	✓	X	  


Either step displays the Edit pop-up window. For example:

Edit 54654 ✕

Name


Type Dedicated conference bridge

Extension
Note: Extension cannot be changed

Direct Phone Number(s) 

Leader PIN

Participant PIN


Minimum participants to start 

Options Require a Leader to start
 Prompt all participants for their name
 Announce participant arrivals/departures

- Complete the fields (see Table 5-1 on page 43).
- Click **Save**.

Deleting Conferences

If you no longer need a conference, you can delete it from the system.

1. From the Conferences page, hover over the conference, and then click the  icon at the far right of the row. A confirmation prompt appears.
2. Click **Yes** to delete the conference or **No** to retain it.

Click this icon 

Name ▲	Extension/Owner	Participants	Minimum to Start	Leader Required	Request Name	
54654	9878	0	1	✘	✘	
Jim Conference	102	0	2	✔	✘	
Test	800	0	1	✔	✘	

Joining a Conference


There are several ways to join a conference.

- Phones in your system can dial a dedicated bridge via the extension of the bridge. An owned bridge can be dialed by using the configured Direct Dial code.
- Set a Direct Inward Dial (DID) number to the bridge for inside and outside callers (see “Working with Inventory“ on page 92).
- Participants can call into your main number, and then be transferred to the bridge, or the bridge can be an option of the auto attendant.

When joining, the system prompts you for your password (either the leader or participant PIN, depending on your role).

Viewing Conference Statistics

You can display historical information about your bridge.

1. From the Conferences page, hover over the conference, and then click the  icon at the far right of the row.

Click this icon

Name ▲	Extension/Owner	Participants	Minimum to Start	Leader Required	Request Name	
54654	9878	0	1	✗	✗	  
Jim Conference	102	0	2	✓	✗	  
Test	800	0	1	✓	✗	  

A pop-up window shows statistics about the selected conference.

Reports for NS Training Bridge ✕

Date	Duration	Participants
Jun 26th, 9:59am	5:39	3
Jun 25th, 1:00pm	14:27	3

Close

- For more information about participants, click the hyperlink under the **Participants** column.

- When you finish viewing the information, click **Close** to close the pop-up window.



6. WORKING WITH AUTOMATED ATTENDANTS

Topics:

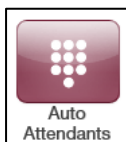
- ^ *Displaying the Auto Attendants Page (page 50)*
- ^ *Adding Auto Attendants (page 51)*
- ^ *Editing Auto Attendants (page 56)*
- ^ *Deleting Auto Attendants (page 58)*
- ^ *Auto Attendant Best Practices (page 58)*


Automated attendants (“auto attendants”) are automated greetings with options to route calls. The Cloud PBX system has an auto attendant builder that gives you easy access to change recordings and options anytime.

The Auto Attendants list displays each auto attendant. From the Auto Attendants List, you can edit auto attendant settings and record the auto attendant greeting.

Displaying the Auto Attendants Page

All auto attendant tasks are performed from the Auto Attendants page. To display this page, click the **Auto Attendants** icon on the menu bar:



The following figure shows an example of the Auto Attendants page. The  button at the top-right side of the page refreshes the information on the page.

Name	Extension	
Working Hours	111	
Main Autoattendant	500	

Where to go from here:

From the Auto Attendants page, you can:

- Add attendants. See “Adding Conferences” on page 42.
- Edit attendants. See “Editing Conferences” on page 44.
- Delete attendants. See “Deleting Conferences” on page 46.

Adding Auto Attendants

The following procedure describes how to add auto attendants.

1. From the Auto Attendants page, click the **Add Attendant** button. The Add an Auto Attendant pop-up window appears.

Add an Auto Attendant ×

Name

Extension

Note: Extension cannot be changed

Time Frame ▼

- Complete the fields (see Table 6-1).



Table 6-1. Adding/Editing an Auto Attendant (Page 1)











Setting	Description
Name	Enter a name for this auto attendant. The name should allow you to differentiate this auto attendant from other auto attendants you configured.
Extension	Adding an auto attendant: select the extension used with this auto attendant. Editing an auto attendant: read-only field that shows the extension.
Time Frame	Select a time frame to which this answering rule will be applied. Choices shown are the ones previously configured using the procedure under “Adding Time Frames” on page 80.

- Click **Continue**. A page similar to the following appears.

- Complete the fields (see Table 6-2).

Table 6-2. Adding/Editing an Auto Attendant (Page 2)

Setting	Description
Auto Attendant Name	This is the auto attendant name you entered on the previous page. Use this field to change the name if desired.
Extension	Read-only field that shows the extension associated with this auto attendant that you entered on the previous page.
Intro Greetings	Click the  icon to display the Manage Greetings pop-up window and play, upload, record, or delete greetings. See “Recording Intro Greetings and Menu Prompts” on page 53).
Menu Prompt	Click in the text box or click the  icon to upload or record a menu prompt (see “Recording Intro Greetings and Menu Prompts” on page 53).

<p>Dial Pad Menu</p>	<p>Routes calls to one of a variety of resources when a caller selects that option. Click a number, and then select an application from the following pop-up:</p> <div data-bbox="214 277 1390 426" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Choose a new application:</p> <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;"> User</div> <div style="text-align: center;"> Conference</div> <div style="text-align: center;"> Call Queue</div> <div style="text-align: center;"> Directory</div> <div style="text-align: center;"> Voicemail</div> <div style="text-align: center;"> Voicemail Management</div> <div style="text-align: center;"> External Number</div> <div style="text-align: center;"> Play Message</div> <div style="text-align: center;"> Repeat Prompt</div> <div style="text-align: center;"> Add Tier</div> </div> </div> <ul style="list-style-type: none"> • User = goes to a user (extension). • Conference = goes to a conference bridge. • Call Queue = goes to a call queue. • Directory = goes to a dial by name directory. • Voicemail = goes to a specific mailbox. • Voicemail Management = allows outside staff to call in and retrieve voicemail. • External Number = forwards to an external telephone number (for example, to send caller to on-call staff). • Play Message = commonly used for hours and directions. • Repeat Prompt = replays the menu of options to the caller. Add Tier = adds a submenu with a new greeting and set of options.
<p>Options</p>	<p>Click this button to open a pop-up window with the following options. Click Done when finished.:</p> <ul style="list-style-type: none"> • Enable dial by extension = enable (check) or disable (uncheck) dial by extension. • If no key is pressed = sets the default action if no key is pressed. • If unassigned key is pressed = sets the action if an unassigned key is pressed.

- Click **Save**.

Recording Intro Greetings and Menu Prompts

Each auto attendant can have an optional introductory greeting that plays when a call is directed to the auto attendant followed by the menu prompt. An example of an introductory greeting might be:


"Thank you for calling Acme Corporation. You've reached us outside normal business hours."

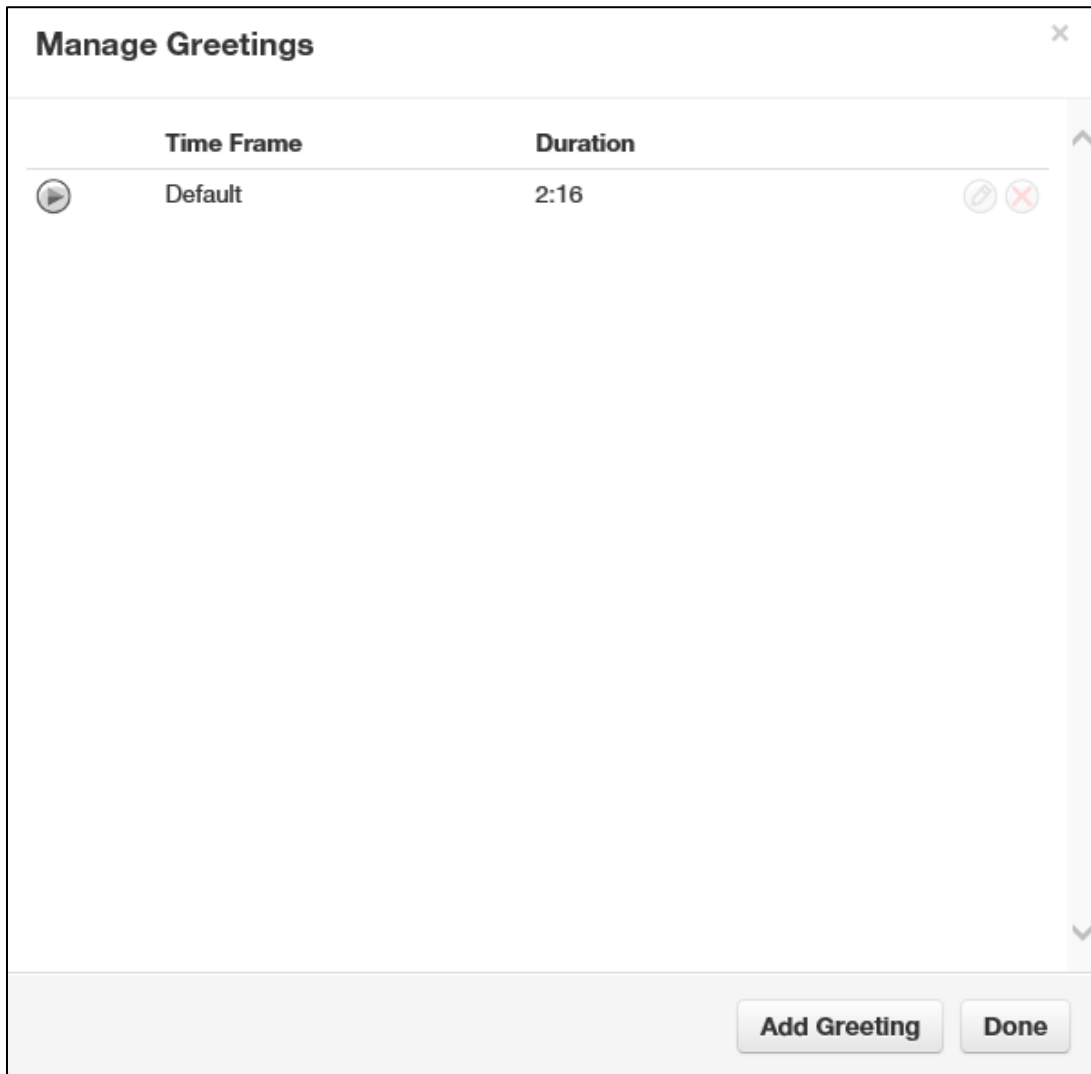
A menu prompt might be:

"Press 1 for sales, press 2 for marketing, or press 0 for operator assistance."





Separating intro greetings from menu prompts allows you to change greetings for holidays or night-time hours, for example, without re-recording the entire message.

To record an intro greeting:


1. From Auto Attendants page, click the  icon next to **Intro Greetings**. A Manage Greetings pop-up window similar to the following appears.

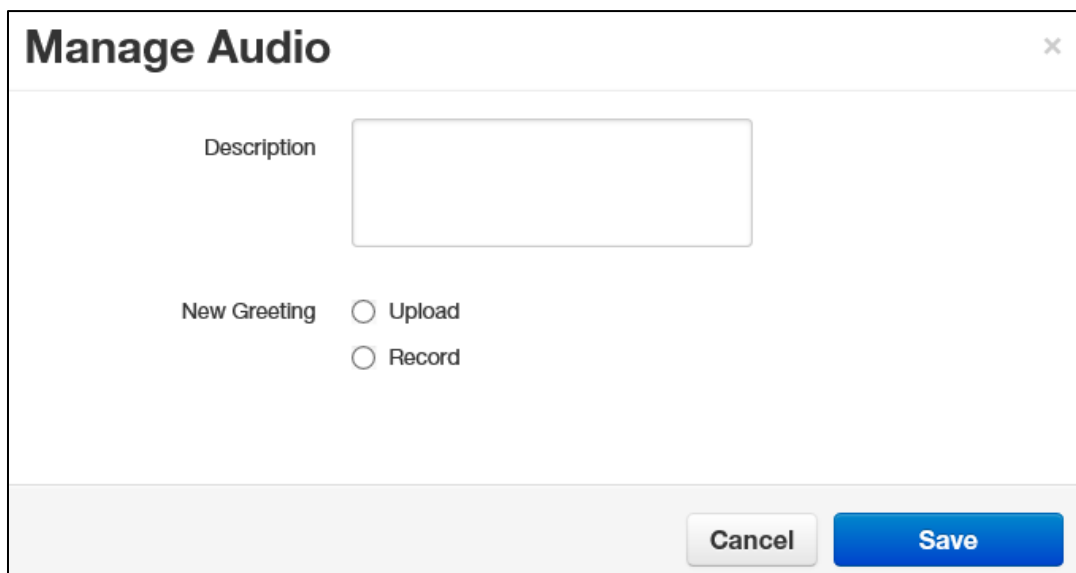


2. From this pop-up window:

- To play a greeting, click the  icon.
- To upload a new greeting, hover over it, and then click the  icon on the right side of the row. For **New Greeting**, click **Upload**. Click the **Browse** button, navigate to the MP3 or WAV file you want to use for your greeting, click the file, and click **Open**. Click **Upload**.
- To record a new greeting, hover over it, and then click  icon on the right side of the row. For **New Greeting**, click **Record**. In the **Call me at field**, enter the number to call (either an extension or a telephone number such as your cell phone) and click **Call**. Your phone will be called. At the prompt, record the new greeting, and then press # when you finish your recording.
- To delete a recording, hover over it, and then click the  icon at the far right of the row. At confirmation prompt, click **Yes** to delete the recording or **No** to retain it.
- When you finish, click **Add Greeting** followed by **Done**.

To record a menu prompt:

1. From Auto Attendants page, under **Menu Prompt**, click either the field **Click to add a new menu prompt** or click the  icon next to the field. Either step displays a Manage Audio pop-up window similar to the following.



Manage Audio ×

Description

New Greeting Upload
 Record

2. Complete the fields (see Table 6-3).

Table 6-3. Manage Audio Settings

Setting	Description
Description	Enter a name for this greeting. The name should allow you to differentiate this greeting from other greetings you recorded.
New Greeting	<p>Select whether to upload or record a greeting. Greetings must be in MP3 or WAV format. Choices are:</p> <ul style="list-style-type: none"> • Upload = use this option to upload a file for use as your greeting. Click the Browse button. Navigate to the file, click the file, and click Open. Click Upload. • Record = if you select this option, enter the number to call (either an extension or a telephone number such as your cell phone) and click Call. Your phone will be called. At the prompt, record the new greeting, and then press # when you finish your recording.

- Click **Save** in the Manage Audio pop-up window.


Editing Auto Attendants

There might be times when you need to edit auto attendants.













1. From the Auto Attendants page, either:

- Click a name

OR

- Hover over a name, and then click the  icon at the far right of the Auto Attendants page. For example:

Click a name or... ...click this icon

Name	Extension	
Jones	111	 
Zeus	111	 
Test	1234	 
Main Autoattendant	500	 
foo	555	 
foo2	556	 

Add Attendant


Either step displays a pop-up window similar to the following.

The screenshot shows a configuration interface for an Automated Attendant. At the top, there are three input fields: "Auto Attendant Name" with the value "Main Autoattendant", "Extension" with the value "500", and "Intro Greetings" with a speaker icon. Below these is a horizontal bar with "Menu Prompt" on the left and "Dial Pad Menu" on the right. Under "Menu Prompt" is a text box containing "Click to add a new menu prompt" and a speaker icon. Under "Dial Pad Menu" is a standard telephone dial pad with numbers 1-9, 0, and *, each with its corresponding letters above it. Below the dial pad are three plus signs and a small icon. To the right of the dial pad is an "Options" button. At the bottom of the interface are two buttons: "Save" (blue) and "Cancel" (grey).







- Complete the fields (see Table 6-2 on page 52).
- Click **Save**.

Deleting Auto Attendants

If you no longer need an auto attendant, you can delete it from the system.

1. From the Auto Attendants page, hover over the auto attendant, and then click the  icon at the far right of the row. A confirmation prompt appears.
2. Click **Yes** to delete the auto attendant or **No** to retain it.

Click this icon

Name	Extension	
Jones	111	
Zeus	111	
Test	1234	
Main Autoattendant	500	
foo	555	
foo2	556	

Add Attendant

Auto Attendant Best Practices

When configuring your auto attendant, observe the following best practices:

- ❑ Consider your callers. Do they know with whom they want to talk or what function they need (customer service, sales, and so on)? Taking your callers into account will help you determine how to configure your auto attendant.
- ❑ If callers know with whom they want to talk, assist them by providing options such as:
 - “Dial your party’s extension at any time.”
 - “Press x for a dial by name directory.”
 - “Press x for the first available person/general voicemail.”
 - “Press 1 for Bob, 2 for Susan,” and so on. However, this approach does not scale well.
- ❑ If callers do not know a specific person but need a function, provide options such as:
 - “Press x for a dial by name directory.”
 - “For sales, press 1.”
 - “For customer service, press 2.”

- “*For accounting, press 3.*”

Keep greetings brief. Do not flood callers with too much information (hours, directions, fax numbers). Instead, place that information into a “play message” option.



7. WORKING WITH CALL QUEUES

Topics:


- ^ *Displaying the Call Queues*
Page (page 61)
- ^ *Adding Call Queues* (page 62)
- ^ *Editing Call Queues* (page 66)
- ^ *Deleting Call Queues* (page 68)
- ^ *Adding Music On Hold Files*
(page 68)
- ^ *Working with Agents* (page 69)

Call queues are a “waiting line” commonly used for support and sales groups. Callers receive music on hold while waiting for the next available agent.

Displaying the Call Queues Page

All call queue tasks are performed from the Call Queues page. To display this page, click the **Call Queues** icon on the menu bar:



The following figure shows an example of the Call Queues page. The  button at the top-right side of the page refreshes the information on the page.

Name	Extension	Type	Callers in Queue	Agents (Available)
Ring All Phones	701	Ring All	0	0 (0)
Park	702	Call Park	0	-
Round Robin Queue	800	Round-robin	0	1 (0)

Where to go from here:

From the Call Queues page, you can:

- Add call queues. See “Adding Call Queues” on page 62.
- Edit call queues. See “Editing Call Queues” on page 66.
- Delete call queues. See “Deleting Call Queues” on page 68.
- Edit Music on Hold settings. See “Adding Music on Hold” on page 68.
- Work with agents associated with call queues. See “Working with Agents” on page 69.

Adding Call Queues

To add call queues:

1. From the Call Queues page, click the **Add Call Queue** button. The Add a Call Queue pop-up window appears, with the **Basic** tab displayed.

Add a Call Queue ×

Basic

Name

Extension

Note: Extension cannot be changed

Type Round-robin (longest idle) ⓘ
 Ring All ⓘ
 Linear Hunt ⓘ
 Linear Cascade ⓘ
 Call Park ⓘ

Cancel

- Complete the fields (see Table 7-1).

Table 7-1. Adding/Editing Basic Call Queue Settings

Setting	Description
Name	Enter a name for this call queue. The name should allow you to differentiate this call queue from other call queues you configured.
Extension	Adding a call queue: Select an extension. Editing a call queue: read-only field that shows the extension.
Type	Determines how calls are distributed. Choices are: <ul style="list-style-type: none"> • Round robin = routes callers to the agent that has been idle for the longest period of time. Then complete the remaining fields in the window. • Ring All = routes callers to all available agents at the same time. Then complete the remaining fields in the window. • Linear Hunt = routes callers to the available agents in a predefined order. The order is defined when editing the queue's agents (see "Working with Agents" on page 69). Then complete the remaining fields in the window. • Linear Cascade = routes callers to groups of available agents in a predefined order. The order is defined when editing the queue's agents (see "Working with Agents" on page 69). Then complete the remaining fields in the window. • Call Park = places callers on hold until the agent retrieves them. Go to step 4.
Phone Number	Select the phone number
Record Calls	Select whether calls will be recorded (Yes) or not recorded (No) for this call queue.
Statistics	Select whether statistics will be recorded (Yes) or not recorded (No) for this call queue.
Message to Agent	Enter the message that will be sent to the agent (for example, " <i>Here's a call from the emergency support queue.</i> ") You configure this setting after adding the call queue.

- For **Type**, if you clicked **Park**, click **Save** to complete this procedure. Otherwise, click **Next** to display the **Pre-Queue Options** tab and proceed to the next step.

Add a Call Queue Round-robin

Basic
Pre Queue Options
In Queue Options

Options for before the caller is put in queue.

Require agents i

Require Intro MOH i

Max Expected Wait (sec) i

Unlimited
500
1000

Max Queue Length i

Unlimited
50
99

Allow Callback option i

Forward if unavailable i

Note: uses the default Time Frame.

- Complete the fields (see Table 7-2).

Table 7-2. Adding/Editing Pre-Queue Option Settings

Setting	Description
Require agents	Select whether to require (Yes) or not require (No) agents for this call queue.
Require Intro into MOH	This setting forces playback of the complete intro MOH before dispatch. This is useful for compliance greetings such as "Calls may be recorded," and so on. Select whether to require (Yes) or not require (No) the complete playback of the Intro Music on Hold for this call queue.
Max Expected Wait	Use the slider to specify the maximum expected wait time, in seconds. If the estimated wait time exceeds this time, the call cannot queue.
Max Queue Length	Use the slider to specify the maximum number of people that the system will allow to wait in this call queue.

Setting	Description
Allow Callback option	This setting allows callers to record their number, hang up, keep their spot in line, then get called when an agent is available. Select whether the callback option is available (Yes) or not available (No) to users in this call queue.
Forward if unavailable	This setting specifies where to forward if prequeue options will not allow queueing (for example, expected wait is too high). Enter where the call forwards if queueing is not available.

- Click **Next**. The **In Queue Options** tab appears.

Add a Call Queue Round-robin ✕

Basic **Pre Queue Options** **In Queue Options**

Options for while callers are queued and being routed to agents.

Queue Ring Timeout (sec) ⓘ 5 Unlimited

Agent Ring Timeout (sec) ⓘ 5 90

Logout agent on missed call ⓘ ▼

Forward if unanswered ⓘ
Note: uses the default Time Frame.

Voicemail ⓘ ▼

- Complete the fields (see Table 7-3).

Table 7-3. Adding/Editing In-Queue Option Settings

Setting	Description
Queue Ring Timeout	Use the slider to specify the maximum number of seconds that the call remains in the queue before timing-out. If Forward if Unanswered is enabled, the call is handled according to the Forward if Unanswered setting. If Voicemail is enabled and Forward if Unanswered is disabled, the system prompts the caller to stay in the queue or go to voicemail.
Agent Ring Timeout	Use the slider to specify the maximum number of seconds that the queue will ring an agent before moving on to the next agent. This value should be less than the Queue Ring Timeout value.
Logout agent on missed call	Select whether an agent logs callers out of the queue (Yes) or does not log out callers if an agent misses a call.
Forward if Unanswered	Enter the extension, phone, or number where callers are forwarded if agents fail to answer before the Queue Ring Timeout occurs
Voicemail	Select whether callers will be (Yes) or will not be (No) given the option to leave a voicemail if agents fail to answer when the Queue Ring Timeout occurs and Forward if unanswered is not set.

- Click **Add**.

Editing Call Queues

There might be times when you need to edit Call Queues. For example, you might want to change basic, pre-queue, or in-queue options.

1. From the Call Queues page, either:



- Click a name

OR

- Hover over a name, and then click the  icon at the far right of the Call Queues page. For example:

Click a name or...

...click this icon

Name	Extension ^	Type	Callers in Queue	Agents (Available)	
park	701	Call Park	0	-	 
park	702	Call Park	0	-	 
test	800	Linear Cascade	0	0 (0)	 

Either step displays the Edit pop-up window. For example:

The screenshot shows a configuration window titled "Edit park" with a sub-tab "Round-robin". The window has three tabs: "Basic", "Pre Queue Options", and "In Queue Options". The "Basic" tab is active. The configuration includes:


- Name:** A text input field containing "Call Round Robin".
- Extension:** A text input field containing "701". Below it, a note states: "Note: Extension cannot be changed".
- Type:** A radio button selection with options: "Round-robin (longest idle)", "Ring All", "Linear Hunt", "Linear Cascade", and "Call Park". "Round-robin (longest idle)" is selected.
- Direct Phone Number(s):** A dropdown menu showing "No Phone Numbers available".
- Record Calls:** A dropdown menu showing "No".
- Statistics:** A dropdown menu showing "No".
- Message to Agent:** A red circular indicator.


At the bottom right, there are "Cancel" and "Save" buttons.










- Perform the procedure starting with step 2 under “Adding Call Queues” on page 62.

Deleting Call Queues

If you no longer need a call queue, you can delete it from the system.


1. From the Call Queues page, hover over the call queue, and then click the  icon at the far right of the row. A confirmation prompt appears.
2. Click **Yes** to delete the call queue or **No** to retain it.


Click this icon 










Name	Extension ▲	Type	Callers in Queue	Agents (Available)	
park	701	Call Park	0	-	  
park	702	Call Park	0	-	  
test	800	Linear Cascade	0	0 (0)	  

Adding Music on Hold to a Queue

The Call Queues page allows you to add Music on Hold for call queues.


1. From the Call Queues page, hover over the call queue, and then click the  icon at the far right of the row. The Music On Hold page appears.
2. Proceed to “Adding Music On Hold Files” on page 87.

Click this icon 













Name	Extension ▲	Type	Callers in Queue	Agents (Available)	
park	701	Call Park	0	-	  
park	702	Call Park	0	-	  
test	800	Linear Cascade	0	0 (0)	  

Working with Agents

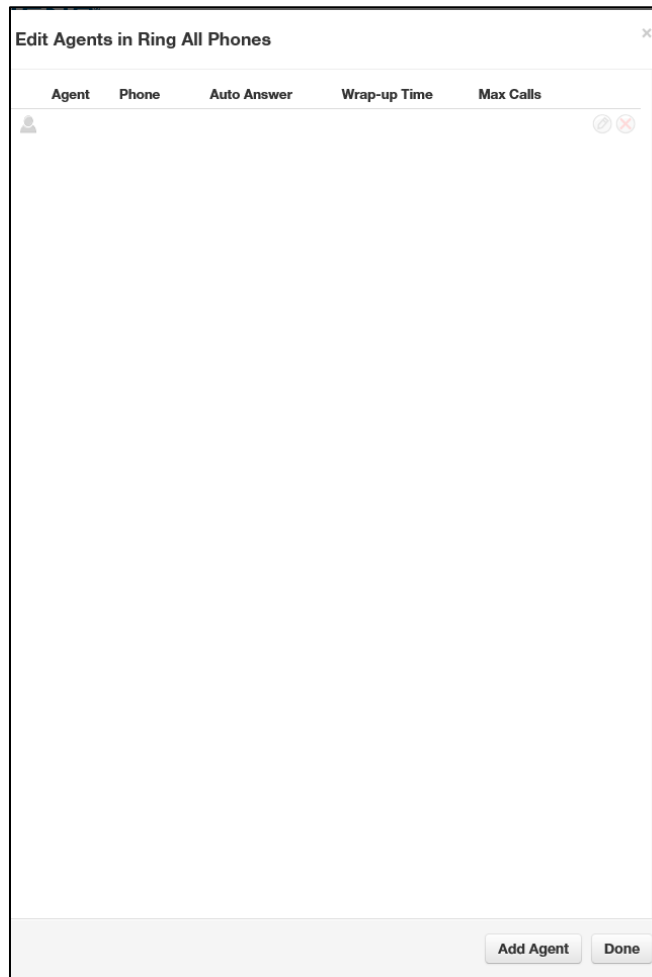
The Call Queues page allows you to add, edit, and delete agents for call queues.

1. From the Call Queues page, hover over the call queue, and then click the  icon at the far right of the row.

Click this icon

Name	Extension ▲	Type	Callers in Queue	Agents (Available)	
Test	120	Call Park	0	-	  
park	701	Call Park	0	-	  
park	702	Call Park	0	-	  
test	800	Linear Cascade	0	0 (0)	  

An Edit Agents pop-up window similar to the following appears.



- To add an agent:
 - a. Click the **Add Agent** button. The following settings appear.

Edit Agents in Ring All Phones ✕

Agent Phone

Status ▼

Note: Changing Status may take a moment to update

Wrap up time (sec) 0 300 595


Max Simultaneous Calls 1 6

Queue priority for agent ▼

Request Confirmation

Auto Answer

Save

Agent	Phone	Auto Answer	Wrap-up Time	Max Calls
		<input type="checkbox"/>		

Add Agent **Done**

- a. Complete the fields (see Table 7-4).

- b. Click **Save**. The color-coded status of the new agent is displayed:
- Green = available
 - Gray = offline
 - Red = on a call

Table 7-4. Adding/Editing Agent Settings

Setting	Description
Agent Phone	Select a phone of an agent to add to the queue.
Status	Select whether the agent is ready to take calls (Online) or not active (Offline).
Wrap up time	Use the slider to specify the amount of time the agent is allocated to complete paperwork after finishing a call and before a new call is dispatched.
Max Simultaneous calls	Use the slider to specify the maximum number of calls an agent can take at one time. This will almost always be 1.
Order in Linear Hunt	Sets the dispatch order. If a call is dispatching, it will go to the available agent with the lowest order.
Queue priority for agent	Sets weighting for an agent that is servicing multiple queues. If you have an agent servicing two queues and both queues have a person waiting, for example, the agent will get the call from the queue whose priority is highest (lowest number).
Request Confirmation	Enables or disables request confirmation. Choices are: <ul style="list-style-type: none"> • Checked = requires the agent to confirm receiving the call. • Not checked = agent does not confirm the call.
Auto Answer	Enables or disables auto answer. Choices are: <ul style="list-style-type: none"> • Checked = agent phone answers automatically (not all phones support this feature). • Not checked = agent phone not answer automatically.

c. Click **Done**.

2. To edit agent settings:

- a. Hover over an agent, and then click the  icon at the far right of the window. Settings similar to the following appear.

Edit Agents in Ring All Phones ✕

Agent Phone

Status

Note: Changing Status may take a moment to update

Wrap up time (sec) 0 300 595

Max Simultaneous Calls 1 6

Queue priority for agent ▼

Request Confirmation


Auto Answer

Save

Agent	Phone	Auto Answer	Wrap-up Time	Max Calls	

Add Agent **Done**

b. Complete the fields (see Table 7-4 on page 71).

- c. Click **Save**. The color-coded status of the new agent is displayed:
 - Green = available
 - Gray = offline
 - Red = on a call
- To delete an agent:
 - a. Hover over an agent, and then click the  icon at the far right of the window.
 - b. When a confirmation prompt appears, click **Yes** to delete the agent or **No** to retain it.
- When you finish working within the pop-up window, click **Done**.



8. WORKING WITH TIME FRAMES

Topics:

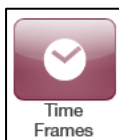
- ^ *Displaying the Time Frames Page (see page 75)*
- ^ *Working with Time Frames (page 77)*
- ^ *Adding Time Frames (page 80)*
- ^ *Editing Time Frames (see page 82)*
- ^ *Deleting Time Frames (see page 83)*
- ^ *Viewing Begin and End Dates (see page 83)*

Using time frames, you can tell the system about the times when your office is open, closed, or celebrating a holiday.

Time frames do not go into effect until you apply a time frame to an answering rule or auto attendant greeting. When the time frames are applied, the first matching time frame becomes active.

Displaying the Time Frames Page

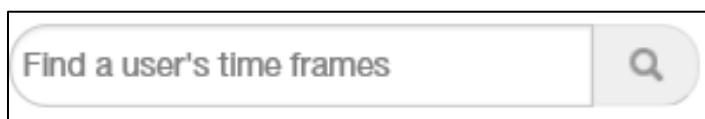
All time frame tasks are performed from the Time Frames page. To display this page, click the **Time Frames** icon on the menu bar:



The following figure shows an example of the Time Frames page.

Name	Description	Owner
Holidays	Specific Dates	kevin.netsapiens.com
MF95	Days and Times	kevin.netsapiens.com

A search field at the top-left of the page allows you to review a specific user's personal time frames by entering a user time frame, and then clicking the magnifying glass icon:



The  button at the top-right side of the page refreshes the information on the page.

Where to go from here:

From the Time Frames page, you can:

- Add time frame. See “Adding Time Frames” on page 80.
- Edit time frames. See “Editing Time Frames” on page 82.
- Delete time frames. See “Deleting Time Frames” on page 83.
- See begin and end dates for a time frame. See “Viewing Begin and End Dates” on page 83.

Working with Time Frames


When you create a new time frame, you assign a unique name to it and then specify one of the following times associated with the time frame:

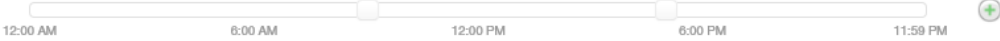
- **Always** = time frame applies to all hours of every day (24/7/365).
- **Days of the week and times** = commonly used to define office open hours such as Monday-Friday 9am – 5pm. Each day has its own check box. Check the days to which the time frame will be applied, and then use slide bars to define the time ranges for each checked day.
- **Specific dates or range** = commonly used to define holidays or other special events such as New Year's or a training closure. Use pop-up calendars to select the To and From dates when the time range will apply.

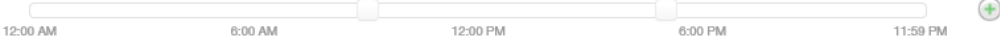
Add a Timeframe ×


Name **Note:** Name cannot be changed


When Always Days of the week and times Specific dates or ranges


Sunday 


Monday 

Tuesday 

Wednesday 

Thursday 

Friday 

Saturday 

When you check a check box, a blue control bar covers the times 9AM to 5PM for that day. Drag this control to change the time according to your requirements. If you need to add more ranges for a day, click the following icon to the right of the time range:



Add a Timeframe

Name **Note:** Name cannot be changed

When Always Days of the week and times Specific dates or ranges

Sunday Monday Tuesday Wednesday Thursday Friday Saturday

12:00 AM 6:00 AM 12:00 PM 6:00 PM 11:59 PM

12:00 AM 6:00 AM 12:00 PM 6:00 PM 11:59 PM

12:00 AM 6:00 AM 12:00 PM 6:00 PM 11:59 PM

12:00 AM 6:00 AM 12:00 PM 6:00 PM 11:59 PM

12:00 AM 6:00 AM 12:00 PM 6:00 PM 11:59 PM

12:00 AM 6:00 AM 12:00 PM 6:00 PM 11:59 PM

12:00 AM 6:00 AM 12:00 PM 6:00 PM 11:59 PM

Cancel Save

- **Specific dates or ranges** = allows you to specify a time range for the time frame by selecting starting and ending dates from a pop-up calendar.

Add a Timeframe

Name: **Note:** Name cannot be changed

When: Always Days of the week and times Specific dates or ranges

Specific dates or ranges: to +

July 2015

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Cancel Save

The following example shows a time frame called **Open Hours**, which covers 9AM to 5PM hours for the days Monday through Friday.

Edit Open Hours

Name: Open Hours **Note:** Name cannot be changed

When: Always Days of the week and times Specific dates or ranges

Sunday 12:00 AM 6:00 AM 12:00 PM 6:00 PM 11:59 PM +

Monday 12:00 AM 6:00 AM 12:00 PM 6:00 PM 11:59 PM +

Tuesday 12:00 AM 6:00 AM 12:00 PM 6:00 PM 11:59 PM +

Wednesday 12:00 AM 6:00 AM 12:00 PM 6:00 PM 11:59 PM +

Thursday 12:00 AM 6:00 AM 12:00 PM 6:00 PM 11:59 PM +

Friday 12:00 AM 6:00 AM 12:00 PM 6:00 PM 11:59 PM +

Saturday 12:00 AM 6:00 AM 12:00 PM 6:00 PM 11:59 PM +

Cancel Save

This time frame might be used with another time frame called **Holiday**, which covers holiday periods. You might even create a time frame called **Closed Hours (default already exists)**, which would be an “Always” rule, but would not always be active since it can be set for lower priority than **Holiday** or **Open Hours**.

Adding Time Frames

To add time frames:

1. From the Time Frames page, click the **Add Time Frame** button. The Add a Timeframe pop-up window appears.

- Complete the fields (see Table 8-1).

Table 8-1. Adding/Editing Time Frame Settings

Setting	Description
Name	Adding a time frame: Enter a name for this time frame. The name should allow you to differentiate this time frame from other time frames you configured. Editing a time frame: read-only field that shows the name of the time frame.
When	Select when the time frame will be applied. Choices are: <ul style="list-style-type: none"> • Always = time frame is applied to all days and times. • Days of the week and times = use the controls in Figure 8-1 to check the days when the time frame applies, and then use the slider controls to select the hours for that date when the time frame applies. • Specific dates or ranges = use the controls in Figure 8-2 to select the dates or range to which the time frame applies.

The screenshot shows a dialog box titled "Add a Timeframe" with a close button (X) in the top right corner. Below the title bar, there is a "Name" input field followed by a "Note: Name cannot be changed". Underneath, the "When" section has three radio button options: "Always", "Days of the week and times" (which is selected), and "Specific dates or ranges". The main area of the dialog contains seven rows, one for each day of the week (Sunday through Saturday). Each row starts with an unchecked checkbox for the day name. To the right of the checkbox is a horizontal timeline slider with tick marks at 12:00 AM, 6:00 AM, 12:00 PM, 6:00 PM, and 11:59 PM. A white slider knob is positioned at the 12:00 PM mark on each timeline. To the right of each timeline is a green plus sign icon. At the bottom right of the dialog are "Cancel" and "Save" buttons.

Figure 8-1. Configuring Days of the Week

The screenshot shows the same "Add a Timeframe" dialog box, but with the "Specific dates or ranges" radio button selected. The "When" section now shows "Always", "Days of the week and times", and "Specific dates or ranges" (selected). Below this, there is a "Specific dates or ranges" label followed by two empty input boxes separated by the word "to", and a green plus sign icon to the right. The "Cancel" and "Save" buttons remain at the bottom right.

Figure 8-2. Configuring Specific Dates or Ranges

- Click **Save**.


Editing Time Frames

There might be times when you need to edit time frames. For example, you might want to change when they occur.

1. From the Time Frames page, either:

- Click a name

OR

- Hover over a name, and then click the  icon at the far right of the Time Frames page. For example:

Click a name or...

...click this icon


Name	Description	Owner	
Holidays	Specific Dates	kevin.netsapiens.com	 
MF95	Days and Times	kevin.netsapiens.com	 

Either step displays the Edit pop-up window. For example:

Edit Holidays ×

Name **Note:** Name cannot be changed


When Always Days of the week and times Specific dates or ranges

Specific dates or ranges to 



- Complete the fields (see Table 8-1 on page 80).
- Click **Save**.

Deleting Time Frames

If you no longer need a time frame, you can delete it from the system.

1. From the Time Frames page, hover over the time frame, and then click the  icon at the far right of the row. A confirmation prompt appears.
2. Click **Yes** to delete the time frame or **No** to retain it.

Click this icon 


Name	Description	Owner	
Holidays	Specific Dates	kevin.netsapiens.com	 
MF95	Days and Times	kevin.netsapiens.com	 

Viewing Begin and End Dates

To view the begin and end dates for a time frame:

1. From the Time Frames page, hover over the description. A pop-up window similar to the following shows the begin and end dates for the time frame.

Hover over a description... ...to see the begin and end dates



The screenshot shows the 'Time Frames / kevin.netsapiens.com' interface. A search bar is at the top left, and an 'Add Time Frame' button is at the top right. Below is a table with columns for Name, Description, and Owner. The 'Holidays' row is highlighted, and a pop-up window is displayed over its description 'Specific Dates'. The pop-up window has columns for 'Begin' and 'End', both showing the date '12/25/2014'. Red arrows point from the text labels above to the 'Specific Dates' description and the 'Begin' and 'End' fields in the pop-up.

Name	Description	Begin	End	Owner
Holidays	Specific Dates	12/25/2014	12/25/2014	kevin.netsapiens.com
MF95	Days and Times			kevin.netsapiens.com



9. WORKING WITH MUSIC ON HOLD

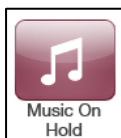
Topics:

- ^ *Displaying the Music On Hold Page (page 85)*
- ^ *Adding Music On Hold (page 87)*
- ^ *Changing the Order of Music On Hold Files (page 88)*
- ^ *Editing Music On Hold Files (page 89)*
- ^ *Deleting Music On Hold Files (page 90)*
- ^ *Adjusting Music On Hold Settings (page 90)*

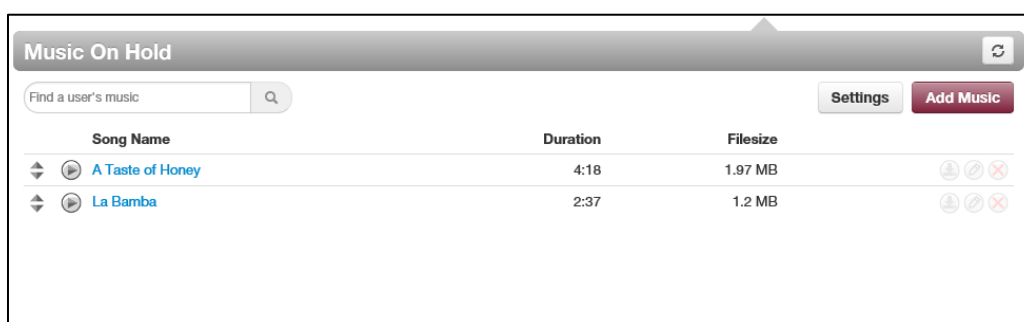
The system has a Music on Hold feature that plays when callers are on hold or waiting in queue. You can precede the first file with an optional introductory greeting.

Displaying the Music On Hold Page

All Music On Hold tasks are performed from the Music On Hold page. To display this page, click the **Music On Hold** icon on the menu bar:



The following figure shows an example of the Music On Hold page.



A search field at the top-left of the page allows you to view the MOH files for a specific user by entering a file name, and then clicking the magnifying glass icon:



The  button at the top-right side of the page refreshes the information on the page.

Where to go from here:

From the Music On Hold page, you can:

- Add files. See “Adding Music On Hold” on page 87.
- Change the order of files. See “Changing the Order of Music On Hold Files” on page 88.
- Edit files. See “Editing Music On Hold Files” on page 89.
- Delete files. See “Deleting Music On Hold Files” on page 90.
- Adjust Music On Hold settings. See “Adjusting Music On Hold Settings” on page 90.

Adding Music On Hold Files


The following procedure describes how to add files. Only properly licensed music files can be used with the Music On Hold feature.

1. From the Music On Hold page, click the **Add Music** button. The Add Music pop-up window appears.

- Complete the fields (see Table 9-1).

Table 9-1. Adding/Editing Music On Hold

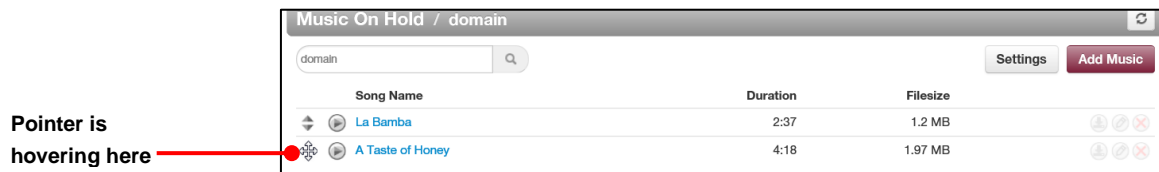
Setting	Description
Browse	Adding a Music On Hold file: Use this button to upload a file in MP3 or WAV format. Click the Browse button. Navigate to the music file, click the file, and click Open. Editing a Music On Hold file: this field does not appear.
Song Name	Enter a name for this file.

- Click **Upload**.
- After the file is uploaded, you can play it on your computer by clicking the  icon to the left of the file on the Music On Hold page.

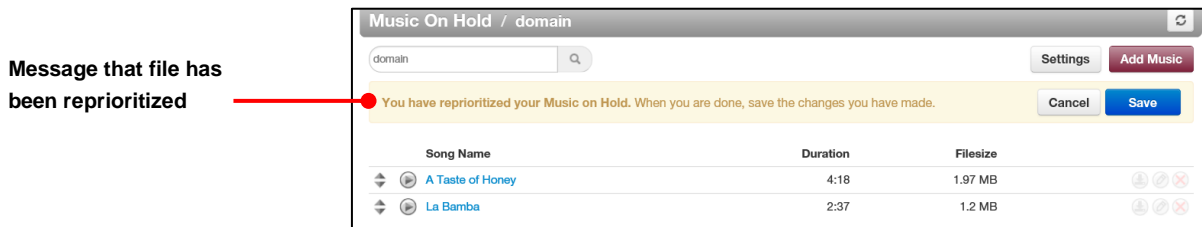
Changing the Order of Music On Hold Files

Music On Hold files play according to the order in which they appear in the Music On Hold page, starting with the top file on the page, if the randomization setting is not selected. To change the order in which files are played:

1. On the left side of the Music On Hold page, hover the mouse over the up/down arrows for the file you want to move (the pointer changes to a 4-headed arrow).



2. Hold down your mouse button, drag the file to the desired location, and then release the mouse button. A message tells you that the file has been reprioritized and prompts you to click **Save**.



- Click **Save**.

Editing Music On Hold Files

There might be times when you need to edit the name of a Music On Hold file.





1. From the Music On Hold page, either:

- Click a file name

OR

- Hover over a file name, and then click the  icon at the far right of the Music On Hold page. For example:

Click a file name or... ...click this icon

Song Name	Duration	Filesize	
 La Bamba	2:37	1.2 MB	  

Either step displays the Edit Music pop-up window. For example:


Edit Music ✕






Song Name


- Complete the field (see Table 9-1 on page 87).
- Click **Save**.

Deleting Music On Hold Files

If you no longer need a Music On Hold file, you can delete it from the system.

1. From the Music On Hold page, hover over the file name, and then click the  icon at the far right of the row. A confirmation prompt appears.
2. Click **Yes** to delete the file or **No** to retain it.

Song Name	Duration	Filesize	
  La Bamba	2:37	1.2 MB	  

Click this icon 

Adjusting Music On Hold Settings

To adjust Music On Hold settings:

1. From the Music On Hold page, click the **Settings** button. A Music on Hold Settings pop-up window similar to the following shows the begin and end dates for the time frame.

Music on Hold Settings ×

Enable Music on Hold

Randomize Music on Hold

Play introductory greeting

Cancel Save

- Complete the fields (see Table 9-2).

Table 9-2. Music On Hold Settings

Setting	Description
Enable Music on Hold	Enable (check) or disable (uncheck) the Music On Hold feature.
Randomize Music on Hold	Play Music On Hold files in a random order (check) or according to their order on the Music On Hold page (uncheck).
Play introductory greeting	<p>Play (check) or do not play (uncheck) an introductory greeting before playing the first Music On Hold file. If you check this check box, the New Greeting and Greeting Name fields appear for uploading or recording a greeting. Greetings must be in MP3 or WAV format:</p> <p>To upload a greeting file:</p> <ol style="list-style-type: none"> 1. Next to New Greeting, click Upload. 2. Use the Browse button to select the file. 3. In the Greeting Name field, enter a name for the greeting. 4. Click Save. <p>To record a greeting:</p> <ol style="list-style-type: none"> 1. Next to New Greeting, click Record. 2. In the Call me at field, enter the number to call (either an extension or a telephone number such as your cell phone). 3. In the Greeting Name field, enter a name for the greeting. 4. Click Call. Your phone will be called. At the prompt, record the new greeting, and then press # when you finish your recording.

- Click **Save**.



10. WORKING WITH INVENTORY

Topics:

- ^ *Displaying the Inventory Page*
(see page 93)
- ^ *Managing Phone Numbers* (see
page 94)
- ^ *Managing Phone Hardware*
(see page 97)

The Inventory page allows you to manage your phone numbers and phone hardware.

Displaying the Inventory Page

All inventory tasks are performed from the Inventory page. To display this page, click the **Inventory** icon on the menu bar:



The following figure shows an example of the Inventory page. The page has two tabs:

- **Phone Numbers** allows you to filter, edit, and export phone numbers.
- **Phone Hardware** allows you to filter, add, edit, and export information about phone hardware.



The  button at the top-right side of the page refreshes the information on the page.

Phone Number ^	Treatment	Destination	Notes
1 (210) 555-1234	User	500 (Main Autoattents)	Mike's DID
1 (760) 888-6227	User	201	To Susan

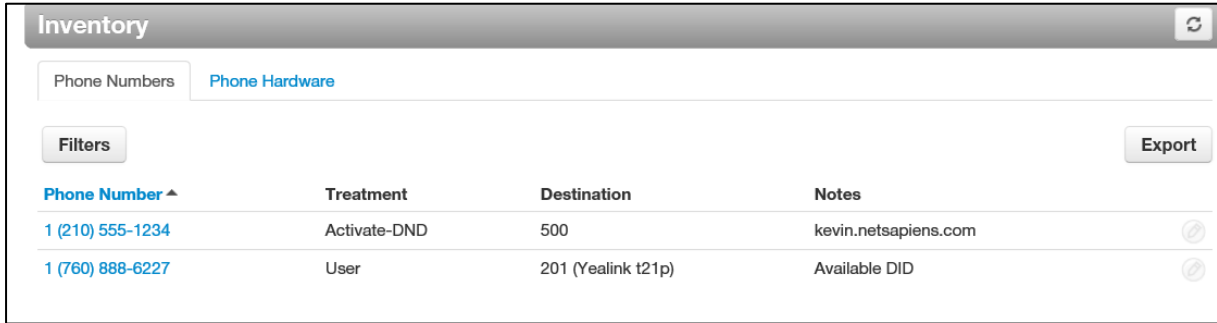
Where to go from here:

From the Inventory, you can:

- Manage phone numbers. See “Managing Phone Numbers” on page 94.
- Manage phone hardware. See “Managing Phone Hardware” on page 97.

Managing Phone Numbers

The **Phone Numbers** tab allows you to filter, edit, and export phone numbers.

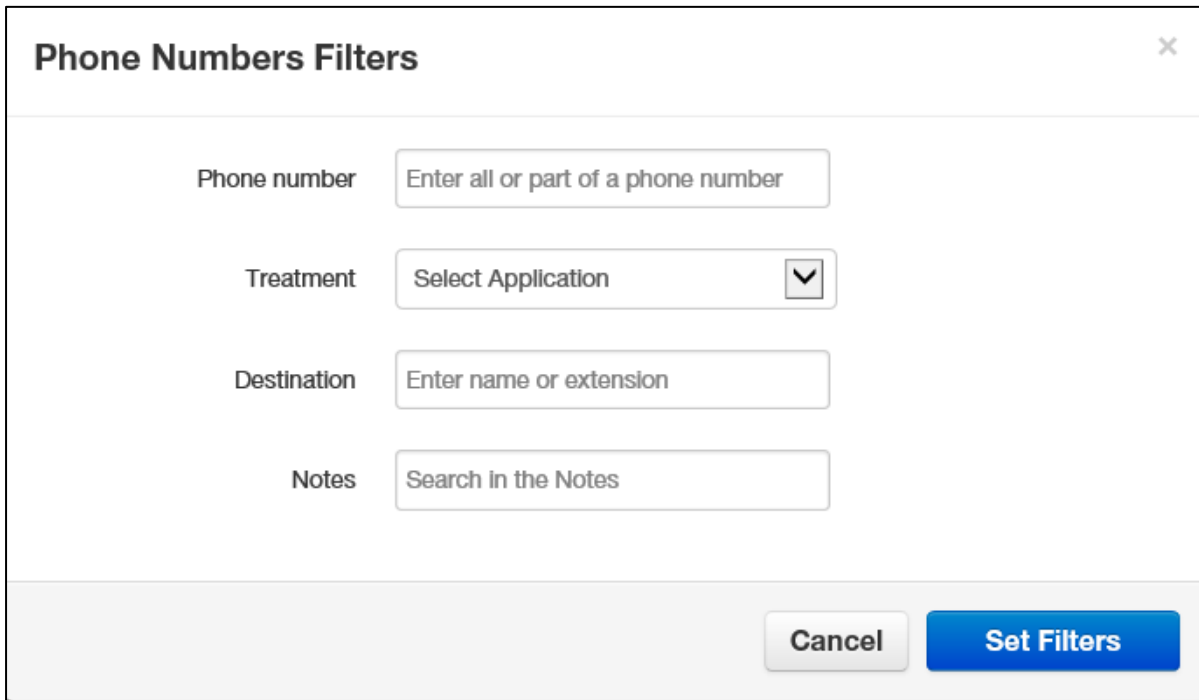


Phone Number ^	Treatment	Destination	Notes
1 (210) 555-1234	Activate-DND	500	kevin.netsapiens.com
1 (760) 888-6227	User	201 (Yealink t21p)	Available DID

Filtering Phone Numbers

Using the **Filter** button, you can filter phone numbers and view only the numbers of interest to you.

1. From the **Phone Numbers** tab, click the **Filters** button. The Phone Number Filters pop-up window appears.



Phone Numbers Filters

Phone number

Treatment ▼

Destination

Notes

2. Complete the fields (see Table 10-1).

- Click **Set Filters**. The **Phone Numbers** tab shows only the phone numbers that match your criteria. If no phone numbers match your criteria, a message informs you that there are no matches to your filter.

Table 10-1. Phone Number Filter Settings

Setting	Description
Phone number	Enter all or part of the phone numbers you want to view.
Treatment	Select a treatment for the phone numbers you want to view. Choices are: <ul style="list-style-type: none"> • Available Number = an unassigned telephone number. • User = routes to a user specified. • Conference = routes to a conference bridge specified. • Call Queue = routes to a specified call queue. • Voicemail = routes to the specified user's voicemail box. • SIP Trunk = routes to a specified <u>SIP trunk</u>. • Auto Attendant = routes to a specified auto attendant.
Destination	Enter the name or extension of the phone destination.
Notes	Enter optional notes about this phone number.


Editing Phone Numbers

To edit phone numbers:

- From the **Phone Numbers** tab, either:



- Click a phone number

OR

- Hover over a phone number, and then click the  icon at the far right of the **Phone Numbers** tab. For example:

Click a phone number or...

...click this icon

Phone Number ^	Treatment	Destination	Notes
1 (210) 555-1234	User	500 (Main Autoattents)	Mike's DID 
1 (760) 888-6227	User	201	To Susan 

Either step displays the Edit pop-up window. For example:

Edit 1 (210) 555-1234 ✕

Treatment

User
▼

User

Enter name or extension

Enable enhanced voicemail

Caller ID Prefix

Notes

User often works remotely

Limited to 64 characters

Cancel
Save

- Complete the field (see Table 9-1 on page 87).
- Click **Save**.

Setting	Description
Treatment	Select a treatment for the phone numbers you want to view. Choices are: <ul style="list-style-type: none"> Available number = an unassigned telephone number. User = routes to a specified user. Fax = routes to a fax number. Conference = routes to a conference bridge specified. Call queue = routes to a specified call queue. Voicemail = routes to the specified user's voicemail box. Auto attendant = routes to a specified auto attendant.
Notes	Enter optional notes about this phone number.
Caller ID Prefix	Enter a prefix to the caller ID for this phone number. Range: up to 64 alphanumeric characters.

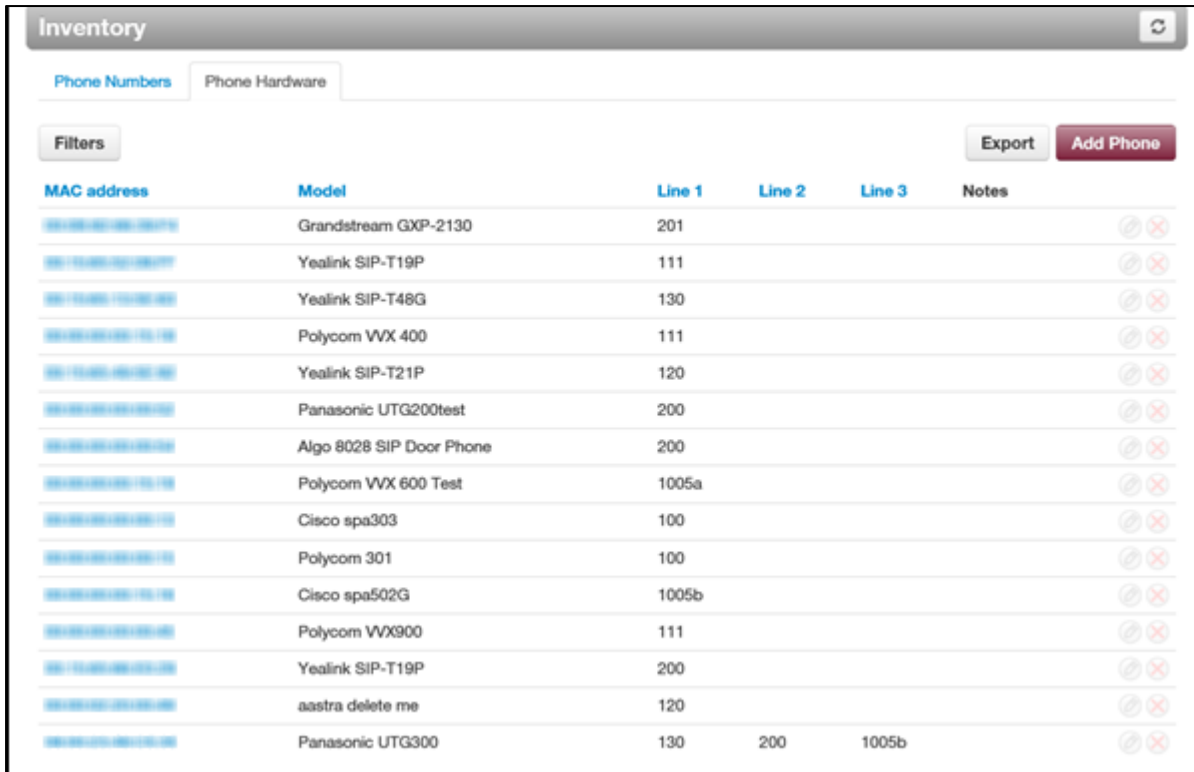
Exporting Phone Numbers

You can export phone numbers in CSV format, and then open the phone numbers in Microsoft Excel for further manipulation.

1. From the **Phone Numbers** tab, click the **Export** button.
2. When prompted, click **Save**.

Managing Phone Hardware

The **Phone Hardware** tab allows you to filter, add, edit, and export information about the phone hardware in your system.



MAC address	Model	Line 1	Line 2	Line 3	Notes
0001200100010001	Grandstream GXP-2130	201			
0001200100010002	Yealink SIP-T19P	111			
0001200100010003	Yealink SIP-T48G	130			
0001200100010004	Polycom WX 400	111			
0001200100010005	Yealink SIP-T21P	120			
0001200100010006	Panasonic UTG200test	200			
0001200100010007	Algo 8028 SIP Door Phone	200			
0001200100010008	Polycom WX 600 Test	1005a			
0001200100010009	Cisco spa303	100			
0001200100010010	Polycom 301	100			
0001200100010011	Cisco spa502G	1005b			
0001200100010012	Polycom WX900	111			
0001200100010013	Yealink SIP-T19P	200			
0001200100010014	aastra delete me	120			
0001200100010015	Panasonic UTG300	130	200	1005b	

Filtering Phone Hardware

Using the **Filter** button, you can filter phone hardware and view only the phones of interest to you.

1. From the **Phone Hardware** tab, click the **Filters** button. The Phone Hardware Filters pop-up window appears.

2. Complete the fields (see Table 10-2).
3. Click **Set Filters**. The **Phone Hardware** tab shows only the phones that match your criteria. If no phones match your criteria, a message informs you that there are no matches to your filter.

Table 10-2. Phone Filter Settings

Setting	Description
MAC Address	Enter all or part of the MAC address of the phones you want to view.
Make and Model	Select the make and model of the phones you want to view,
Notes	Enter optional notes about this phone filter.

Adding Phones

To add phones:

1. From the **Phone Hardware** tab, click the **Add Phone** button. The Add Phone pop-up window appears, with the **Basic** tab displayed.

The screenshot shows a dialog box titled "Add Phone" with a close button (X) in the top right corner. The dialog has two tabs: "Basic" and "Advanced". The "Advanced" tab is currently selected and highlighted in blue. Below the tabs, there are three input fields:

- Model:** A dropdown menu with the text "Select a Phone Model" and a downward arrow icon.
- MAC Address:** A text input field with the placeholder text "Please enter MAC Address".
- Notes:** A larger, empty text input field.

At the bottom right of the dialog, there are two buttons: a "Cancel" button and a "Save" button.

2. Complete the fields in the **Basic** tab (see Table 10-3). The fields that appear are based on the make and model of the telephone selected.
3. Click **Advanced**, and then complete the fields in the tab (see Table 10-4). The fields that appear are based on the make and model of the telephone selected.

Add Phone ×

Basic **Advanced**

Transport Method ▼

4. Click **Save**.

Table 10-3. Basic Phone Settings

Setting	Description
Model	Adding a phone: enter the telephone's make and model. The remaining fields that appear in this window depend on the make and model selected. Editing a phone: read-only field that shows the phone model.
MAC Address	Adding a phone: enter the telephone's MAC address. Editing a phone: read-only field that shows the phone's MAC address.
Line	If your phone make and model have one or more lines, enter them in these fields. The lines available for selection appear if the Add Phone Extension check box is checked when adding a user (see Table 4-1 on page 20).
Notes	Enter optional notes about this phone.

Table 10-4. Advanced Phone Settings

Setting	Description
Directory	If this setting is available for your make and model of phone, select a directory for this phone.
Preferred Server	If this setting is available for your make and model of phone, select the preferred server you want to associate with this phone.
Transport Method	Select a transport method for the phone. Choices are: <ul style="list-style-type: none"> • UDP • TCP • TLS

Editing Phones

To edit phones:

1. From the **Phone Hardware** tab, either:

- Click a MAC address

OR

- Hover over a phone, and then click the  icon at the far right of the **Phone Numbers** tab. For example:

Click a MAC address or...

...click this icon

MAC address	Model	Line 1	Line 2	Line 3	Notes
0800000000000000	Grandstream GXP-2130	201			 
0800000000000000	Yealink SIP-T19P	111			 

Either step displays the Edit pop-up window. For example:

Edit Grandstream GXP-2130 (00:0B:82:66:39:F4)

Basic **Advanced**

Model
Note: Model cannot be changed

MAC Address
Note: MAC Address cannot be changed

Line 1

Line 2

Line 3

Notes

Cancel Save

- Complete the fields in the **Basic** and **Advanced** tabs (see Table 10-3 on page 100 and Table 10-4 on page 101).
- Click **Save**.

Exporting Phone Hardware Information

You can export phone hardware information in CSV format, and then open the information in Microsoft Excel for further manipulation.

1. From the **Phone Hardware** tab, click the **Export** button.
2. When prompted, click **Save**.



11. VIEWING CALL HISTORY

Topics:


- ^ *Displaying the Call History Page (see page 104)*
- ^ *Filtering Call History (see page 105)*
- ^ *Exporting Call History (see page 106)*

Call history allows you to review, filter, and export call logs for greater analysis.

Displaying the Call History Page

All call history tasks are performed from the Call History page. To display this page, click the **Call History** icon on the menu bar:



The following figure shows an example of the Call History page. The  button at the top-right side of the page refreshes the information on the page.

Number	Name	Date	Duration
1 (555) 123-4567	XYZ TELECOM	Today, 9:46am	8:23
5233	Kevin	Today, 8:01am	51:35
5229	Joseph	Today, 7:36am	0:31
*79	Voicemail	Today, 7:08am	0:04
5222	Mamta	Yesterday, 5:28pm	1:51
*78	Voicemail	Yesterday, 5:05pm	0:04
Prompt-Retrieve	Kevin	Yesterday, 3:14pm	0:00
5216	Jim	Yesterday, 3:14pm	5:05
(555) 600-3806		Yesterday, 2:27pm	0:24
5227	Erin	Yesterday, 1:24pm	40:31
5226	Chris	Yesterday, 1:23pm	41:01
5217	Debbie	Yesterday, 1:17pm	21:04
5222	Mamta	Yesterday, 1:10pm	53:42
5215	Chris	Yesterday, 1:09pm	54:48

Filtering Call History

Using the **Filter** button, you can filter your call history and view only the events of interest to you.

1. From the Call History page, click the **Filters** button. The Call History Filters pop-up window appears.

2. Complete the fields (see Table 11-1).
3. Click **Set Filters**. The Call History page shows only the events that match your criteria. If no events match your criteria, a message informs you that there are no matches to your filter.

Table 11-1.Call History Filter Settings

Setting	Description
Date Range	Select the From and To dates for the events you want to view. The maximum From-To range is 31 days.
User	Enter the name or extension you want to view.
Caller Number	Enter the caller number you want to view.

Viewing Call History

Setting	Description
Dialed Number	Enter the dialed number you want to view.
Call Type	Enter the type of call you want to view. Choices are: <ul style="list-style-type: none">• Inbound• Outbound• Missed

Exporting Call History

You can export the call history in CSV format, and then open the information in Microsoft Excel for further manipulation.

1. From the Call History page, click the **Export** button.
2. When prompted, click **Save**.



12. TAKING A PHONE HOME

Topics:

- ^ *Installing a Phone at Home (page 108)*
- ^ *Troubleshooting a Remote Phone (page 108)*

Depending on your office's network configuration, you may be able to use your phone at home.

Installing a Phone at Home

To install the phone at home, you need an Ethernet cable and an AC power supply.

1. Plug either end of the Ethernet cable into the phone's LAN jack.
2. Connect the other end of the cable to your home router or switch.
3. Connect the supplied the AC adapter to the phone and to a working AC outlet. The phone is now ready for use.

Note: Your provider cannot guarantee call quality or reliability with phones not on the provider's data network. In addition, E911 services might not work properly when removing a phone from the office.

Troubleshooting a Remote Phone

In the unlikely event you encounter a problem using the phone at home, consider the following troubleshooting suggestions.

Problem	Corrective Action
Phone can make a call but lacks audio or cannot receive calls.	There might be a problem with your home network. Ensure that your network does not have double <u>Network Address Translation (NAT)</u> or SIP <u>Application Layer Gateway (ALG)</u> disabled on the router. Your provider cannot reconfigure home network; however, your provider will provide technical assistance to your IT staff or vendor.
Your home router is in a different room from the phone, and Ethernet wiring isn't available between the rooms.	Consider using a HomePlug Powerline solution. Your provider does not provide or support HomePlug systems, but such solutions are available from office supply and electronics stores.
Phone does not work at all.	Contact your provider for technical support. Before calling, have the phone's MAC address ready.
Phone can make and receive calls but call quality or reliability is poor.	<ul style="list-style-type: none"> • For connecting your phone/<u>softphone</u>, use <u>Ethernet</u> instead of <u>Wi-Fi</u>. • Check the quality of your internet connection at http://myspeed.visualware.com. If your <u>Mean Opinion Score (MOS)</u> is below 4, your Internet connection lacks the speed or quality to support an <u>IP phone</u>. • Your router may be able to prioritize SIP (IP Phone) traffic. Have your IT staff or vendor configure the Quality of Service on your router. <p>Your provider cannot guarantee call quality or reliability with phones not on the provider's data network.</p>



APPENDIX A. GLOSSARY

Term	Definition
<u>Application Layer Gateway</u>	A router component that theoretically helps with NAT traversal. In reality, phones can traverse NAT, so ALGs should be disabled.
<u>Answering rule</u>	A rule that specifies how to handle calls for a time frame.
<u>Auto attendant</u>	A feature that transfers calls to the appropriate destination (an extension, voice mail, or recording, for example) without human intervention, by prompting callers to press buttons on their phone keypads.
<u>Call forwarding</u>	A Cloud PBX feature that allows you to forward or redirect incoming calls to an alternate number.
<u>Call queue</u>	A call queue allows you to put callers in a waiting line until a person (a.k.a. agent) is available to help them. While enqueued callers will listen to Music on Hold and, depending on the configuration, may have options to leave the queue.
<u>Call screening</u>	Prompts callers to say their name, and then lets you screen the call before accepting it.
<u>Conference bridge</u>	Allows a group of people to participate in the same phone call by dialing in using their own phone.
<u>Dial-by-name directory</u>	An auto attendant feature that allows callers to contact employees by knowing their name. The directory is set up by your company and can include the first or last name of all employees. When the caller specifies the first or last name of a person they are trying to reach, the directory confirms the name and connects the caller to that person automatically.
<u>Dialing permission</u>	Defines the types of calls a user can and cannot make. For example, a dialing permission might prevent a user from dialing international calls.
<u>Direct Inward Dial</u>	A service where each user can have a dedicated phone number to reach them, bypassing the auto attendant or receptionist.
<u>Do Not Disturb</u>	The ability of the Cloud PBX phone to ignore any incoming calls.
<u>E911</u>	Enhanced 911. A system used in North America that provides emergency service on cellular and Internet voice calls.
<u>Ethernet</u>	A family of networking technologies for LANs.
<u>Extension</u>	A numerical way to dial a user on your system from a phone (e.g., Bob Smith is extension 111).
<u>Handset</u>	A device that a user holds to the ear to hear the audio sound through a phone. Handsets usually include the phone's transmitter (microphone), which is positioned close to the mouth. A handset is also sometimes used to refer to the entire phone.
<u>IP phone</u>	A telephone handset designed for a VoIP phone system. Instead of being connected to traditional phone lines, IP phones have ports to connect to a LAN.
<u>LAN</u>	Local-area network. A group of computers and other devices that share a common communications line. These devices often share a server and are located within a small geographic area.
<u>Log</u>	A file that records events that occur in the Cloud PBX system.
<u>MAC address</u>	Media Access Control address. A unique identifier assigned to network interfaces for communications on the physical network.
<u>Mean Opinion Score</u>	A test that used in telephony networks to estimate the human user's view of the quality of the network.
<u>Music on Hold</u>	Music or announcements that callers listen to while on hold.
<u>Network Address Translation</u>	Converts your private LAN IP address to a public IP address, allowing traffic to go out to the Internet and route back to the correct device on your LAN.

Taking a Phone Home

Term	Definition
<u>Offnet</u>	Off-network calls. Calls placed to a network other than your network.
<u>PBX</u>	Private Branch Exchange. also known as a phone system. A PBX provides an expanded range of voice services such as phone extensions, call forwarding, paging, voicemail for each user.
<u>Server</u>	A computer that is dedicated to a particular purpose. Typically, a server provides information to client computers upon request. For example, a voicemail server manages all voicemail-related functions, and client computers access that server to retrieve or send voicemail.
<u>Simultaneous ring</u>	Allows multiple phones to ring at the same time. For example, you can configure the system so that when someone calls an office number, a desk phone and a mobile phone can ring simultaneously.
<u>SIP</u>	Session Initiation Protocol. The standard protocol for Voice Over IP communications. For example, when making a call from one extension to another on a VoIP phone system, SIP sets up the call and creates the connection between the two extensions.
<u>Softphone</u>	IP telephony software that allows users to send and receive calls from non-dedicated hardware, such as a PC or Smartphone. It is typically used with a headset and microphone.
<u>Time frame</u>	In the Cloud PBX system, a configuration that is applied to a specific period of time, such as a holiday. A time frame does not go into effect until you apply it to an answering rule or auto attendant greeting. When the time frames are applied, the first matching time frame becomes active.
<u>Trunk</u>	A communications channel between two points.
<u>Uniform Resource Locator</u>	The address of a specific site on the Internet. A URL cannot have spaces or certain other characters, and uses forward slashes to denote different directories. For example, http://web.mit.edu/ .
<u>Voicemail</u>	A feature that allows callers to deliver voice information using an ordinary telephone and allows the system to process those transactions.
<u>Wi-Fi</u>	A popular wireless networking technology that uses radio waves to provide wireless high-speed Internet and network connections.



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PBX Admin/Office Manage Guide

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