Call Management Portal
User Administration Guide

Blue Platform

Contents

Introduction

This user guide provides instructions on how to use the web portal to manage your calling features on the Telesystem Blue Call Management Portal. The web portal allows you to customize your calling experience by configuring features such as:

- **Call forwarding**: You can configure your phone to forward calls to another number when you are not available.
- **Do not disturb**: You can set your phone to "Do not disturb" so that you are not interrupted by calls.
- **Voicemail**: You can configure your voicemail settings, such as the greeting and the messages that you want to keep.
- **Other features**: The web portal also allows you to configure other calling features, such as call waiting, caller ID, and three-way calling.

The web portal is a powerful tool that can help you to customize your calling experience and improve your productivity. This guide will walk you through the process of using the web portal step-by-step.

Here are some of the benefits of using the web portal to manage your calling features on the Telesystem Call Management Portal for Blue Platform:

Flexibility: The web portal allows you to customize your calling experience to meet your specific needs. You can configure different features for different times of day, and you can change your settings as your needs change.
Scalability: The web portal is scalable to meet the needs of growing businesses. Administrators can modify users, configure new features, and add adjust call flows as your business grows.
Security: The web portal is secure and protects your data. All interactions with the web portal are encrypted.

If you are looking for a way to customize your calling experience and improve your productivity, the web portal is a great option. This user guide will walk you through the process of using the web portal step-by-step.

Please note that the options visible within the web portal are dynamic and dependent on the package and licensing assigned to the user or line. If you have questions about packages and licensing, please have your approved point of contact reach out to your Telesystem Account Manager or contact the helpdesk by phone at 888.808.6111 or via email at support@trusttelesystem.com.

Accessing the Telesystem Call Management Portal

To access the Telesystem Call Management Portal, navigate to
https://UCCallPortal.trusttelesystem.com on your web brower. Firefox and Google Chrome are
the recommended web browsers for accessing the portal.

When you are presented with the login page, enter your credentials for the *Email or ID* and
Password. Then click **Log in**.
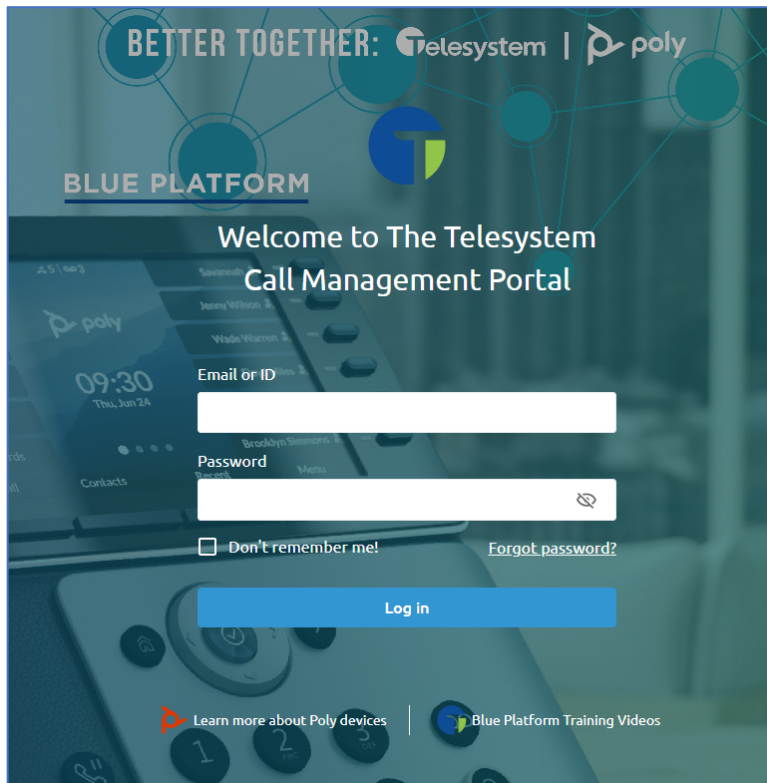
Don't Remember me! – check this box if you do not wish to have your login credentials cached
locally on the device you are logging in from

If you have forgotten your password, click the *"Forgot Password?"* link. Enter your Username
(Email or ID) and click Submit. An email will be sent to you with a password reset link. Follow
the instructions to complete the password reset.
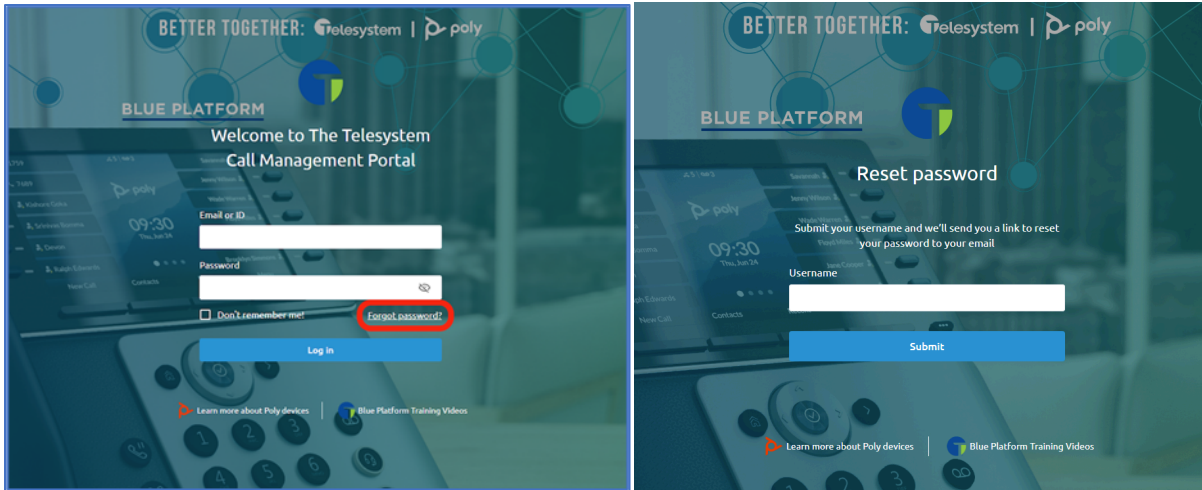
The following hyperlinks are available on the bottom of the login page:

Learn more about Poly devices
Blue Platform Training Videos

First Login – Setup Wizard

On the first login to the Call Management Portal, users will be provided with a setup as seen below:
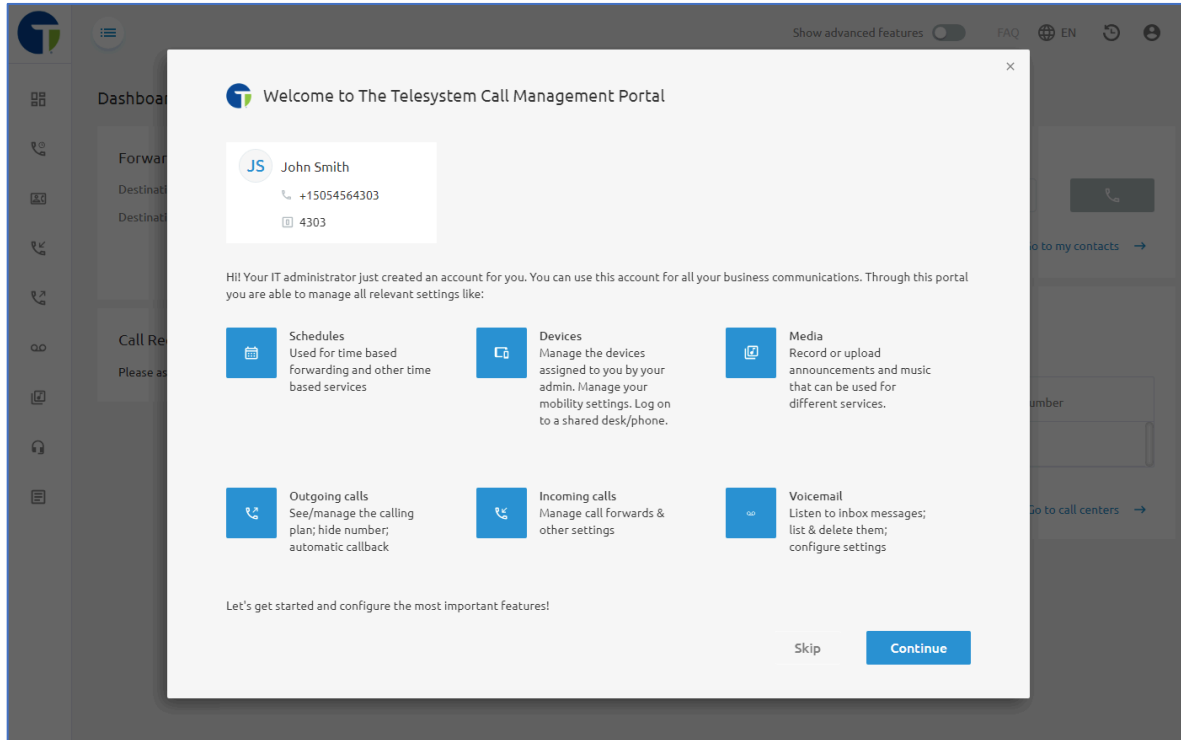
Users may choose to **Skip** this process and manually manage individual features through the menu options as needed or choose **Continue** to step through the initial setup process for their account.

The Setup Wizard will guide users through the following areas:

- **Mobility** – Link one or more personal numbers (cell phone or home phone) to your business account as a Find Me – Follow Me type service.
- **Inbox Settings** – Customize how you want to manage your voicemail inbox.
- **When Busy** – Setup a voicemail notification to notify callers that you are busy and unable to take their call currently.
- **No Answer** – Setup a voicemail notification to notify callers you are currently unable to take their call.
- **On Leave** – Setup a voicemail notification to notify callers you will be out of office for an extended period, and you are unable to take their call at this time.
- **Incoming Calls** – Choose to forward calls and set a destination when you are busy or do not answer as opposed to sending those calls to voicemail.
- **Device** – See all devices that are assigned to your account, including softphones like Webex.

Dashboard

The Dashboard is the first page displayed after their initial login. On the Dashboard users have quick access to the following settings (enabling the *Show advanced features* option at the top of the screen will display additional features not displayed by default)
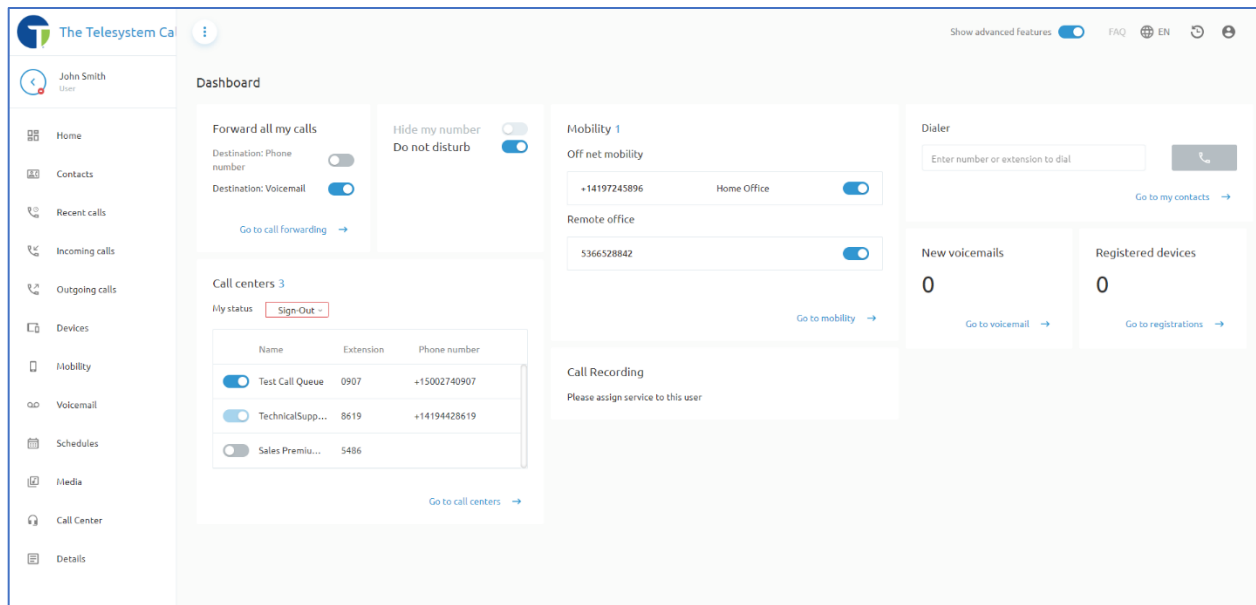
- **Forward all my calls** – toggle switches where you may enable or disable the call forward feature to a destination phone number or voicemail. If you enable for a destination number, a pop-up window will appear where you may enter the phone number or extension where you want calls forwarded.
- **Hide my number** – allows you to block your phone number for outbound calls.
- **Do not disturb** – allows you to block inbound calls to your number. If you have voicemail, calls will immediately be redirected to the voicemail box. If no voicemail is enabled on your account, calls will receive a busy signal.
- **Mobility** – Configure outside lines to receive inbound calls using a find me – follow me type feature. Good for receiving inbound calls to your desk phone as well as your cell phone or home phone.
- **Remote Office** – Feature that allows users to dictate a number that inbound calls can route to (on-net or off-net), including home phones and mobile phones. Users can utilize some feature access codes while fielding calls this way because they are still managed through the Telesystem Blue Platform, unlike call forwarding calls that are managed by the phone carrier the call is forward to.
- **New Voicemails** – Displays the number of new voicemail messages currently pending.
- **Dialer** – Allows users to enter a phone number or select a contact they want to place an outbound call to.

- **Registered Devices** – Quick access to view devices that are registered on that line. Registered devices are devices that are online and have connectivity, which means they can be used to make and receive calls from the platform.
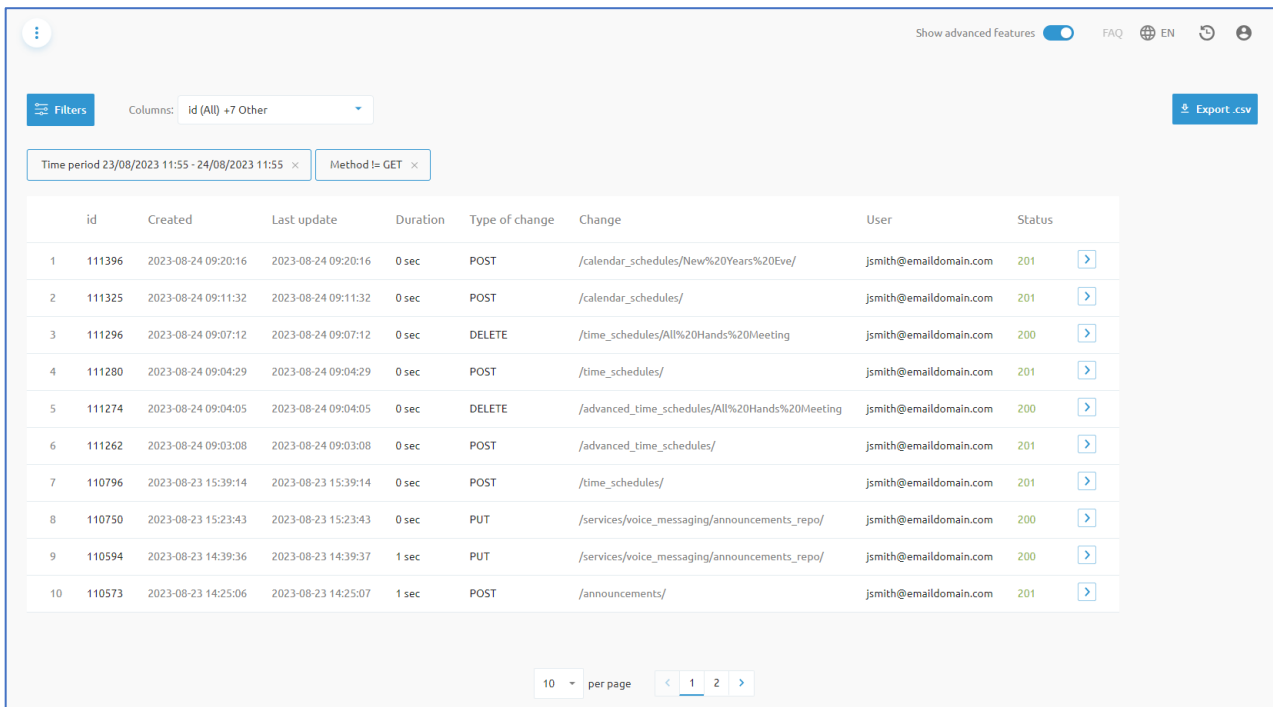- **Call Centers** – Users with agent or supervisor licensing will have access here to see the status of their call center account (signed in, signed out, available, unavailable). A drop-down box is available to manage agent status right from the dashboard. Agents assigned to multiple Call Centers or queues can also use a toggle switch for each Call Center to manually opt-in or opt-out of those queues if the configuration allows agents to do so.
- **Call Recording** – Users with call recording enabled will see a call recording section with options to manage the call recording settings.

🌐 Language Menu

Clicking on the Language icon 🌐 EN in the upper right corner of the screen will display a drop-down menu of languages available for the portal.

🕘 Change Log

Clicking on the Change Log icon 🕘 in the upper right corner of the screen will display the list of all recent changes that have occurred to your user account. This list can be filtered and exported as needed.
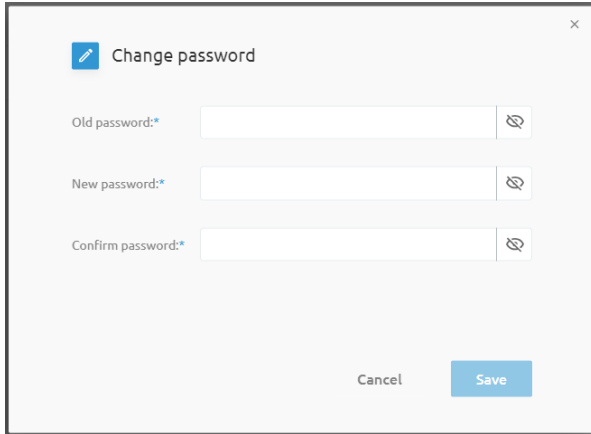
	id	Created	Last update	Duration	Type of change	Change	User	Status	
1	111396	2023-08-24 09:20:16	2023-08-24 09:20:16	0 sec	POST	/calendar_schedules/New%20Years%20Eve/	jsmith@emaildomain.com	201	>
2	111325	2023-08-24 09:11:32	2023-08-24 09:11:32	0 sec	POST	/calendar_schedules/	jsmith@emaildomain.com	201	>
3	111296	2023-08-24 09:07:12	2023-08-24 09:07:12	0 sec	DELETE	/time_schedules/All%20Hands%20Meeting	jsmith@emaildomain.com	200	>
4	111280	2023-08-24 09:04:29	2023-08-24 09:04:29	0 sec	POST	/time_schedules/	jsmith@emaildomain.com	201	>
5	111274	2023-08-24 09:04:05	2023-08-24 09:04:05	0 sec	DELETE	/advanced_time_schedules/All%20Hands%20Meeting	jsmith@emaildomain.com	200	>
6	111262	2023-08-24 09:03:08	2023-08-24 09:03:08	0 sec	POST	/advanced_time_schedules/	jsmith@emaildomain.com	201	>
7	110796	2023-08-23 15:39:14	2023-08-23 15:39:14	0 sec	POST	/time_schedules/	jsmith@emaildomain.com	201	>
8	110750	2023-08-23 15:23:43	2023-08-23 15:23:43	0 sec	PUT	/services/voice_messaging/announcements_repo/	jsmith@emaildomain.com	200	>
9	110594	2023-08-23 14:39:36	2023-08-23 14:39:37	1 sec	PUT	/services/voice_messaging/announcements_repo/	jsmith@emaildomain.com	200	>
10	110573	2023-08-23 14:25:06	2023-08-23 14:25:07	1 sec	POST	/announcements/	jsmith@emaildomain.com	201	>

Change Password

Clicking on the User Profile icon in the upper right corner of the screen will display a drop-down menu with the *Change Password* option.

Navigation Menu

Select the stack icon at the top of the page to expand the left side menu.

Back Button

Clicking on this icon returns you to the previous screen. This button can only be used to back up one page/menu. Once it has been used, you can navigate to another page/menu in the portal and use it again.

This label also shows the name of the user currently logged into the User Admin portal.

Clicking on the dot in the lower right side of the icon gives you the ability to toggle your status between *Available* and *Do Not Disturb*.

Home

Returns you to the initial dashboard screen.

Recent Calls

Displays a list of all calls placed/received/missed by this account.

- Search bar – search for a call by any information from any column.
- Show filter – displays only calls matching the selected filter.
- Column sort – entries can be sorted by any column heading by clicking the heading title.
- Status – identifies the type of call.
    - Outgoing Call
    - Incoming Call
    - Call Rejection, No Answer/Missed Call
- Call log actions – follow up actions you can take with the numbers from the call log.
    - Place a call to the number listed.
    - Add the listed number to Contacts.

Call Logs

Q Search		Show:	Select ▾		
Status	Name	Phone number	Country code	Date & Time	
↗	Unavailable	+14197249898	+1	17.08.2023 11:47	☎ +
✗	TELESYSTEM - NO	+14197249898	+1	17.08.2023 11:45	☎ +
↙	TELESYSTEM - NO	+14197249898	+1	17.08.2023 11:44	☎ +
↗	Unavailable	+14197249800	+1	17.08.2023 11:40	☎ +

10 ▾ per page < 1 >

Contacts

The Contacts menu gives you the ability to view and modify all your personal/company contacts.

- Speed Dials
    - Speed dial numbers allow dialing a configured number using a <u>single-digit</u> code associated with a string of digits (0-9, *, #). Once defined, you can dial this single digit instead of the full string.
    - Click the phone icon   to direct dial the desired contact.
    - Click any open line number to add a new contact.
        1. **Free Entry** allows you to add any contact by name and phone number.
        2. **Select from contacts** allows you to choose a name from the corporate directory.
    - You can **Edit/Delete** any entry by clicking on the associated line number.
    - To dial the desired speed dial, dial # (+) the single digit code (example - #2)
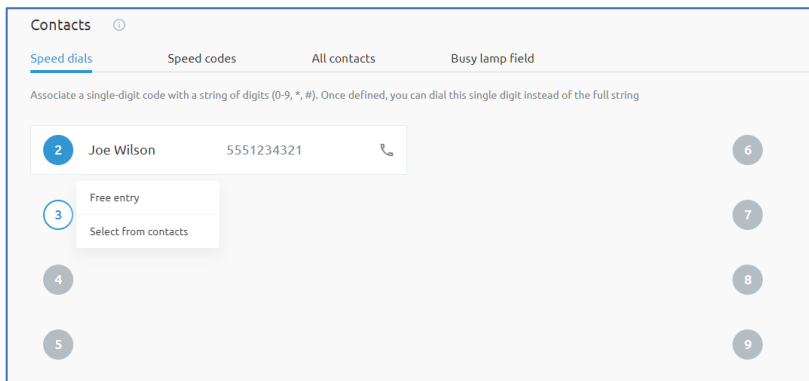
- Speed Codes
  - Speed Codes allow dialing a configured number using a <u>double-digit</u> code associated with a string of digits (0-9, *, #). Once defined, you can dial this double-digit instead of the full string.
  - Choose the prefix code (0X, 1X, 2X…) you would like the speed code to begin with
  - Click any open line number to add a new contact.
    1. **Free Entry** allows you to add any contact by name and phone number.
    2. **Select from contacts** allows you to choose a name from the corporate directory.
  - You can **Edit/Delete** any entry by clicking on the associated line number.
  - To dial the desired speed code, dial # (+) the two-digit code (example - #12)
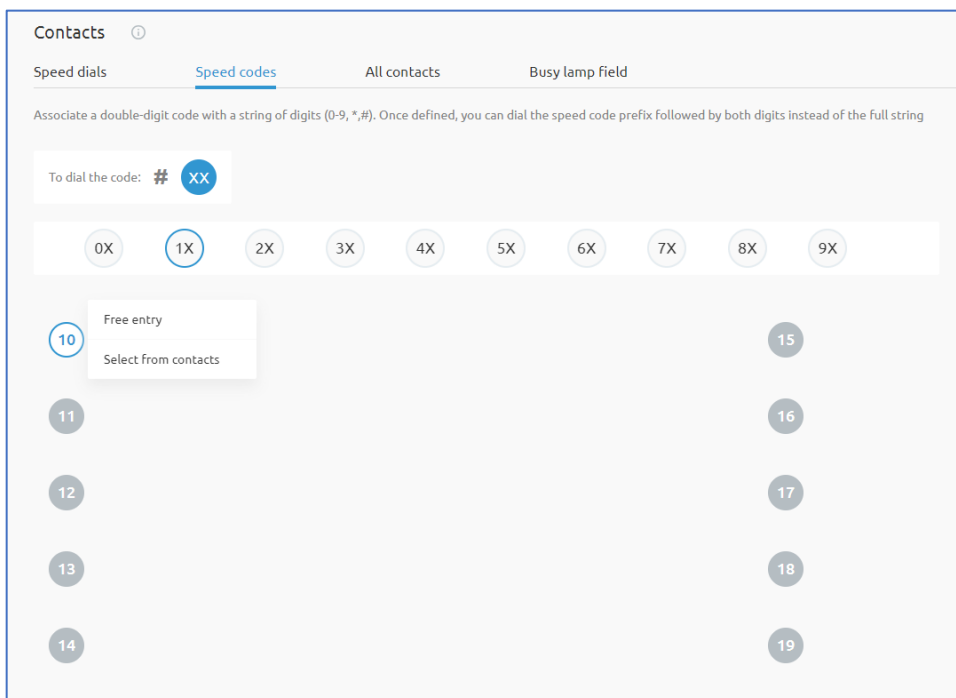
- All Contacts

  All Contacts gives a view of all your and the company's contacts. It gives you the phone book of your system.

  - Search Bar - search for a contact by any information from any column
  - Show Filter - You can filter between designated contact types in the list.
    1. **My Contacts** are created by the end user as a personal phone book (add your own contacts You can edit these contacts yourself (modify name and/or number, delete).
    2. **My Colleagues** are corporate phone books that cannot be edited by the End User.
    3. **Call Flows** are dummy numbers that are being used to generate a certain service, like an Automated Attendant on the main number and cannot be edited by the End User.

  - The End User can take the following actions:
    1. **Bulk Action**: upload new contacts or update existing contacts in batch mode.
    2. **Download all**: generates a .csv file with all the existing contacts.
    3. **Delete contact**: removes the contact from your contact list (you must select the contact for the function to become active.)
    4. **Add contact**: creates a new contact and adds it to your personal contact list.

			Name ↓	Phone number	Extension	Type	Mobile number
ⓘ	21		test call center (Call Center)		1456	Call flows	
ⓘ	6	V	VVX350,Poly	+15002740900	0900	Colleague	

Contacts ⓘ

Speed dials   Speed codes   All contacts   Busy lamp field

Here is a list of your colleagues, contacts and call flows of your site

Search   Show: All   Bulk action   Download all   Delete contact   Add contact

- Busy Lamp Field

  The Busy Lamp Field (BLF) service allows you to monitor whether a colleague is available. Depending on his/her status the corresponding LED or button will appear different on your phone.

  - Select the Add button ⊞ Add to see the list of contacts available to be added to the BLF screen. Check the desired users from the list in the pop-up screen and save to add users to the main Busy Lamp Field list.
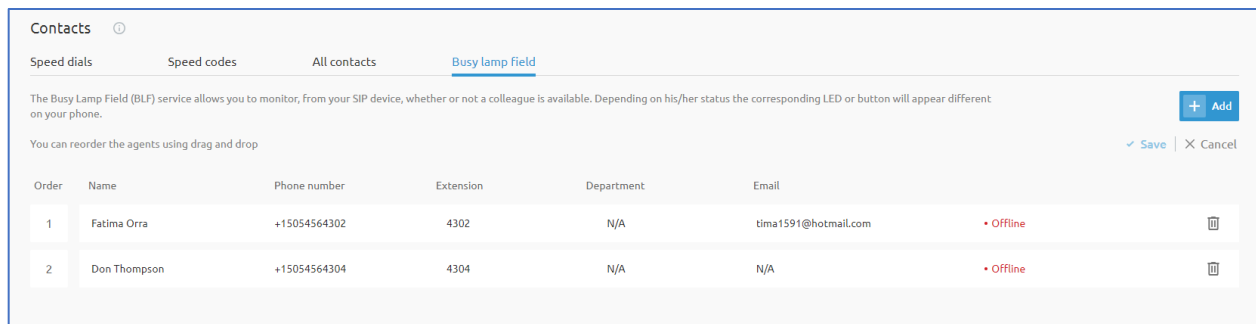
Incoming Calls

Allows a user to define what will happen when they receive an inbound call. The *Show Advanced Features* option must be active to see all the options listed below.

- Do Not Disturb

The Do Not Disturb feature allows you to send your calls directly to your voice messaging box without ringing your phone.

- Announcement

This service allows you to play an audio announcement to callers before the call is connected.

- To choose a prepopulated announcement:
  1. Select the desired Audio File from the drop-down menu.
  2. Save the selected audio file.
  3. Enable the Prealerting Announcement feature by clicking the top radio button.
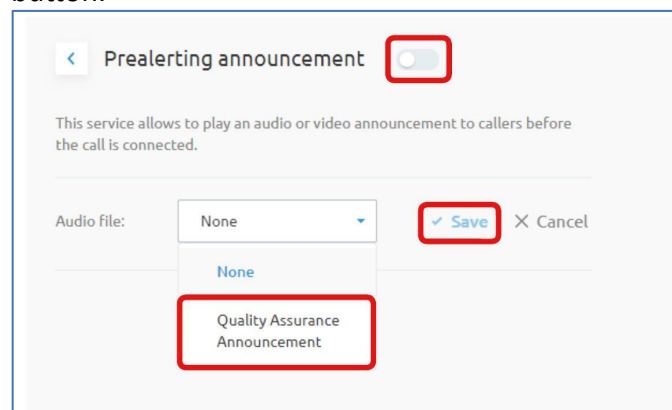
- Users can create a personal announcement by following the instructions in the **Media** section of this guide. Once the new media file is created, it will appear in the Audio file drop down box.

- Rules can be created to only trigger this behavior at certain days, hours or for specific callers.

- To create the rule set for the announcement once the audio file has been selected and the service enabled:
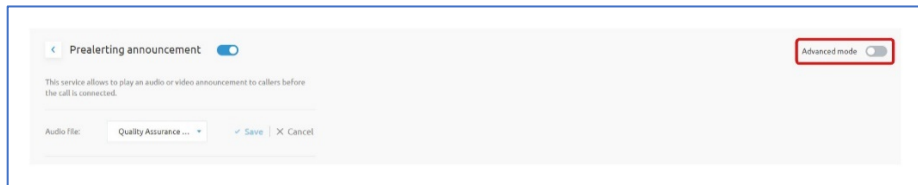 1. Click the *Advanced Mode* radio button in the upper right corner of the screen

  2. Populate the **New Rule** screen.
     a) Type a name for the new rule in the *New criterium name* field.
     b) Choose the *Action* selection (Play Announcement, Don't Play Announcement) for this rule. This will determine if you want the announcement to play or not following the parameters set in the following steps.
     c) Click *Next*
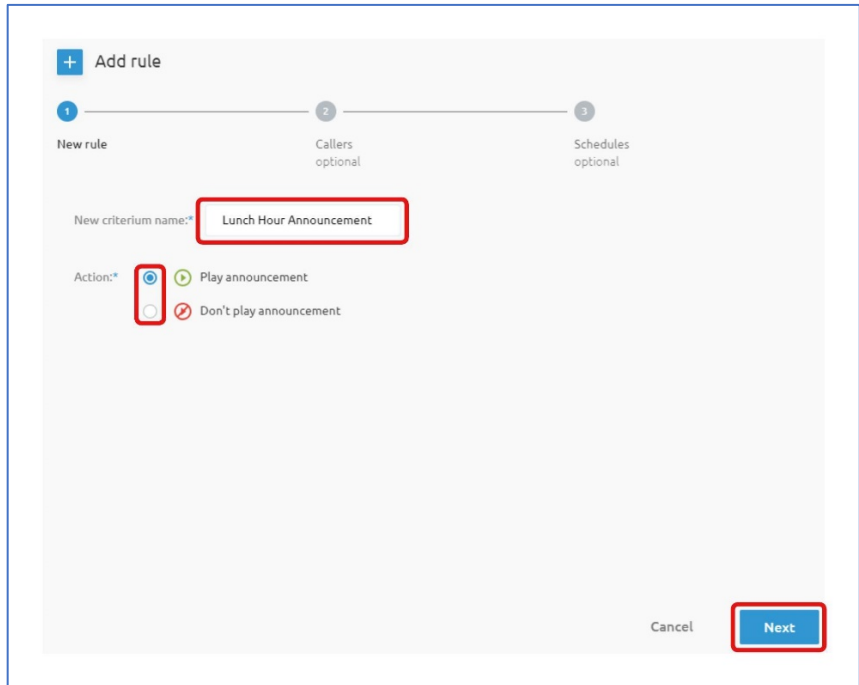
  3. Populate the **Callers** screen to designate the callers that will receive this announcement.
     a) To apply announcement to all inbound calls, just click *Next.*

b) To specify certain callers that will receive the announcement, check the *Apply for specific callers* box.

c) Check the *Include anonymous/unavailable callers* check box(es) to enable either of these parameters.

d) To add specific phone numbers that will receive the announcement, click the (+) icon
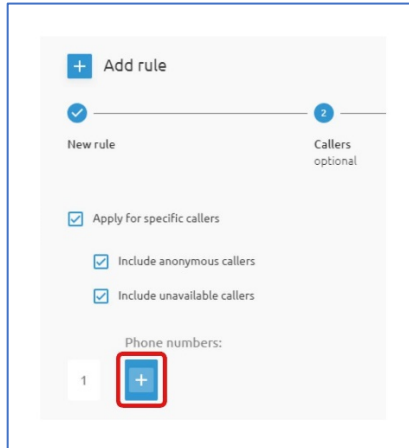
e) Type the desired phone number into the field. Click the (+) icon for each additional number needed.

f) Click *Next* when all the phone numbers have been added
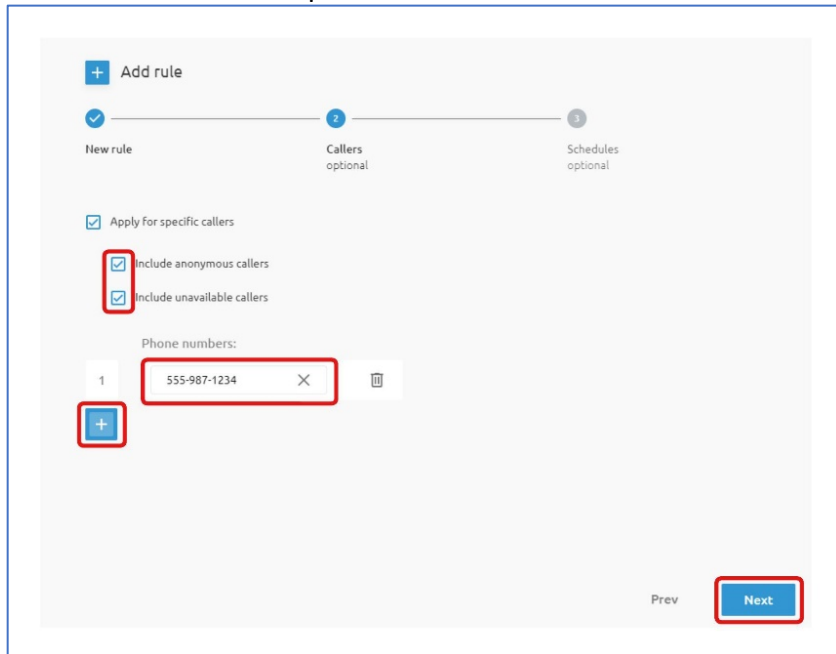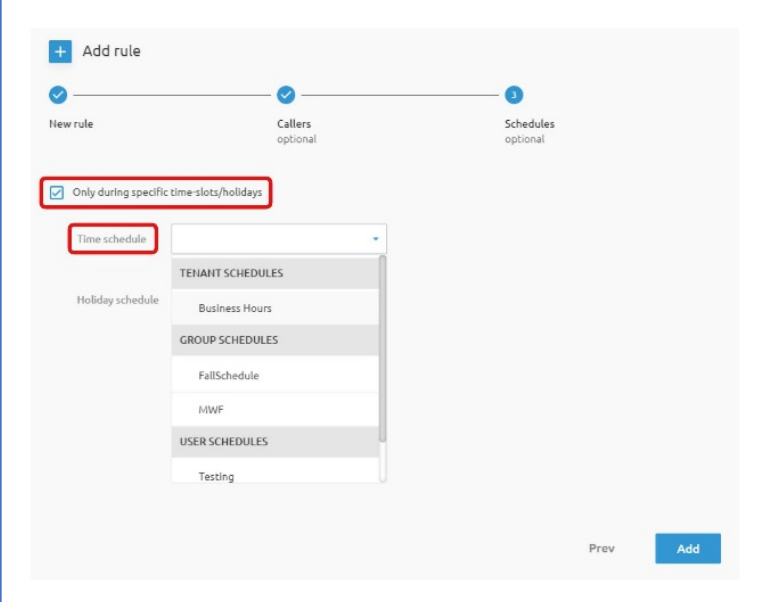
4. Populate the **Schedules** screen to add the specific schedules you would like the announcement to play.

   a) To designate the announcement to always play when the announcement feature is enabled, just click ***Add***.

b) To apply a specific schedule to the announcement, check the *Only during specific timeslots/holidays* box

c) Choose the appropriate Time Schedule from the drop-down menu

- o Schedules are divided into three categories.
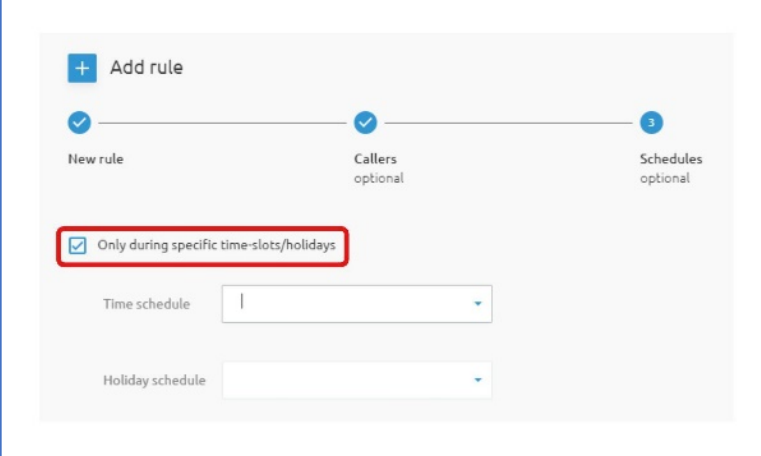 - *Tennant Schedules* and *Group Schedules* are prepopulated to the list and are not manageable by the end user.
  - *User Schedules* are created by the end user and must be created prior to assigning to this rule. Once the new schedule is created, it will appear in the Time Schedules drop down box under the User Schedules section.
  - Instructions for creating a User Schedule are outlined in the Schedules section of this guide.

d) Choose the appropriate Holiday Schedule from the drop-down menu

○ Holidays are divided into three categories.
- *Tennant Schedules* and *Group Schedules* are prepopulated to the list and are not manageable by the end user.
- *User Schedules* are created by the end user and must be created prior to assigning to this rule. Once the new schedule is created, it will appear in the Holiday Schedules drop down box under the User Schedules section.
- Instructions for creating a User Schedule are outlined in the Schedules section of this guide.

e) Click the *Add* button to complete the rule.

- Any configured schedule can be enabled/disabled, edited, deleted, or viewed by selecting the appropriate icon for that schedule
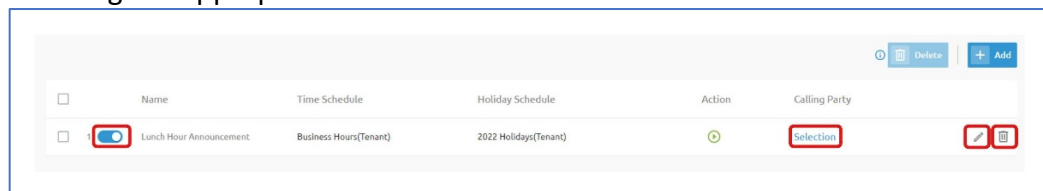
- Call Forwarding Services

Forwards your inbound call depending on the status of your phone line (busy, no answer, unavailable). There are four parameters that can apply to the Call Forwarding service. Each can be enabled/modified by clicking the edit icon next to the appropriate option
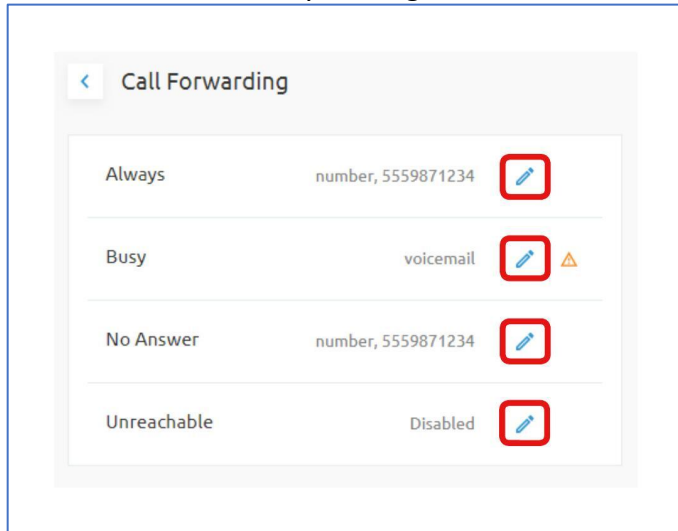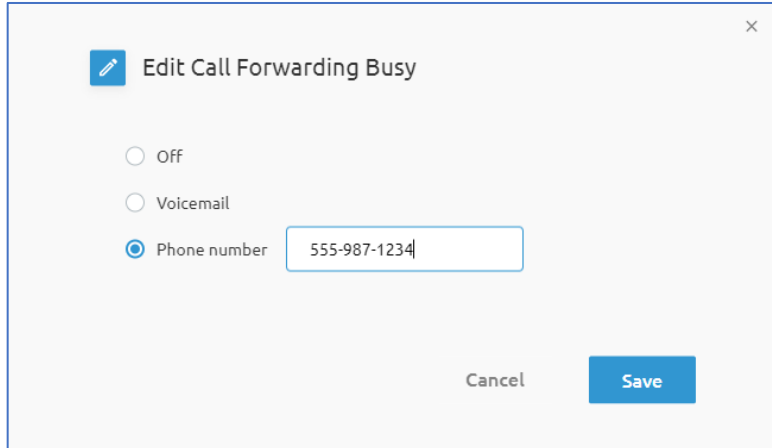
- o *Call Forward Always*

Enabling this option will always forward all incoming calls directly to your voicemail, or to a designated phone number that you populate in this screen.
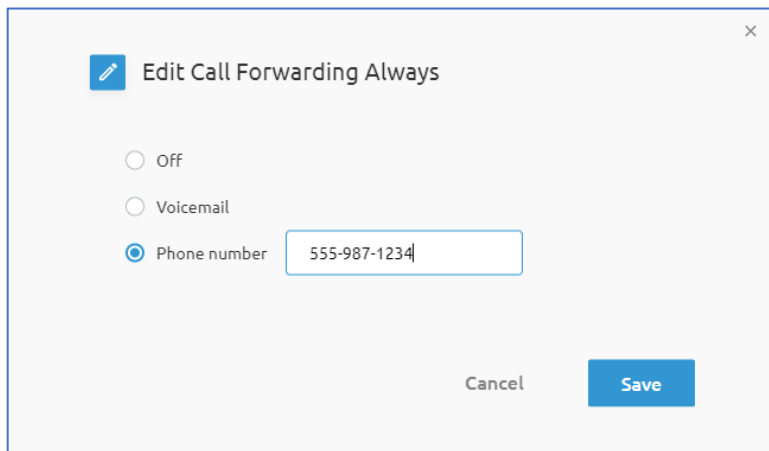
o *Call Forward Busy*
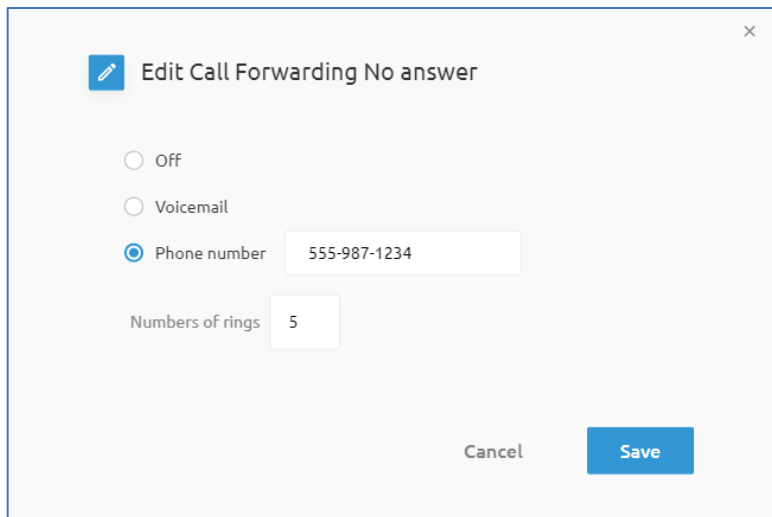
Enabling this option will only forward your incoming calls if your line is busy. Calls will be forwarded directly to your voicemail, or to a designated phone number that you populate in this screen.

Edit Call Forwarding Busy

○ Off
○ Voicemail
◉ Phone number   555-987-1234

Cancel   **Save**

o *Call Forward No Answer*

Enabling this option will only forward your incoming calls if the call is not answered within a predetermined number of rings that you configure in this screen. Calls will be forwarded directly to your voicemail, or to a designated phone number.

Edit Call Forwarding No answer

○ Off
○ Voicemail
◉ Phone number   555-987-1234

Numbers of rings   5

Cancel   **Save**

o   *Call Forward Unreachable*

Enabling this option allows you to forward all your incoming calls to a different phone number when/if your device is not accessible by the Hosted VoIP Phone System. Calls can only be forwarded to a designated phone number that you configure in this screen.
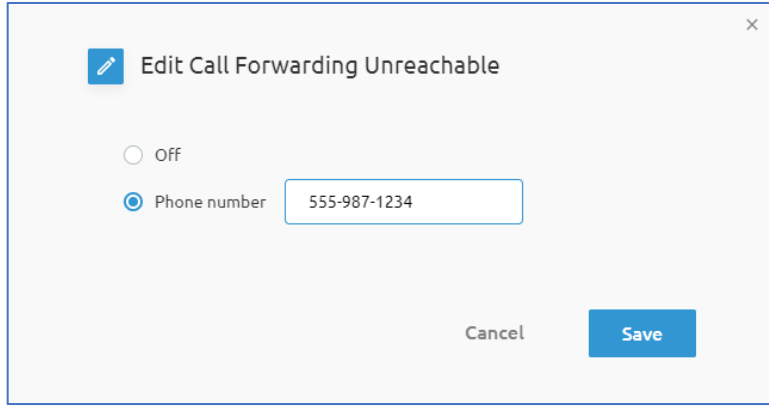
o   *Selective Forwarding*

Call Forwarding that will only be applied during certain time periods or on specific days or for specific callers.

1. The Selective Forwarding feature can be enabled/disabled by sliding the radio button at the top of the page.
2. **Default Destination** – Phone number selected by default for all selective forwarding calls unless an alternate number is specified in the custom Time Based/Calendar Based/Other rules.
3. **Play Ring Reminder when a call is forwarded** – When enabled, an audible half-ring will be heard on the primary desk phone to indicate the call has been forwarded.
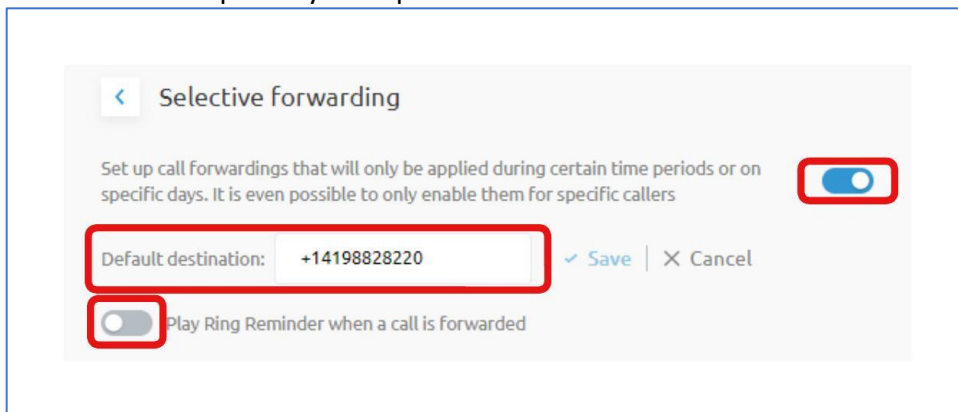
4. **Time Based Rule** – forwarding based on a specific time-based schedule.
    1. To create a Time-Based Rule, select that option and click *Add*
    2. Enter a unique name for the rule.
    3. Choose a schedule from the drop-down list.
        a) Schedules are divided into three categories.

- o *Tennant Schedules* and *Group Schedules* are prepopulated to the list and are not manageable by the end user.
- o *User Schedules* are created by the end user and must be created prior to assigning to this rule. Once the new schedule is created, it will appear in the Time Schedules drop down box under the User Schedules section.
- o Instructions for creating a User Schedule are outlined in the [Schedules](#) section of this guide.

4. Choose the destination phone number the call will be forwarded to.
   - a) *Default* number specified in the main screen.
   - b) Custom number entered in the *Phone number* field.
   - c) *Don't forward* would be used if you have multiple rules running simultaneously and a subsequent rule will create to make exceptions.

5. Designate affected callers.
   - a) To apply rule to all inbound calls, check *Any callers* box.
   - b) Check the *If caller is anonymous/unavailable* check box(es) to enable either of these parameters.
   - c) To add specific phone numbers the rule will apply to click the (+) icon [+]
   - d) Type the desired phone number into the field. Click the (+) icon [+] for each additional number needed.
   - e) Click Add [Add] to complete the rule

6. Any configured Time-based rule can be enabled/disabled, edited, deleted, or viewed by selecting the appropriate icon for that rule
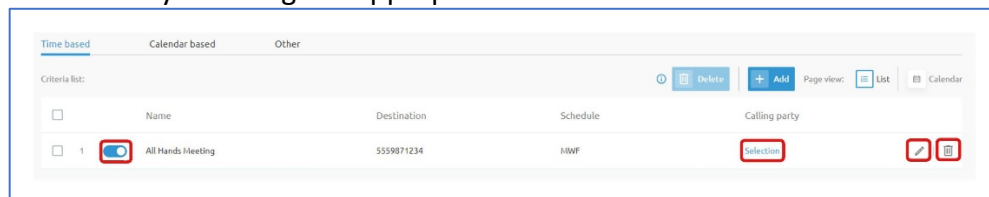
5. **Calendar Based Rule** – forwarding based on a specific calendar-based schedule.
   1. To create a Calendar Based Rule, select that option and click *Add* + Add
   2. Enter a unique name for the rule.
   3. Choose a schedule from the drop-down list.
      a) Holidays are divided into three categories.
         o *Tennant Schedules* and *Group Schedules* are prepopulated to the list and are not manageable by the end user.
         o *User Schedules* are created by the end user and must be created prior to assigning to this rule. Once the new schedule is created, it will appear in the Holiday Schedules drop down box under the User Schedules section.
         o Instructions for creating a User Schedule are outlined in the Schedules section of this guide.
   4. Choose the destination phone number the call will be forwarded to.
      a) *Default* number specified in the main screen.
      b) Custom number entered in the *Phone number* field.
      c) *Don't forward* would be used if you have multiple rules running simultaneously and a subsequent rule will be created to make exceptions.
   5. Designate affected callers.
      a) To apply rule to all inbound calls, check *Any callers* box.
      b) Check the *If caller is anonymous/unavailable* check box(es) to enable either of these parameters.
      c) To add specific phone numbers the rule will apply to click the (+) icon +
      d) Type the desired phone number into the field. Click the (+) icon + for each additional number needed.
   6. Click Add Add to complete the rule.

a) Click the *Add* button to complete the rule

7. Any configured Calendar based rule can be enabled/disabled, edited, deleted, or viewed by selecting the appropriate icon for that rule
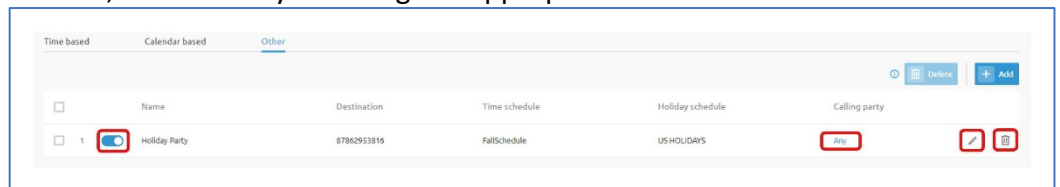
6. **Other Rule** – forwarding based on a specific time and holiday schedule.
    1. To create a time and holiday-based rule, select the *other* option and click *Add* [+ Add]
    2. Enter a unique name for the rule.
    3. Choose a Time schedule from the drop-down list.
        a) Schedules are divided into three categories.
            o *Tennant Schedules* and *Group Schedules* are prepopulated to the list and are not manageable by the end user.
            o *User Schedules* are created by the end user and must be created prior to assigning to this rule. Once the new schedule is created, it will appear in the Time Schedules drop down box under the User Schedules section.
            o Instructions for creating a User Schedule are outlined in the Schedules section of this guide.
    4. Choose a Holiday schedule from the drop-down list.
        a) Holidays are divided into three categories.
            o *Tennant Schedules* and *Group Schedules* are prepopulated to the list and are not manageable by the end user.
            o *User Schedules* are created by the end user and must be created prior to assigning to this rule. Once the new schedule is created, it will appear in the Holiday Schedules drop down box under the User Schedules section.
            o Instructions for creating a User Schedule are outlined in the Schedules section of this guide.
    5. Choose the destination phone number the call will be forwarded to.
        a) *Default* number specified in the main screen.
        b) Custom number entered in the *Phone number* field.
        c) *Don't forward* would be used if you have multiple rules running simultaneously and a subsequent rule will be created to make exceptions.
    6. Designate affected callers.
        a) To apply rule to all inbound calls, check *Any callers* box.
        b) Check the *If caller is anonymous/unavailable* check box(es) to enable either of these parameters.
        c) To add specific phone numbers the rule will apply to click the (+) icon [+]
        d) Type the desired phone number into the field. Click the (+) icon [+] for each additional number needed.

e) Click Add **Add** to complete the rule

7. Any configured Time/Holiday based rule can be enabled/disabled, edited, deleted, or viewed by selecting the appropriate icon for that rule

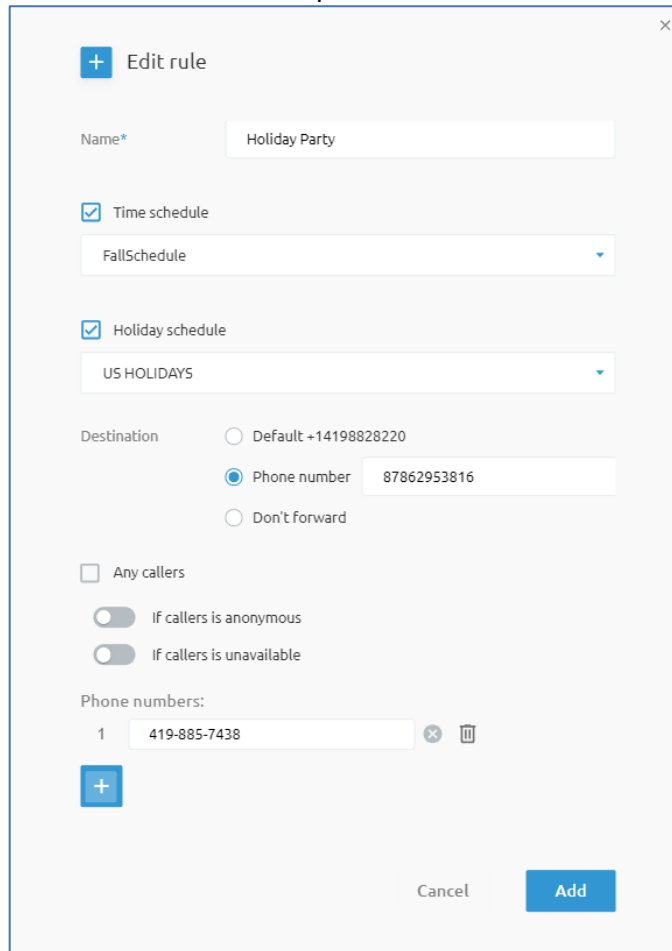- Call Blocking

Call blocking enables you to block a certain number or range of numbers while allowing others through. This can be accomplished through two separate types of filter lists.

The service provides the ability to filter calls through a Blacklist and/or Whitelist function. Blacklist is based on an allow first principle and can be referred to as Selective Call Rejection. Whitelist is based on a deny first principle and can be referred to as Selective Call Acceptance. Either list can be used individually, or both used together to create more advanced call blocking scenarios.

o *Basic Call Blocking*

An example for a basic call blocking scenario would be receiving repetitive spam calls from a certain phone number(s) that you have identified and want to block from reaching your number. Blocking individual phone numbers can be accomplished through either the black- or whitelist.

1. To easily block all anonymous calls from reaching your number, click the ***Permanently block anonymous calls*** radio button at the top of the page.
2. To add individual phone numbers to your block list, choose either the Blacklist or Whitelist section.
3. Once on the desired list, click the Add [+ Add] button
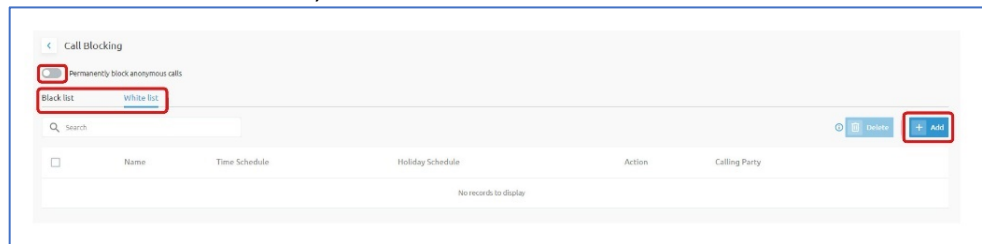
4. Type a unique name for the rule in the *Criterium name* field.
5. Select the *Block* action button, click Next
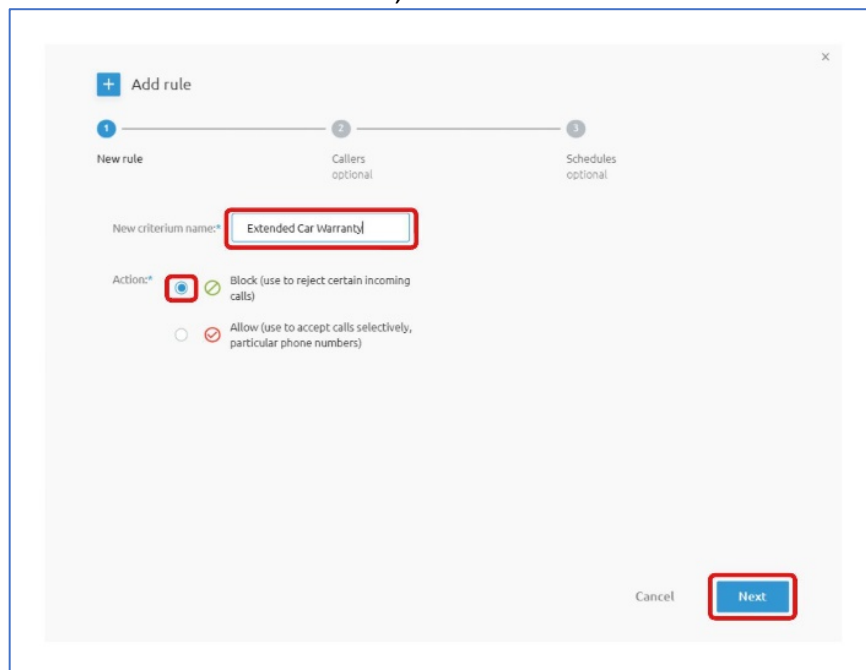
6. On the Callers screen, check the *Apply for specific callers* box.
7. You have the option to include all anonymous and/or unavailable calls to your rule by checking the appropriate box.

8. Add the individual phone number(s) you want to block by entering them in the *Phone numbers* field, then click Next

9. Leave the *Only during specific timeslots/holidays* box unchecked to always block the selected numbers (24/7/365), click the Add button

10. Any configured block number rule can be enabled/disabled, edited, deleted, or viewed by selecting the appropriate icon for that rule

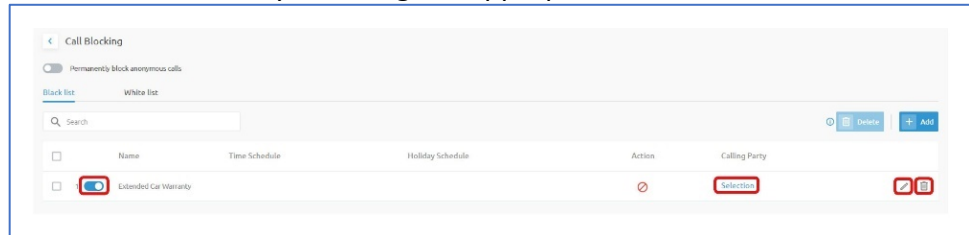- o *Advanced Call Blocking*

An example for an advanced call blocking scenario would be wanting to block a wide range of numbers but allow a certain individual number within that range to reach your phone.

If Acme Inc. has a range of phone numbers that all start with 536-432-**** that you want to block, but you only want to receive calls from Joe Wilson at 536-432-8426, you can specify only Joe's number to allow and block all others from Acme Inc. This is just one example of how advanced call blocking can work but gives the framework of what can be accomplished with this feature.
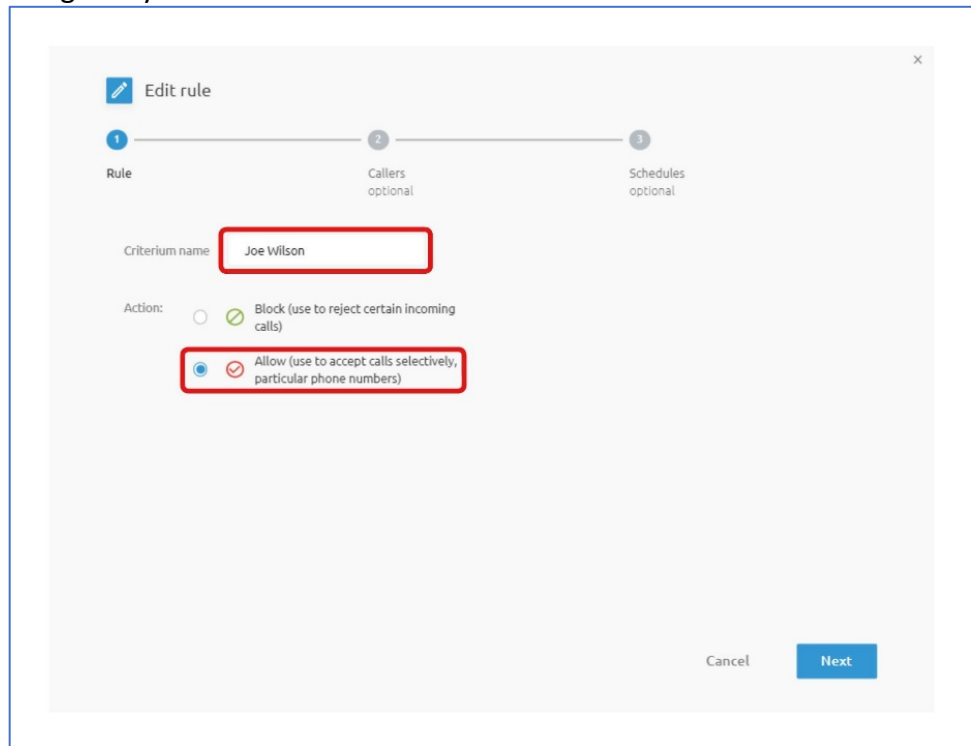
This is just one example of how advanced call blocking features can be utilized. These principles can be applied to various scenarios to achieve the desired result.

1. Using the Acme Inc/Joe Wilson scenario above, select the Blacklist option and click the Add button [+ Add] to create a new rule.
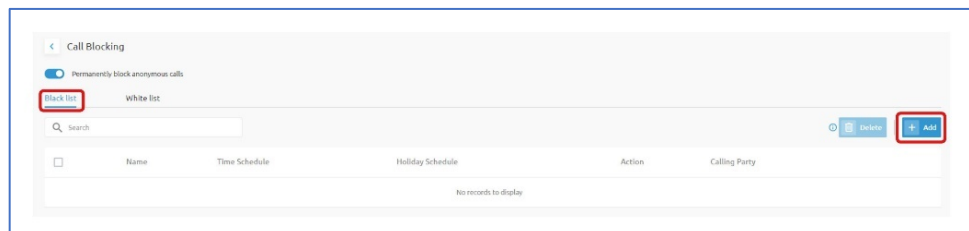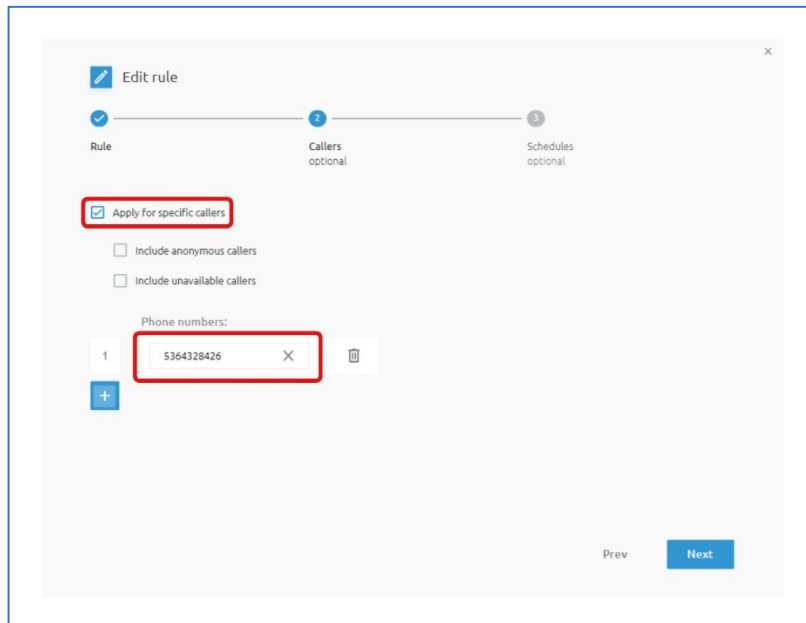
Note: The order in which these rules are created is inconsequential and will not affect how they are executed. All rules listed will be processed by the switch before a call is directed to your phone.

2. Populate the *Criterium name* (Joe Wilson) and select the *Allow* button to designate you want to receive calls from Joe Wilson. Click Next.

3. Check the *Apply for specific callers* box to populate the specific phone number you want to receive calls from
4. Type the exact phone number for Joe Wilson in the field.
5. You have the option to include all anonymous and/or unavailable calls to your rule by checking the appropriate box.
6. Click Next.

7. To apply the rule full time with no exceptions, click *Save* on the Schedules screen.
8. If this rule should only apply to certain dates and times, check the *Only during specific timeslots/holidays* box.

    a. Choose the appropriate Time Schedule from the drop-down menu.
        i. Schedules are divided into three categories.
            1. *Tennant Schedules* and *Group Schedules* are prepopulated to the list and are not manageable by the end user.
            2. *User Schedules* are created by the end user and must be created prior to assigning to this rule. Once the new schedule is created, it will appear in the Time Schedules drop down box under the User Schedules section.
            3. Instructions for creating a User Schedule are outlined in the [Schedules](#) section of this guide.
    b. Choose the appropriate Holiday Schedule from the drop-down menu.
        i. Holidays are divided into three categories.
            1. *Tennant Schedules* and *Group Schedules* are prepopulated to the list and are not manageable by the end user.
            2. *User Schedules* are created by the end user and must be created prior to assigning to this rule. Once the new schedule is created, it will appear in the Holiday Schedules drop down box under the User Schedules section.
            3. Instructions for creating a User Schedule are outlined in the [Schedules](#) section of this guide.

9. Click the *Save* button to complete the rule
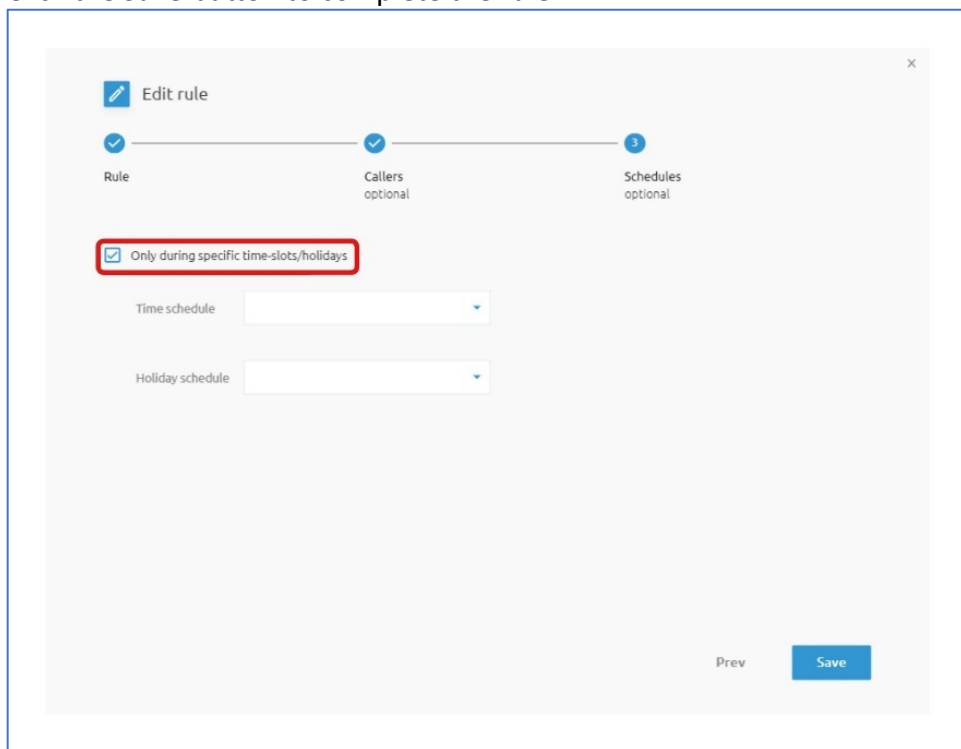
Creating the second rule to block all other numbers coming from Acme Inc. (536-432-****) will follow a very similar process.

10. Select the Blacklist option and click the Add button to create a new rule.
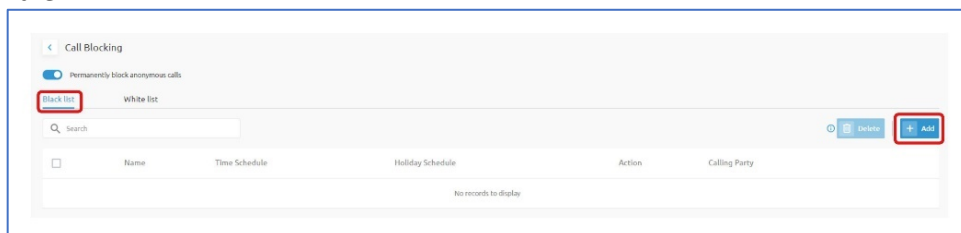
11. Populate the *Criterium name* (Acme Inc) and select the *Block* button to designate you want to block all calls from Acme Inc. Click Next.

12. Check the *Apply for specific callers* box to populate the specific phone number(s) you want to block.
13. You have the option to include all anonymous and/or unavailable calls to your rule by checking the appropriate box.
14. Type 536432* in the *Phone numbers* field to designate that you don't want to receive any calls that begin with 536-432-XXXX. The asterisk acts as a wildcard to designate all possible numbers after 536-432. Click Next.

15. To apply the rule full time with no exceptions, click *Save* on the Schedules screen.
16. If this rule should only apply to certain dates and times, check the *Only during specific timeslots/holidays* box.

    a. Choose the appropriate Time Schedule from the drop-down menu.
        i. Schedules are divided into three categories.
            1. *Tennant Schedules* and *Group Schedules* are prepopulated to the list and are not manageable by the end user.
            2. *User Schedules* are created by the end user and must be created prior to assigning to this rule. Once the new schedule is created, it will appear in the Time Schedules drop down box under the User Schedules section.
            3. Instructions for creating a User Schedule are outlined in the [Schedules](#) section of this guide.
    b. Choose the appropriate Holiday Schedule from the drop-down menu.
        i. Holidays are divided into three categories.
            1. *Tennant Schedules* and *Group Schedules* are prepopulated to the list and are not manageable by the end user.
            2. *User Schedules* are created by the end user and must be created prior to assigning to this rule. Once the new schedule is created, it will appear in the Holiday Schedules drop down box under the User Schedules section.
            3. Instructions for creating a User Schedule are outlined in the [Schedules](#) section of this guide.

17. Click the *Save* button to complete the rule.
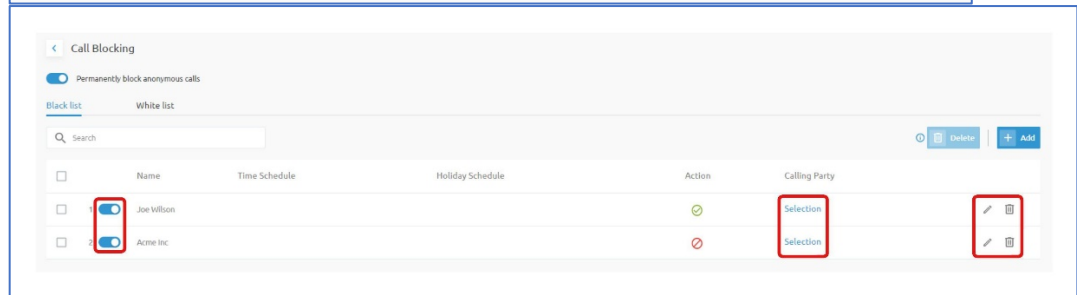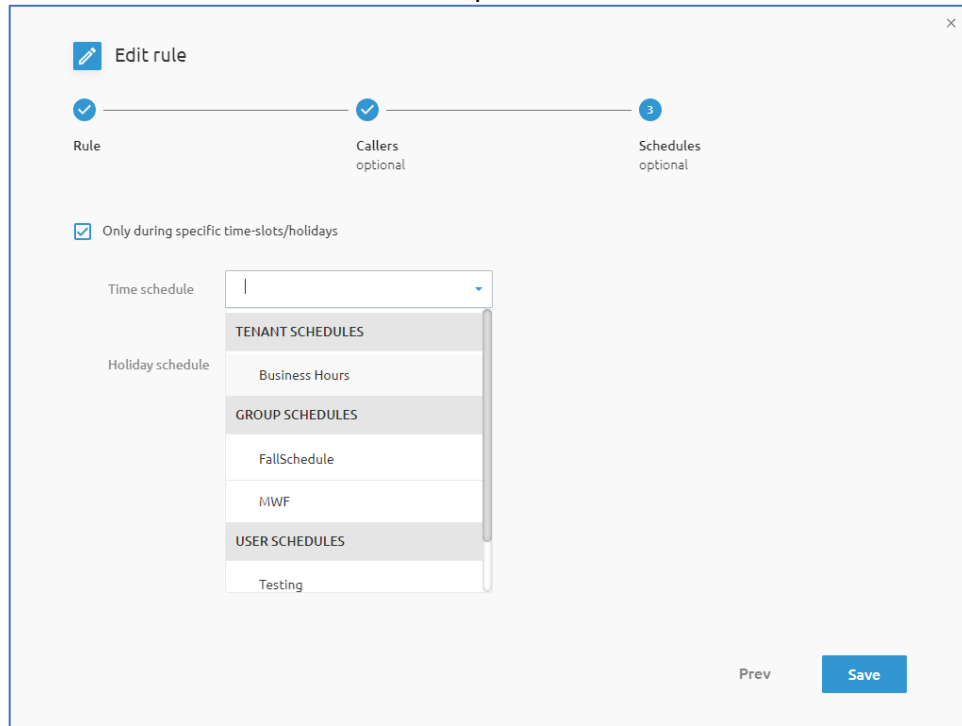
Both rules will appear on the Blacklist screen. Any configured rule can be enabled/disabled, edited, deleted, or viewed by selecting the appropriate icon for that rule.

- Sequential Ringing

Sequential Ring is a "Find me" service that allows you to sequentially ring up to 5 locations, in addition to, the base location for a specified number of rings. The 5 locations can be either a phone number or a SIP-URI.

The feature applies to calls matching your pre-defined criteria. Use this service to ring calls from your manager, a family member, or an important customer on your cell phone, alternate business phone, or home phone.

The criteria for each Sequential Ring entry may be a list of up to 12 phone numbers or digit patterns, a specified time schedule, and a specified holiday schedule. All criteria for an entry

must be satisfied for the call to enter Sequential Ring (phone number and day of week and time of day). If the criteria do not match, the call continues as if this service was not turned on.

If your number is busy, you have the option as to where to, or not to continue the sequential search. If there is no answer, the service tries up to five other locations in sequence until it receives an answer. The call is then connected as usual to the phone that answers. If none of the numbers in the sequence answer, the caller is directed to Voice Mail or to another no answer service.

The caller has the option to terminate the Sequential Ringing service by pushing the "#" key. (The caller hears a comfort message every 20 seconds during the ring sequence and is informed of the # key function.) The call is then immediately forwarded to Voice Mail or other no answer service.

Several services take precedence over the Sequential Ringing service.
Some of these services are:
- Call Forwarding Always
- Call Forwarding Selective
- Selective Call Acceptance
- Selective Call Rejection

If you have activated any of the above services, the call continues as if the Sequential Ringing service was not turned on. Conversely, the Sequential Ringing service takes precedence over the following services, among others:
- Call Forwarding Busy
- Call Forwarding No Answer
- Voice Mail

These services do not start until the Sequential Ringing service is executed.

NOTE: *The number of rings set for the base location is shared with other no answer services such as Voice Mail and Call Forwarding No answer. Changing the number of rings in any one of these services affects the other no answer services as well.*
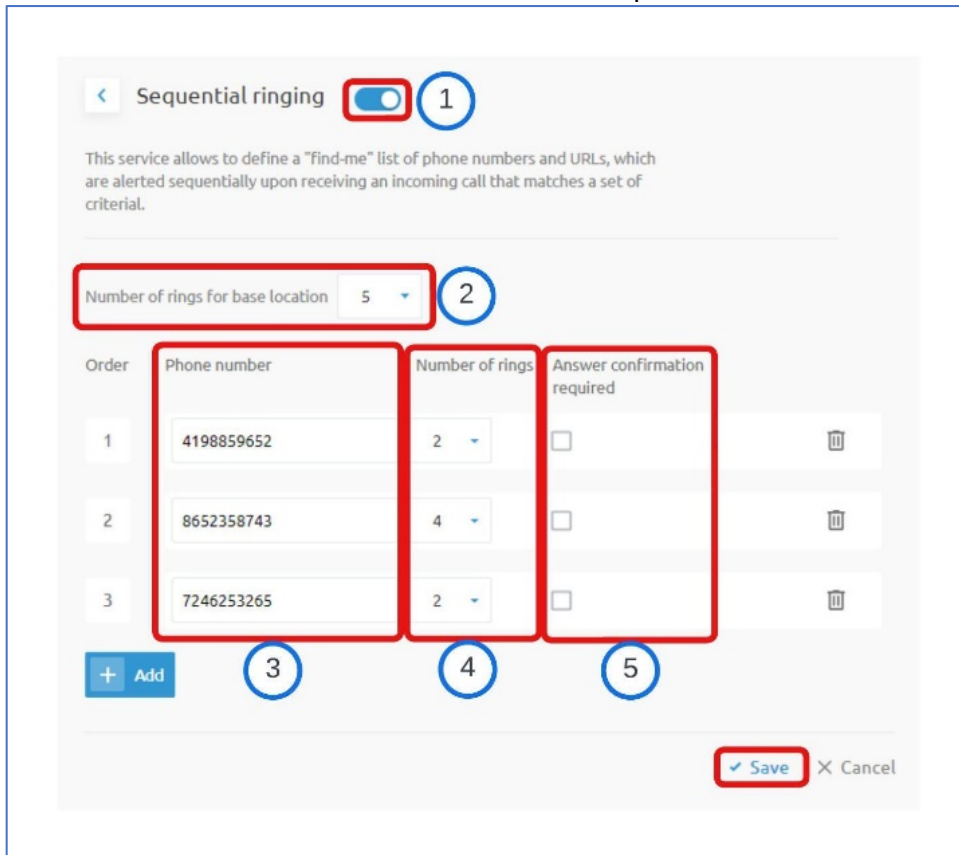
With the Sequential Ring configuration, you may:
- Ring the base location (or not)
- Set the number of rings for the base location.
- Continue the search process, or not, if the base location is busy.
- Allow the caller to terminate the call sequence (or not)
- Enter 1-5 locations (phone numbers or SIP-URI addresses) with an associated number of rings that establish the ring sequence to which calls that activate Sequential Ringing are directed.

- Select pages from which you can add, modify, or delete entries that activate Sequential Ringing service.
- View and activate or deactivate your entries.

The Sequential Ringing service can be configured by following these steps:
1. Enable the Sequential Ringing service by clicking the radio button on the top of the page.
2. Choose the number of rings (between 2-20) from the drop-down menu that your base location will ring before it moves onto the next phone number on the list.
3. Enter up to 5 phone numbers or SIP-URI addresses by clicking the Add button [+ Add] . This will designate where you want the Sequential Ring caller to be directed, <u>in the order in which you want the phone numbers to be rung</u>. You may also enter feature access codes and speed codes, in addition to phone numbers and extensions. A feature access code may also be used as a prefix to a speed code.
4. Select the Number of rings for each number before it proceeds to the next number on the list.
5. Select the Answer confirmation required box if you'd like to set the recipient of the call to press a digit to accept the call.
6. Click the Save button [✓ Save] when the list is complete.

To create a rule set for the Sequential Ringing service, follow these steps:

1. Enable the *Advanced mode* by clicking the radio button ⬤ in the upper right corner of the page.
2. Enter the Criterium name in the text box.
3. Choose the appropriate Action between *Use sequential ringing* and *Don't use sequential ringing* for the rule.
4. Click Next

5. If this rule will apply to all calls, leave the *Apply for specific callers* box unchecked and click Next.
6. Check the box if this rule will apply to certain designated phone numbers.
7. You have the option to include all anonymous and/or unavailable calls to your rule by checking the appropriate box.
8. Enter the phone number(s) in the field.

9. Click Next

10. If this rule should only apply to certain dates and times, check the *Only during specific timeslots/holidays* box.

   a. Choose the appropriate Time Schedule from the drop-down menu.
      i. Schedules are divided into three categories.
         1. *Tennant Schedules* and *Group Schedules* are prepopulated to the list and are not manageable by the end user.
         2. *User Schedules* are created by the end user and must be created prior to assigning to this rule. Once the new schedule is created, it will appear in the Time Schedules drop down box under the User Schedules section.
         3. Instructions for creating a User Schedule are outlined in the Schedules section of this guide.
   b. Choose the appropriate Holiday Schedule from the drop-down menu.
      i. Holidays are divided into three categories.
         1. *Tennant Schedules* and *Group Schedules* are prepopulated to the list and are not manageable by the end user.
         2. *User Schedules* are created by the end user and must be created prior to assigning to this rule. Once the new schedule is created, it will appear in the Holiday Schedules drop down box under the User Schedules section.
         3. Instructions for creating a User Schedule are outlined in the Schedules section of this guide.

11. Click the *Save* button to complete the rule
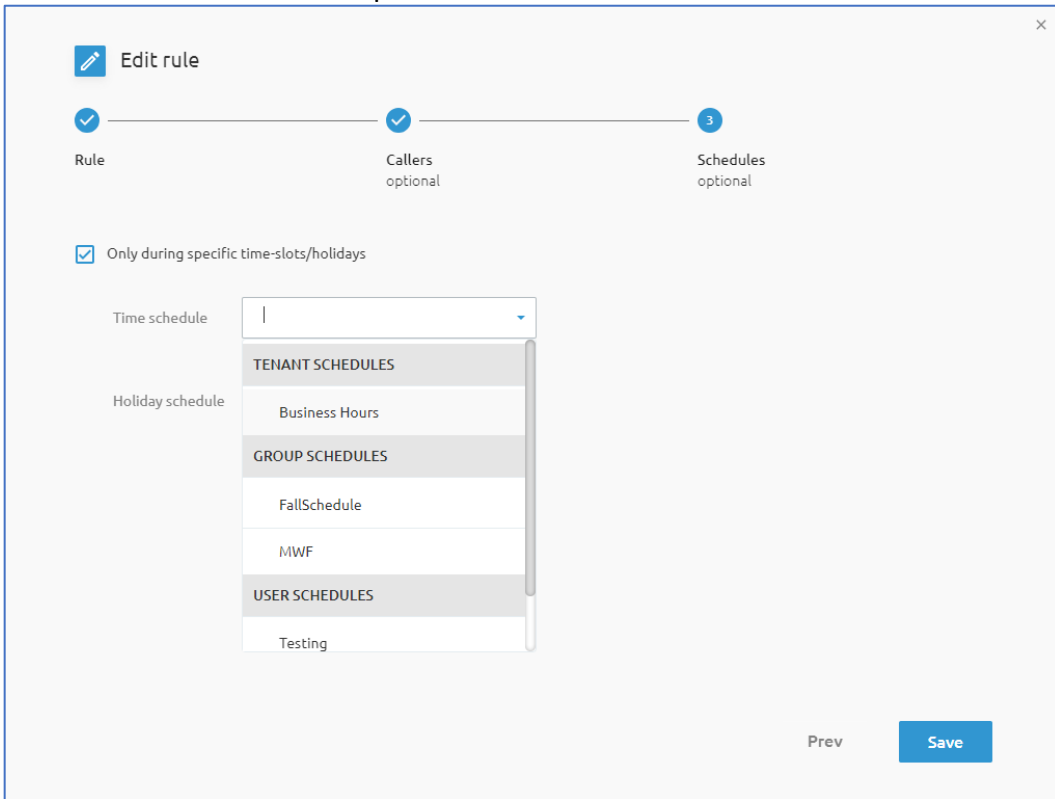
12. Any configured rule can be enabled/disabled, edited, deleted, or viewed by selecting the appropriate icon for that rule
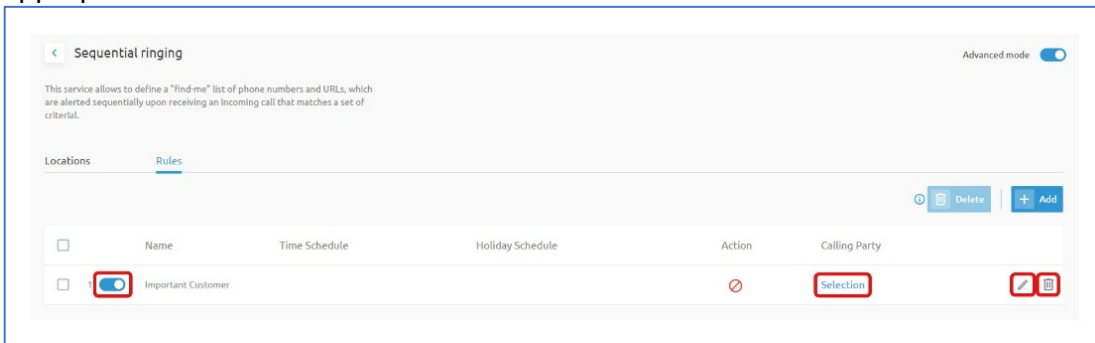
- Calling ID Presentation

This service allows configuring whether the number (calling line ID) of a caller is presented when a call is received. This process only applies to calls received. Disabling your Caller ID for outbound calls is controlled by the "Hide my number" button on the dashboard.

- **When a colleague call me (internal)** – disable this feature if you do not want to see the calling line ID for any internal call within your company.
- **When somebody outside my company calls (external)** - disable this feature if you do not want to see the calling line ID for any external call outside your company
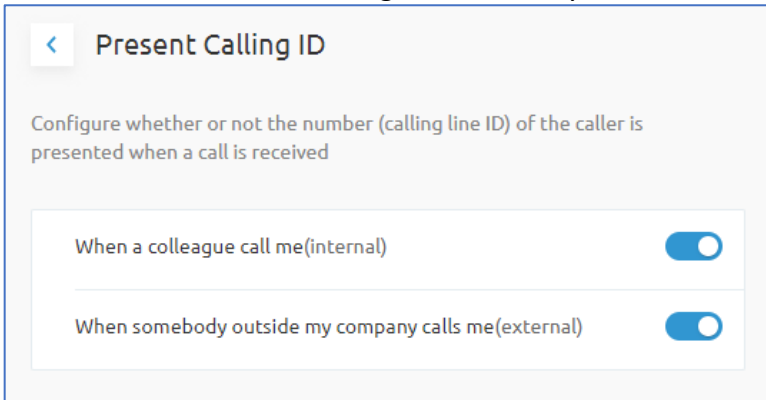
- Call Notify

Call Notify allows you to send a notification email containing the caller's name and number (if available) when the call matches your pre-defined criteria. Use this to create an archive of callers or to determine if you missed any important calls. The criteria for each Call Notify entry can be a list of up to twelve phone number or digit patterns, a specified time schedule, and a specified holiday schedule. All criteria for an entry must be true for an email to be sent (phone number and day of week and time of day).

1. Enter the email address you want the notification sent to. Click Save.
2. Rules can be created to only trigger this email notice on certain days, hours or for specific callers.
3. To create the rule set for the email notice, click the *Advanced Mode* radio button in the upper right corner of the screen
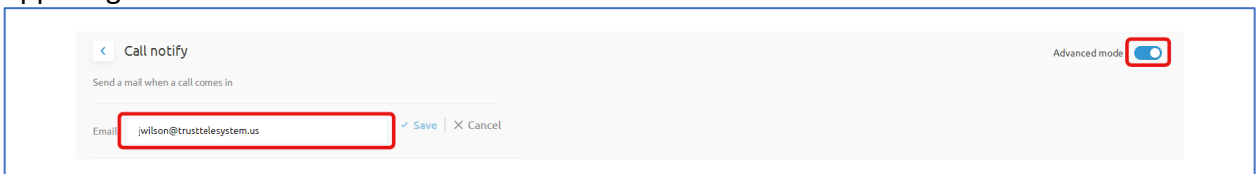
4. Enter a unique *New criterium name* in the text field.

5. Choose the Action for the rule between *Notify* or Don't *Notify* with an email. Click Next.
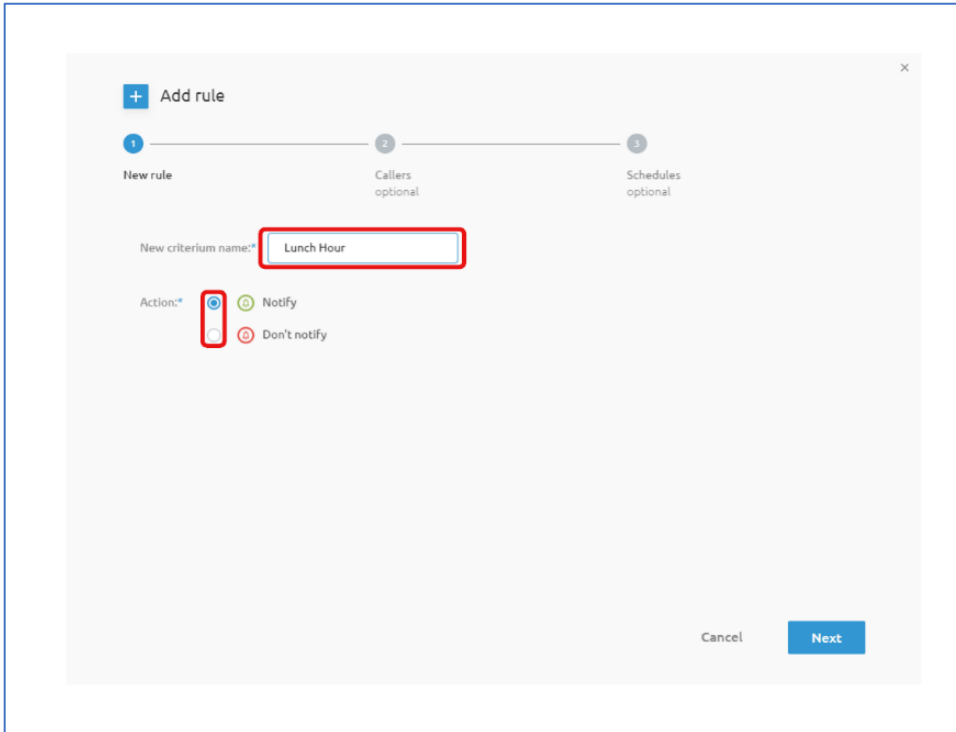
6. Populate the **Callers** screen to designate the phone numbers that will trigger this email.
   a. To apply to all inbound calls, just click *Next.*
   b. To specify certain callers that will trigger the email, check the *Apply for specific callers* box.
   c. Check the *Include anonymous/unavailable callers* check box(es) to enable either of these parameters.
   d. To add specific phone numbers, click the (+) icon
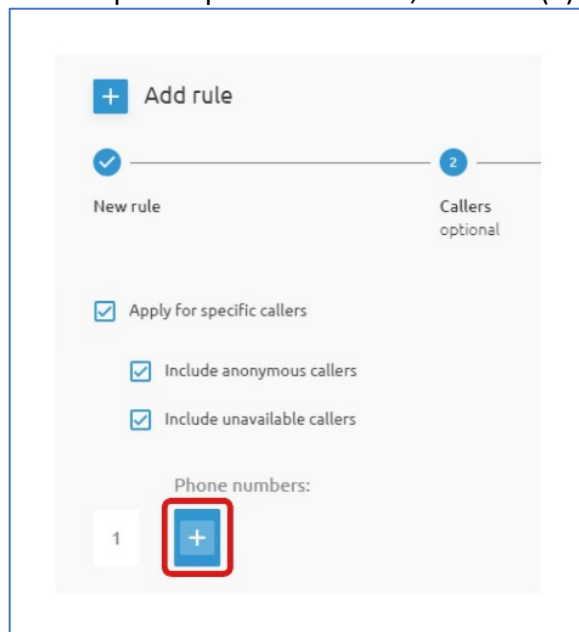
e. Type the desired phone number into the field. Click the (+) icon for each additional number needed.

f. Click *Next* when all the phone numbers have been added

7. Populate the **Schedules** screen to add the specific schedules you would like the email to be sent.

a. To designate the call notification email be always sent, click *Add.*

b. To apply a specific schedule to the email notification, check the *Only during specific timeslots/holidays* box

c. Choose the appropriate Time Schedule from the drop-down menu

i. Schedules are divided into three categories.
1. *Tennant Schedules* and *Group Schedules* are prepopulated to the list and are not manageable by the end user.
2. *User Schedules* are created by the end user and must be created prior to assigning to this rule. Once the new schedule is created, it will appear in the Time Schedules drop down box under the User Schedules section.
3. Instructions for creating a User Schedule are outlined in the Schedules section of this guide.

d. Choose the appropriate Holiday Schedule from the drop-down menu

 i. Holidays are divided into three categories.
  1. *Tennant Schedules* and *Group Schedules* are prepopulated to the list and are not manageable by the end user.
  2. *User Schedules* are created by the end user and must be created prior to assigning to this rule. Once the new schedule is created, it will appear in the Holiday Schedules drop down box under the User Schedules section.
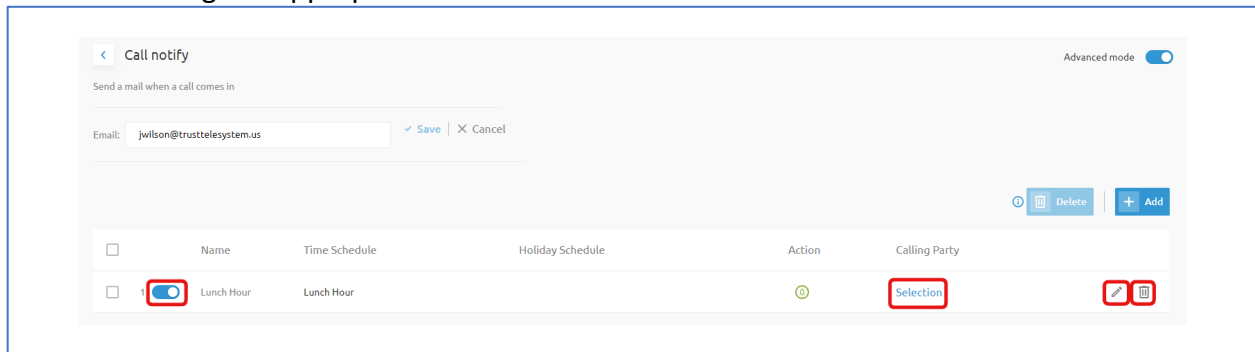 3. Instructions for creating a User Schedule are outlined in the Schedules section of this guide.
e. Click the *Add* button to complete the rule.

8. Any configured schedule can be enabled/disabled, edited, deleted, or viewed by selecting the appropriate icon for that schedule.

- Simultaneous Ringing

Simultaneous Ringing allows you to list phone numbers or SIP-URI addresses you would like to ring, in addition to, your primary phone when you receive a call. This feature is helpful when you're not at your phone, but you would like your cell phone to ring when you get a call.

You may enter up to ten other phone numbers, extensions, or SIP-URI addresses. The incoming call rings to all of the numbers on your list (for this service), as long as the lines are not busy. The call is answered by the user (at that number) who picks up first.

You may enter any complete phone number, extension, or SIP-URI address that is allowed in your Outgoing Calling Plan. Once a phone number is added, you cannot modify a phone number or SIP-URI address on the list. It must be deleted, then added again.

If you enter a mobile number that has voice mail service, you must set the number of rings (before the mobile voice mail service answers) for more than three rings. Some mobile phones have slower location and connection services which may delay the simultaneous ringing of the mobile phone before the voice mail service answers.

The operation of the service may be affected by other services such as Call Forwarding Always, Call Forwarding Busy, Call Forwarding No Answer, Call Forwarding Selective, and Voice Messaging.

Warning: *If your cell phone or other phone you've selected has voice mail that picks up before your office voice mail picks up, your messages could be on your cell phone's voice mail.*

To enable the Simultaneous Ringing service, perform the following steps:
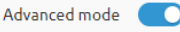1. Activate the Simultaneous Ringing service by sliding the radio button at the top of the page. One phone number needs to be added before the service can be activated.
2. **Do not ring if user is on call** – check this box if you want to disable the phone from ringing during a Simultaneous Ring if the user is on an active call.
3. Add any phone numbers you want included in the Simultaneous ring group.

a. Click the Add button + Add to include any additional numbers.
b. **Answer confirmation confirmed** – check If you'd like an answer confirmation message to play when an incoming call in presented.
c. Click the *Save* button after each phone number is added.
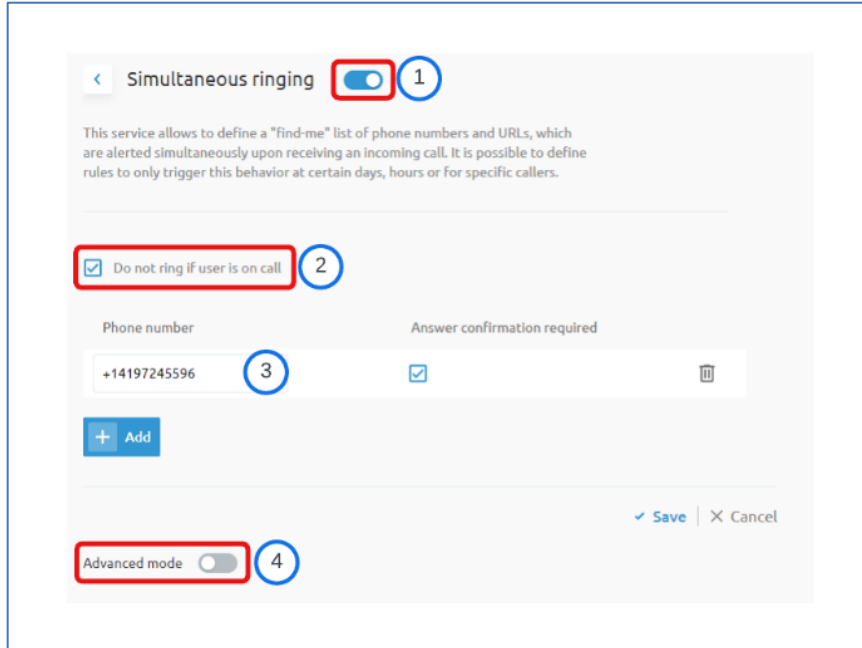
4. Rules can be created to only trigger this behavior at certain days, hours or for specific callers.
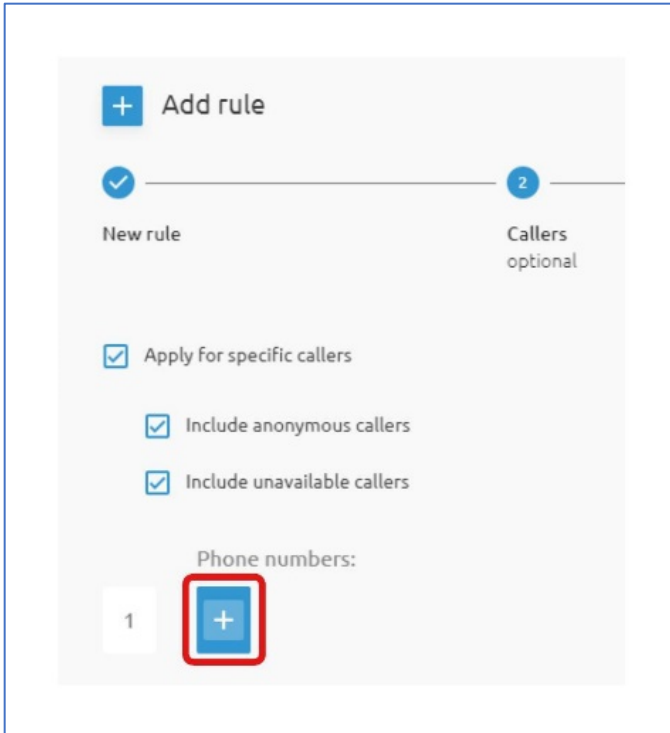
To create a rule set for the Sequential Ringing service, follow these steps:

1. Enable the *Advanced mode* by clicking the radio button Advanced mode 🔵 in the middle of the page.
2. Populate the Rule screen.
   • Enter a unique New criterium name in the text field.

- Choose the Action for the rule between *Use simultaneous ringing* or *Don't Use simultaneous ringing*. Click Next

3. Populate the **Callers** screen to designate the phone numbers that will apply to this rule.
   - To apply to all calls, just click *Next.*
   - To specify certain callers that this rule will apply to check the *Apply for specific callers* box.
   - Check the *Include anonymous/unavailable callers* check box(es) to enable either of these parameters.
   - To add specific phone numbers, click the (+) icon

- Type the desired phone number into the field. Click the (+) icon for each additional number needed.
- Click Next when all the phone numbers have been added

4. Populate the **Schedules** screen to add the specific schedules you would like this rule to be applied to
   a) To designate the Sequential Ringing service be always activated, click *Add.*
   b) To apply a specific schedule to the service, check the *Only during specific timeslots/holidays* box.

c) Choose the appropriate Time Schedule from the drop-down menu

    i.   Schedules are divided into three categories.
- *Tennant Schedules* and *Group Schedules* are prepopulated to the list and are not manageable by the end user.
- *User Schedules* are created by the end user and must be created prior to assigning to this rule. Once the new schedule is created, it will appear in the Time Schedules drop down box under the User Schedules section.
- Instructions for creating a User Schedule are outlined in the Schedules section of this guide.

d) Choose the appropriate Holiday Schedule from the drop-down menu

i. Holidays are divided into three categories.
- *Tennant Schedules* and *Group Schedules* are prepopulated to the list and are not manageable by the end user.
- *User Schedules* are created by the end user and must be created prior to assigning to this rule. Once the new schedule is created, it will appear in the Holiday Schedules drop down box under the User Schedules section.
- Instructions for creating a User Schedule are outlined in the Schedules section of this guide.

e) Click the *Save* button to complete the rule.

Any configured schedule can be enabled/disabled, edited, deleted, or viewed by selecting the appropriate icon for that schedule
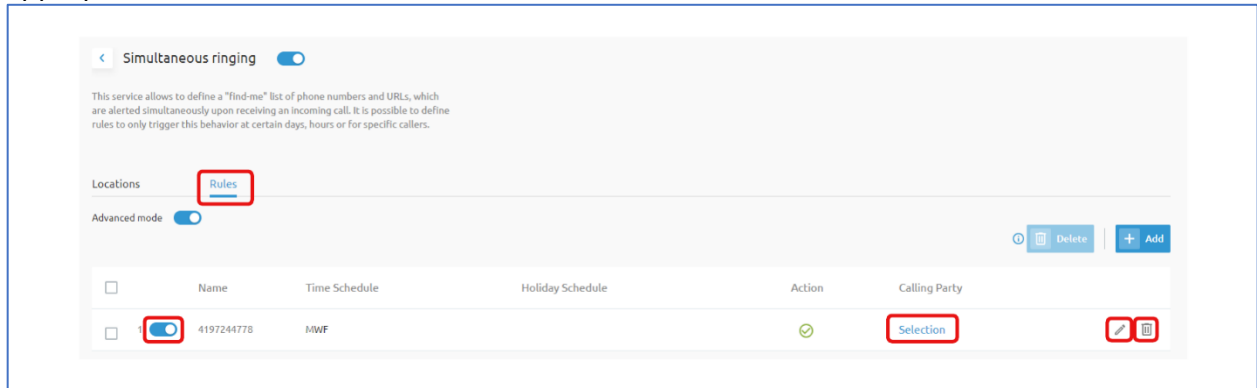
- Priority Alert

This feature allows you to add a priority alert entry and specify a time schedule and/or holiday schedule you would like a priority alert to occur. You may also set a priority alert when only specified numbers call or when all external numbers call.

To enable the Priority Alert feature, rules must be created to trigger the feature at certain days, hours or for specific callers.

To create a rule set for the Priority Alert service, follow these steps:

1. Click the Add button on the right side of the screen.
2. Populate the Rule screen.
   - Enter a unique new rule name in the text field.
   - Choose the Action for the rule between *Use priority alert* or *Don't Use priority alert*. Click Next
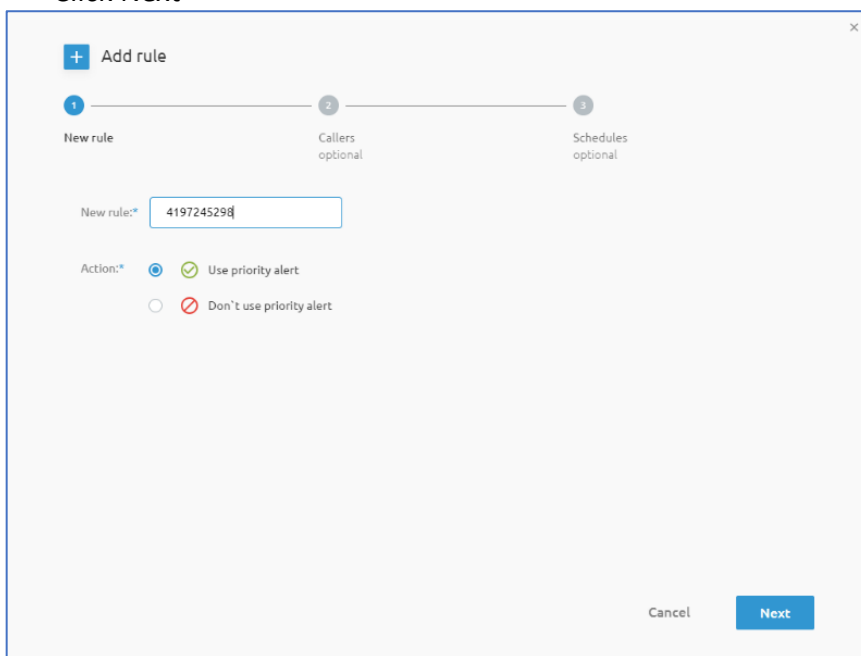
3. Populate the **Callers** screen to designate the phone numbers that will apply to this rule.
   - To apply to all calls, just click *Next.*
   - To specify certain callers that this rule will apply to check the *Apply for specific callers* box.
   - Check the *Include anonymous/unavailable callers* check box(es) to enable either of these parameters.
   - To add specific phone numbers, click the (+) icon
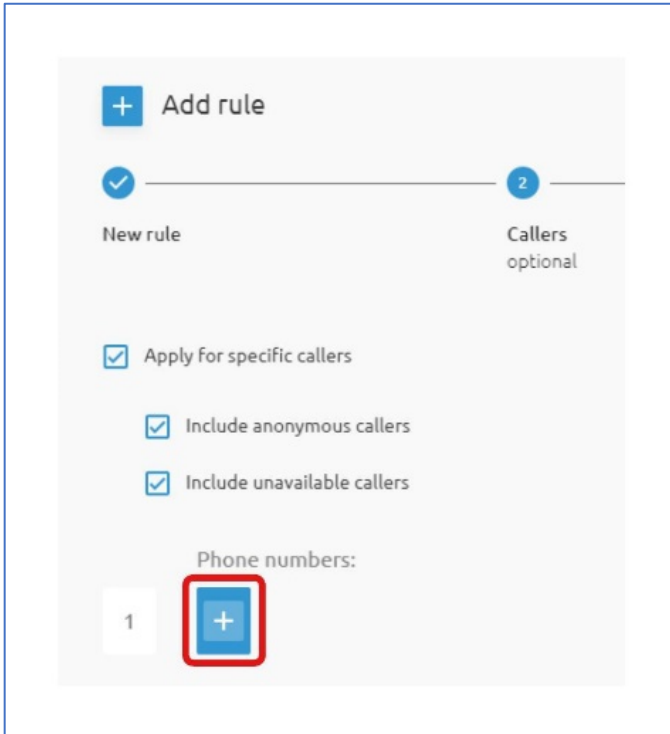
   - Type the desired phone number into the field. Click the (+) icon for each additional number needed.
   - Click Next when all the phone numbers have been added

4. Populate the **Schedules** screen to add the specific schedules you would like the email to be sent.

    f) To designate the call notification email be always sent, click *Add.*

    g) To apply a specific schedule to the email notification, check the *Only during specific timeslots/holidays* box.
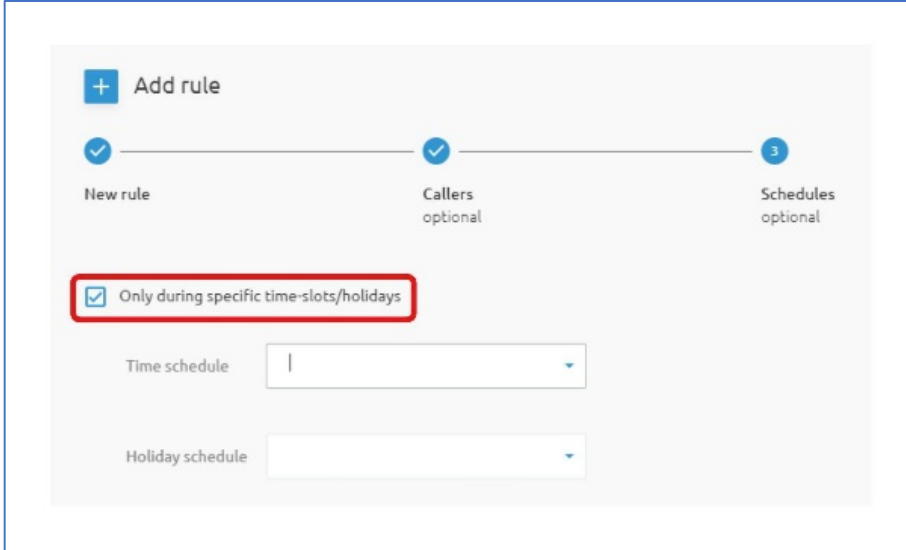
    h) Choose the appropriate Time Schedule from the drop-down menu
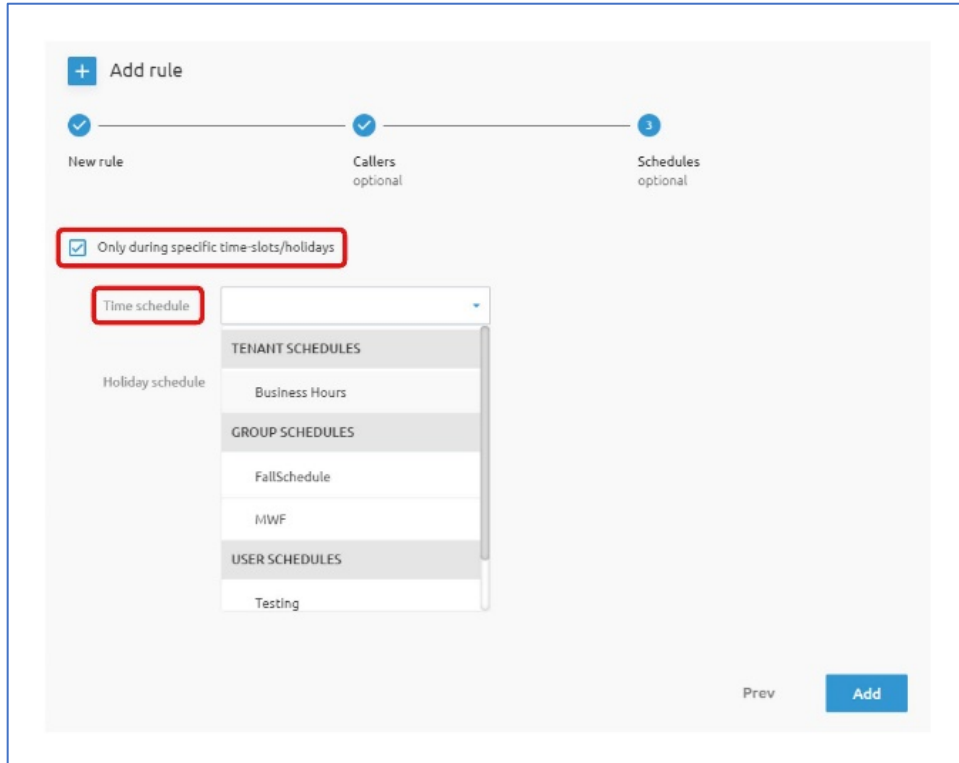
    i. Schedules are divided into three categories.
        - *Tennant Schedules* and *Group Schedules* are prepopulated to the list and are not manageable by the end user.

- *User Schedules* are created by the end user and must be created prior to assigning to this rule. Once the new schedule is created, it will appear in the Time Schedules drop down box under the User Schedules section.
- Instructions for creating a User Schedule are outlined in the Schedules section of this guide.

i) Choose the appropriate Holiday Schedule from the drop-down menu

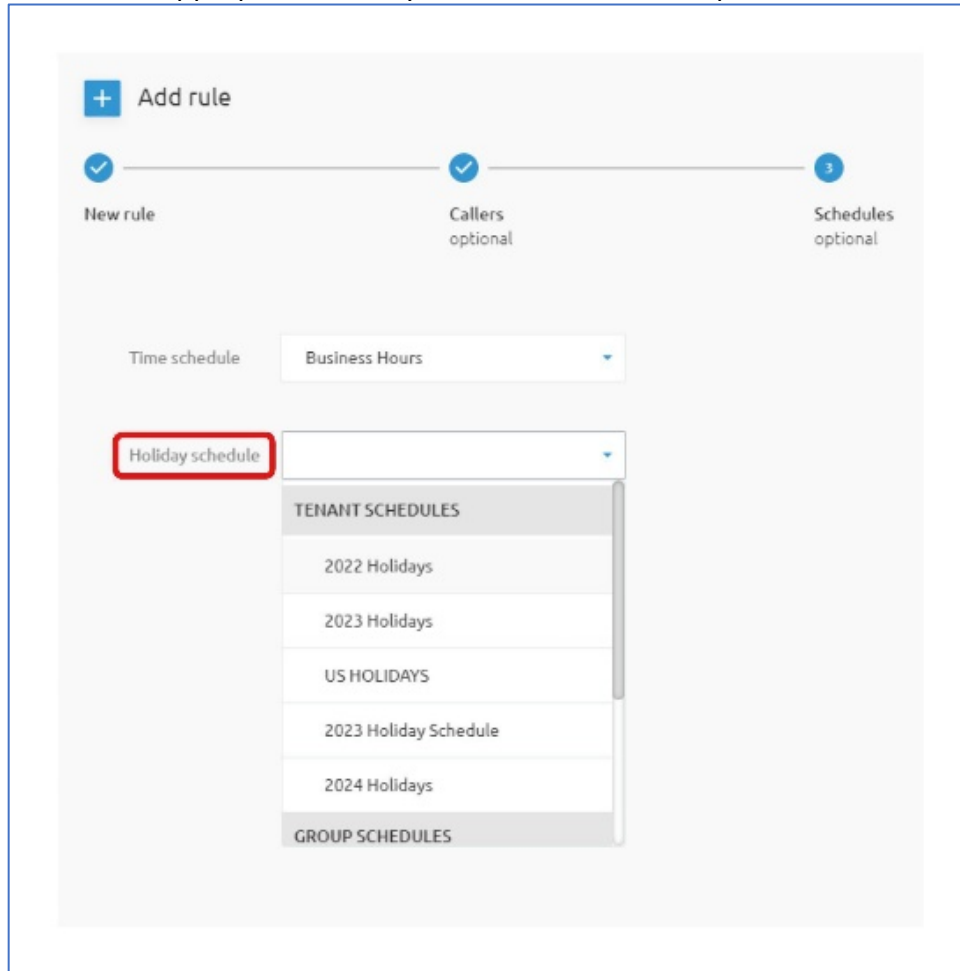i. Holidays are divided into three categories.
- *Tennant Schedules* and *Group Schedules* are prepopulated to the list and are not manageable by the end user.
- *User Schedules* are created by the end user and must be created prior to assigning to this rule. Once the new schedule is created, it will appear in the Holiday Schedules drop down box under the User Schedules section.
- Instructions for creating a User Schedule are outlined in the Schedules section of this guide.

j) Click the *Save* button to complete the rule.

Any configured schedule can be enabled/disabled, edited, deleted, or viewed by selecting the appropriate icon for that schedule
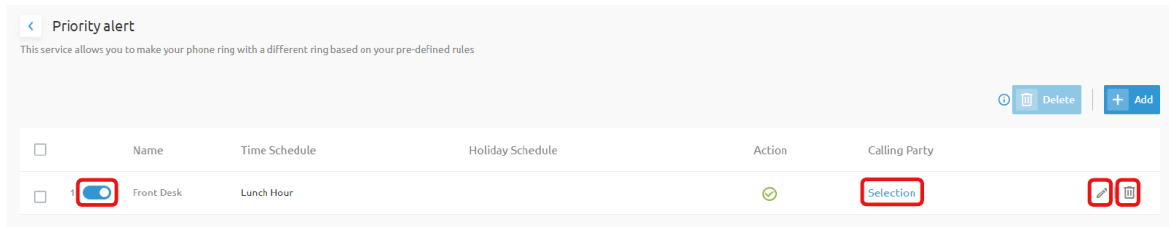
- Push To Talk

This service provides intercom functionality. Push to Talk allows people to call each other and have the call answered automatically, either as a one-way call or two-way call.

These settings allow you to determine whether other users can reach you via a push-to-talk or intercom call. Push to talk calls are answered automatically. If desired, you can configure how may or may not reach you in this way.

To use the Push to Talk feature on your telephone, dial * followed by the two-digit feature access code that has been assigned for this service. Then enter the number you wish to call.

The connection type, between One-way and Two-way calls, can be configured in the Push to talk section under Outgoing calls.

Configure the following settings for the Push to talk feature:
- Slide the Auto Answer radio button [Auto answer ⬤] on if you want to automatically answer Push to talk calls.
- Create the exception list for callers you wish to block or accept from incoming push to talk calls.
   o Select the appropriate designation for whether you want to block or allow all incoming push to talk calls except numbers listed in the custom table

   o Click the Add button [+ Add] to designate the phone numbers you wish to exclude from the push to talk feature

o Select users from the list on the left to assign and they will appear on the selected list on the right. Click Add.

o Once the exception list has been created, toggling the Block/Accept buttons will update the list accordingly.

- **Custom Ringback**

This service allows to configure a specific ringback tone for all inbound calls, or with certain rules applied.

Configure the following settings for the custom ringback feature:
- To enable the Custom Ringback feature, slide the radio button at the top of the page
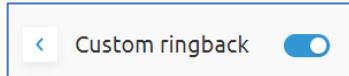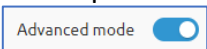
- To select the ringback announcement file, arrow down the *Normal Ringback* section
  - To choose the default announcement provided by your organization, select the *System* option.
  - To choose a custom announcement, select the *Custom* option.
    - Custom audio files are created/managed in the Media section of the portal. Audio files (announcements) must be present in the Media section before they will appear on the custom audio files drop down list in this section.
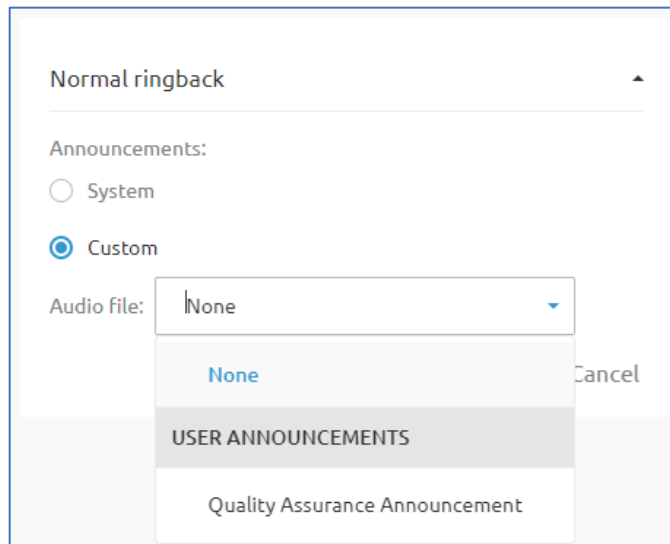
  - Pick the desired custom audio file and click *Save*.

Rules can be created to only trigger this behavior at certain days, hours or for specific callers. To create a rule set for the Sequential Ringing service, follow these steps:
1. Enable the *Advanced mode* by clicking the radio button in the middle of the page.
2. Populate the Rule screen.
   a) Enter a unique New criterium name in the text field.
   b) Choose the Action for the rule between *Play Announcement* or *Don't Play Announcement*. Click Next
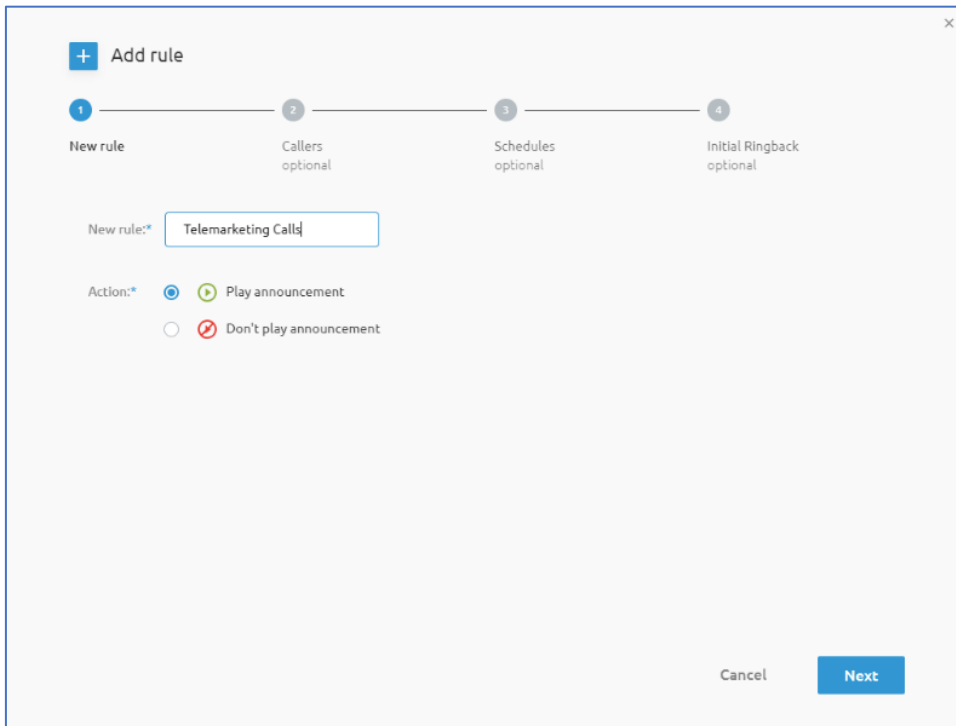
3. Populate the **Callers** screen to designate the phone numbers that will hear the announcement.
   a) To apply to all inbound calls, just click *Next.*
   b) To specify certain callers that will hear the announcement, check the *Apply for specific callers* box.
   c) Check the Include anonymous/unavailable callers check box(es) to enable either of these parameters.
   d) To add specific phone numbers, click the (+) icon

e) Type the desired phone number into the field. Click the (+) iconfor each additional number needed.

f) Click Next when all the phone numbers have been added

4. Populate the **Schedules** screen to add the specific schedules you would like the email to be sent.
   a) To designate the call notification email be always sent, click *Add.*
   b) To apply a specific schedule to the email notification, check the *Only during specific timeslots/holidays* box.

c) Choose the appropriate Time Schedule from the drop-down menu

    i.   Schedules are divided into three categories.
- *Tennant Schedules* and *Group Schedules* are prepopulated to the list and are not manageable by the end user.
- *User Schedules* are created by the end user and must be created prior to assigning to this rule. Once the new schedule is created, it will appear in the Time Schedules drop down box under the User Schedules section.
- Instructions for creating a User Schedule are outlined in the Schedules section of this guide.

b) Choose the appropriate Holiday Schedule from the drop-down menu

> i. Holidays are divided into three categories.
>> • *Tennant Schedules* and *Group Schedules* are prepopulated to the list and are not manageable by the end user.
>> • *User Schedules* are created by the end user and must be created prior to assigning to this rule. Once the new schedule is created, it will appear in the Holiday Schedules drop down box under the User Schedules section.
>> • Instructions for creating a User Schedule are outlined in the Schedules section of this guide.

5. Populate the **Initial Ringback** screen to designate which audio file will be applied to the rule.

a) If no personal ringback announcement is desired, choose that selection

b) To select a personal ringback file, choose the second option.

Any configured schedule can be enabled/disabled, edited, deleted, or viewed by selecting the appropriate icon for that schedule

Outgoing Calls

This section allows you to view/configure your outgoing call features. You can view your calling plan features and the Push to talk connection type.

- Settings

Enable/disable the **Hide my number** feature which allows you to block your phone number for outbound calls.

Outgoing calls

Settings	Calling plan	Push to talk

Hide my number

- Calling Plan

Outgoing calling plan allows you to view the calling plan rules for outgoing calls. Only an administrator can change which call types are permitted.
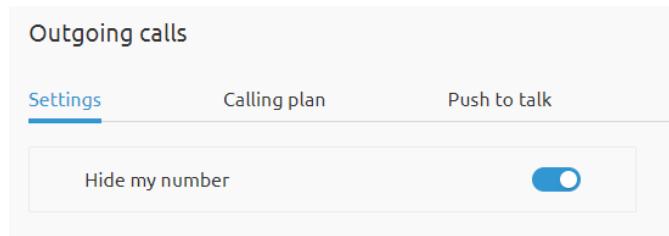
Outgoing calls

Calling plan	Push to talk

Outgoing calling plan allows to view the calling plan rules for outgoing calls. Only an administrator can change which call types are permitted.

	Name	Originating	Redirecting
1	Intern	Allow	Allow
2	Local	Allow	Allow
3	Toll Free	Allow	Allow
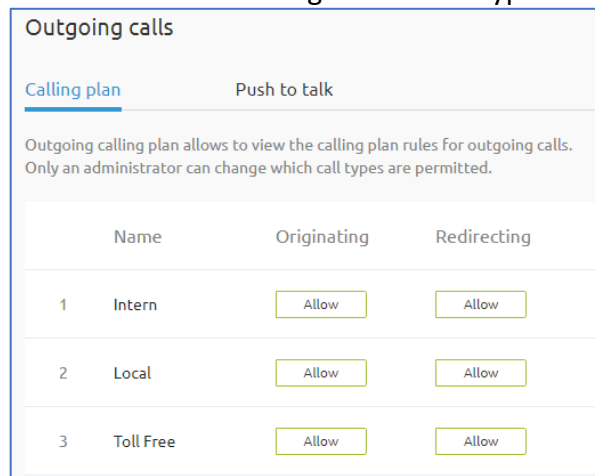
- Push to Talk

There are two options for the type of connection the Push to talk service will use.

- **One-way** – If this option is selected, then the originator of the call can talk to the party received the call, but the party receiving the call cannot talk to the originator of the call.
- **Two-way** - If this option is selected, both the originator of the call and the party receiving the call can talk to each other.

Outgoing calls

Calling plan	Push to talk

This service provides intercom functionality. To make an intercom call, you must enter the appropriate function code, followed by the number or extension of the user you wish to reach. The chosen extension will be prompted to answer the call automatically. Please note that the recipient may have disabled this functionality

You will find more settings under 'Outgoing calls'

Connection type:

○ One-way

◉ Two-way

Devices

This option is only displayed when Show Advanced Features is enabled. This section displays any shared line appearances configured for your User ID such as Telesystem Softphone for your mobile phone or personal computer.

- SIP Phones

The first tab gives an overview of the devices that are used by your account. It can be a physical phone or a Webex softphone application on a PC (desktop or laptop) or a Webex softphone application on a mobile device. Details about the type of phone, device name, mac address are displayed on this page.

The main device is listed first on the screen. This widget displays information such as Device type, Device name, MAC address, and ports number. When selecting the "More →" option at the bottom of your SIP Phones device, you will be able to configure your line-keys of the physical phone. Depending on how your IT administrator has defined the standard setup of the line keys, some keys cannot be changed. This section also contains an Additional lines tab that will show additional (phone) lines from colleagues which you could have configured. Perhaps you also want to see incoming calls to a colleague and answer those calls.
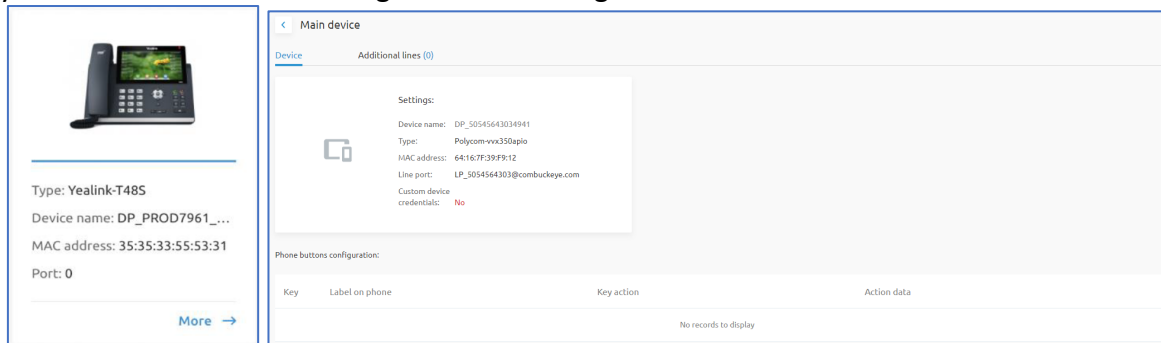
The **Additional devices** section displays any shared line appearances configured for your User ID such as Telesystem Softphone for your mobile phone or personal computer.
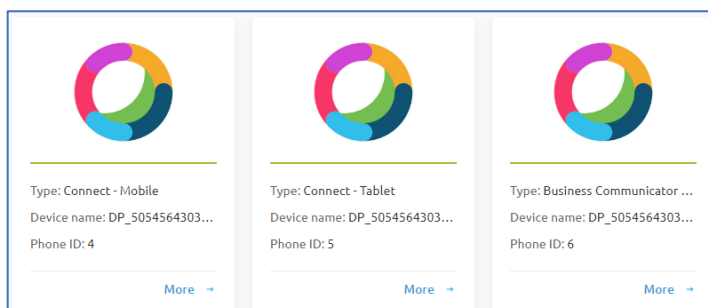
When selecting the "**More →**" function at each of the devices, more detailed configuration is possible. This section will allow you to perform the following functions for each additional device and is specific for this individual device:

- Deassign – permanently remove this device assignment from your account.

- Device activate/deactivate.
- Allow incoming calls.
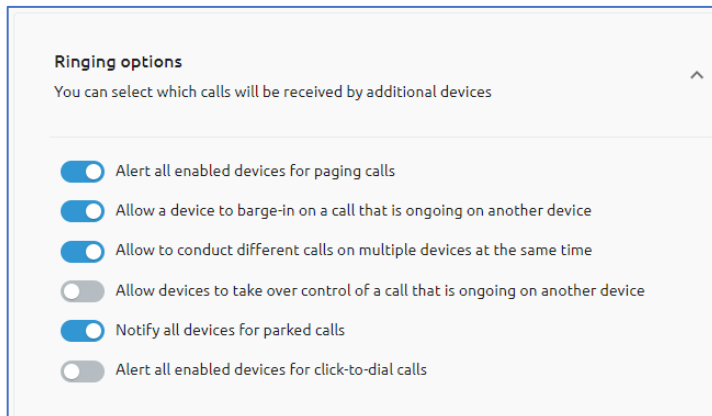- Allow outgoing calls.
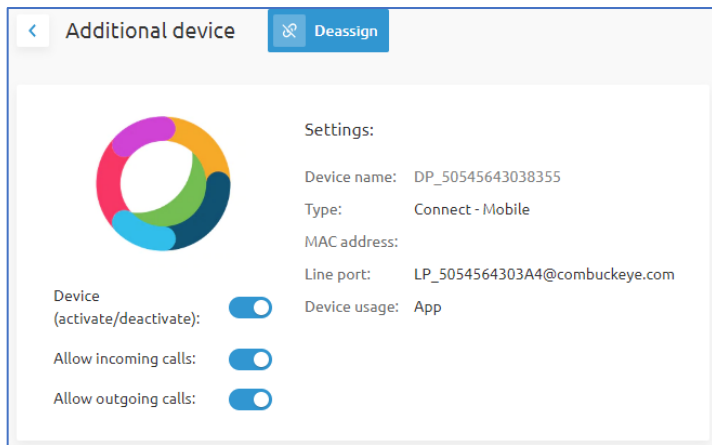
The **Ringing Options** section allows configuring the call control capabilities for the additional devices listed. You can select which calls will be received by additional devices.


- Flexible Seat

Flexible Seat allows users to associate their service profiles with devices other than their own. This service may be used, for example, with transient employees or an enterprise with a visitor's office and phone. The user account associated with this phone would have the Flexible Seat (Hoteling Host) service assigned. A salesperson, with the Flexible Seat (Hoteling Guest) service assigned, can associate their service profile with the phone in the visitor's office.

Flexible Seat consists of two separate services, ***Share my device*** and ***Use the device of a colleague***. *Share my device* is used to designate a particular user as a host, allowing other users with the Hoteling Guest service to associate their service profile with the Host user's device. *Use the device of a colleague* is used to allow a Hoteling Guest user to associate their service profile with a Hoteling Host user's device.

- **Share my device** - Allows user to designate a particular user account to be a host and allow users with the hoteling guest service to associate their service profile with this account's device.
- **Use the device of a colleague** - Allows to associate with a hoteling host account and use the Hoteling Host account's device with their service profile.
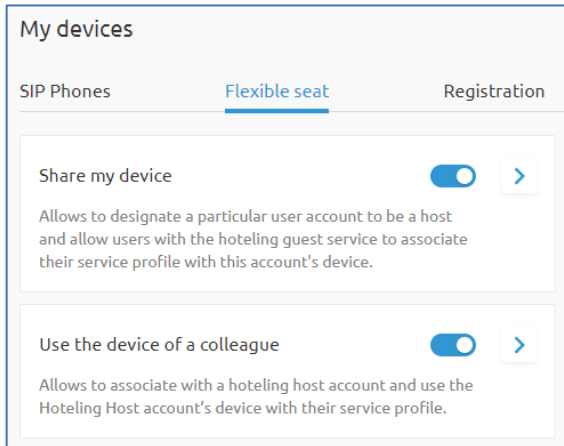
- Registration

In the registration tab, you can find more information about the registration of your device. This can be useful for support reasons.
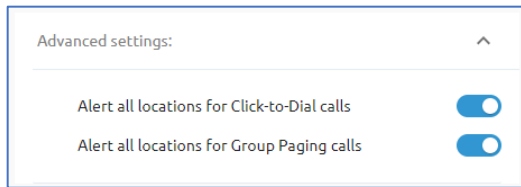
Mobility

This option is only displayed when Show Advanced Features is enabled. The Mobility service allows linking one or more personal numbers (for example your mobile, your private land line) to your business account. The user can define one or more network locations that can be used as extensions to your user profile. When you receive a call to your Hosted VoIP Phone System telephone number, all your devices will ring simultaneously. When you make a call out from the Telesystem Softphone client while you have the *Mobility* service enabled, you can perform a Call Back that will allow you to use your cell phone or home phone to place the call with your office phone's outgoing caller identification information.

- Off Net Mobility

Link your any personal number(s), even if not hosted on our network, to your business account.

Advanced settings allow you to activate *Alert all locations for Click-to-Dial/Group Paging* calls.

The **Off-net mobility numbers** section allows you to add phone numbers you would like to link to your business account.

1. To link a personal number, click the Add button ![+ Add] in this section.
2. Enter a number in the Phone Number field.
3. Enter a Description to assist you or an administrator with identifying the device or location of the device associated with the phone number you're adding.
4. Configure your Advanced Options.
   a. Select from the following:
      i. **Use Diversion Inhibitor**: Select this box to enable a diversion inhibitor when extending a call leg to the Mobility location.
      ii. **Use Answer Confirmation**: Check this box to determine if the Application Server needs to prompt for an answer confirmation when a call leg extended to the Mobility location is answered by the user.
      iii. **Call Control**: This attribute determines whether call control is to be performed by the Mobility location device or by the Hosted VoIP Phone System.
   b. Click Add

   Note: *Hosted VoIP Phone System-based Call Control Service should not be enabled for an intelligent device*
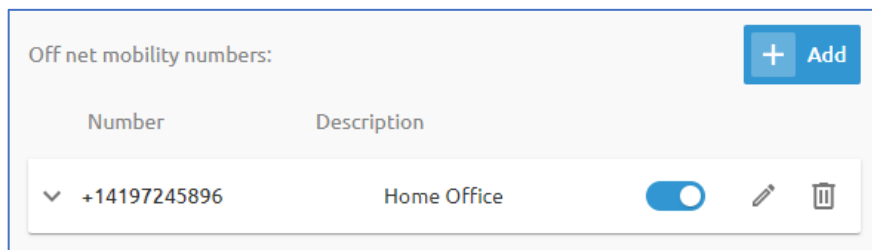
- Remote Office

With remote office you can link any number, even if not hosted on our network, so all the calls will be forwarded to this destination.

Note: *When the service is active the calls will be forwarded to this destination and other devices of yours will not ring.*

Add the desired phone number in the field, click *Save*. A phone number must be entered before the service can be enabled with the radio button.

Mobility

Off net mobility   Remote Office

With remote office you can link any number, even if not hosted on our network
and all the calls will be forwarded to this destination

Phone number   5366528842   ✓ Save | ✕ Cancel

⚠ When the service is active the calls will be forwarded to this destination and
    other devices of yours will not ring

Voicemail

The Voicemail section of the portal allows users to view, manage, configure, and modify the messages and settings for the voicemail service.
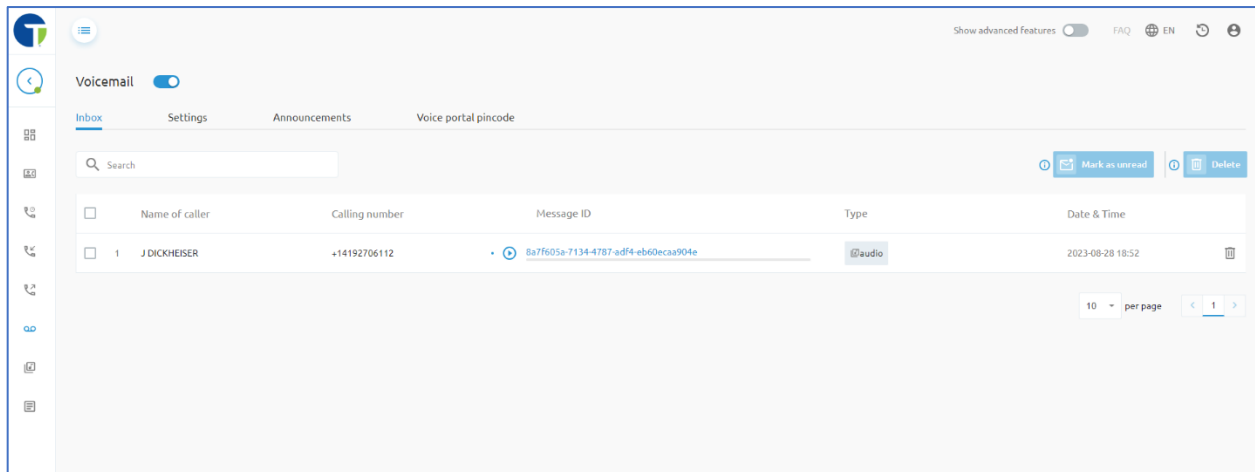
The voicemail service can be enabled/disabled by clicking the radio button Voicemail next to the title.

- ### Inbox

The **Inbox** tab allows you to view a list presenting any voicemail messages in your mailbox, with the information related to each message.

- Name of caller
- Calling number
- Message ID
- Message Type
- Date & Time message was received.

Each message listed can be listened to, marked as unread, or deleted through this tab.

- ### Settings

The **Settings** tab allows you to configure the following Voicemail features:

- Dictate how a call will be directed after an announcement is played (detail on how to configure announcements can be found [here](#))
  - The *Message Deposit* button must be turned off to view the Call Announcement options
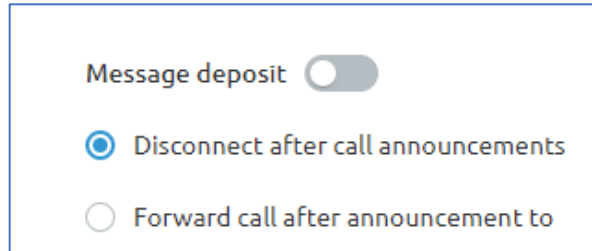
- Configure where messages are saved and how to send voicemail to an email address.
  - *Send to email* section allows you to either save messages on the voicemail server or send the messages to a designated email address and delete them from the server.
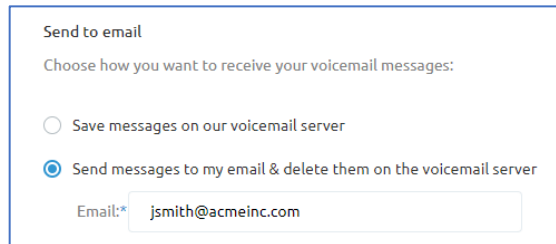
- Configure if/where you want a copy of your voicemail messages sent to an email address.
  - **Don't send a copy** – only directs messages as designated in the *Send to email* section.
  - **Send a copy to the following email** – will send an audio .mp3 copy of the voicemail message to the email address entered.

- **Transcribe audio message** – a transcribed text-to-speech message will be sent to the any/all email addresses entered in this section

A copy of your voicemail messages can be sent to an email address:

○ Don't send a copy

◉ Send a copy to following e-mail

    Email:*   jsmith@acmeinc.com

○ Transcribe audio message (text-to-speech) and send it to following e-mails

    Email:

    Email:

    Email:

    Email:

    Email:

      ✔ Save | ✕ Cancel

- Announcements

The Announcements tab is used to set different rules and flows which can be configured when you are busy and when you do not answer a call.
- **Busy** – sets what will happen when "Do not disturb" is enabled or when you are already engaged in another call.
  - ○ To choose the default announcement provided by your organization, select the *System* option.
  - ○ To choose a custom announcement, select the *Custom* option.
    - ▪ Custom audio files are created/managed in the Media section of the portal. Audio files (announcements) must be present in the Media section before they will appear on the custom audio files drop down list in this section.

⌃ Busy

When "Do not disturb" is enabled or when you already engaged in another call

Announcements:
○ System
◉ Personalized

Out of Office   ▾

    Out of Office

⌄   Quality Assurance Announcement

  - ○ Pick the desired custom audio file and click *Save*.

- **No Answer** – Played when all calls are forwarded to voicemail, or you don't pick after a designated number of rings.
  - **Number of rings before announcements** – choose number of rings before announcement is played.
  - Choose between the following answer options:
    - **No Answer** – if a call is unanswered within the number of rings designated previously in this section, play the chosen announcement.
      - To choose the default announcement provided by your organization, select the *System* option.
      - To choose a custom announcement, select the *Custom* option.
        - Custom audio files are created/managed in the [Media](#) section of the portal. Audio files (announcements) must be present in the Media section before they will appear on the custom audio files drop down list in this section.

      - Pick the desired custom audio file and click *Save.*
    - **Extended Away** – This allows you to setup a dedicated message when you are absent for an extended period (e.g., vacation)
      - *Message Deposit* – check this box if you want the caller to be able to leave a voicemail message after hearing the announcement. Unchecked will allow the caller to hear the announcement, but not have the option to leave a voicemail after.
      - Choose a custom announcement from the drop-down list.
        - Custom audio files are created/managed in the [Media](#) section of the portal. Audio files (announcements) must be present in the Media section before they will appear on the drop-down list in this section.
  - Click *Save* to complete this section.

- Voice Portal Pincode

Reset the pincode used to access your company's voice portal.

Click the edit icon ✎ to reset your voice portal pincode.
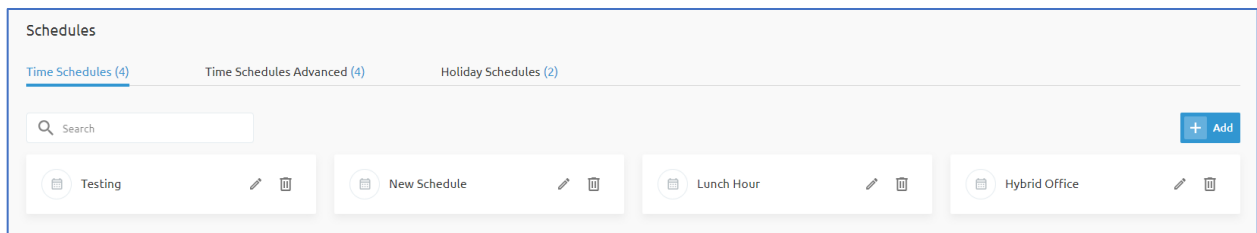
📅 Schedules

This option is only displayed when Show Advanced Features is enabled. The Schedules service allows creating timetables and holiday tables, which can then be used in other services requiring a Time or Holiday input.

This section allows you to manage your schedules. You may view, but not modify, the schedules defined for your Group or Enterprise. Schedules are used in services such as Sequential Ringing, or Call Forwarding Selective to specify the time when the service action (ringing the phone and/or forwarding calls) should take place. This page allows you to add, edit, rename, and delete a time schedule.

- **Time Schedules**

The **Time Schedules** tab lists all schedules that have been created and are available for assignment.

Follow these steps to create a new schedule:

1. Click the *Add* button ⊞ Add in the upper right corner of the page.
2. Enter the Schedule Name, click **Add**.
3. The new schedule will appear on the list.
4. Click the edit icon 🖬 to enter the date/time parameters.
5. Choose the time block the schedule will apply to
6. Complete the schedule details screen and click **Add.**

- Time Schedules Advanced

The **Time Schedules Advanced** tab lists all schedules that have been created and are available for assignment. You must be on the Time Scheduled Advanced tab to see the advanced features when adding a new schedule.

Follow these steps to create a new schedule:

1. Click the *Add* button [+ Add] in the upper right corner of the page.
2. Enter the Schedule Name, click **Add.**
3. The new schedule will appear on the list.
4. Click the edit icon to enter the date/time parameters.
5. Choose the time block the schedule will apply to
6. Complete the schedule details screen and click **Add.**

- Holiday Schedules

The **Holiday Schedules** tab lists all schedules that have been created and are available for assignment.

Follow these steps to create a new holiday schedule:

1. Click the *Add* button in the upper right corner of the page.
2. Enter the Schedule Name, click **Add.**
3. The new schedule will appear on the list.
4. Click the edit icon to enter the parameters.
5. Click the *Add* button to enter the event details.
6. Complete the holiday details screen and click **Add.**
7. The holiday details will appear on the list for that specific schedule

Media

The Media section allows setting the sound file used for announcements and ringback features. This section allows users to perform the following services:

- Upload a media file.
- Record an announcement.
- Select one from our library.

Media files are used in different places within the Portal such as:

- The announcement for the incoming call service
- To define a Pre-alerting message
- The Voicemail configuration

To add a new media file:

1. Click the Add button ![+ Add] in the upper right corner.
2. Choose the file creation method:
   a. *Upload media file*
      i. Select the upload icon and choose the location of the file
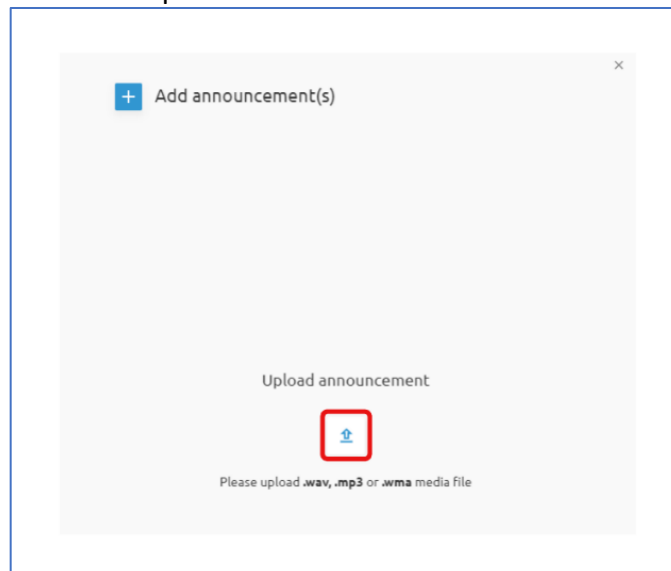
   b. *Record Announcements*
      i. Select the record icon to create a new media file
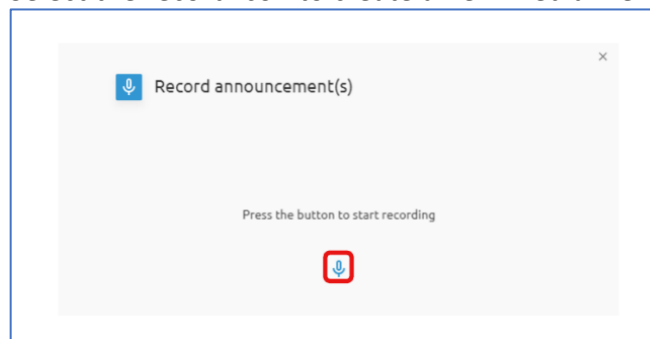
Media files can be downloaded, edited, played, or deleted from the main Media screen.
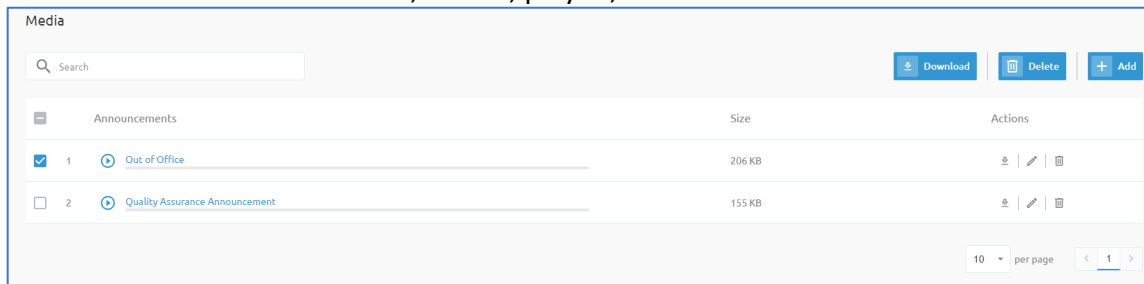
🎧 Call Recording

Managed Call Recording is a web-based solution that provides a real-time view of the system data, enabled PCI Compliant call recording, monitoring, managing recorded calls, reporting, and the storage of recorded calls.

Note: *Managed Call recording is a feature that requires separate licensing and therefore will not appear in the portal unless the appropriate licenses have been purchased and applied to the customer account. Please contact your Account Representative to discuss options and pricing for the Call Recording service if interested*.

The first section determines when call recording will be activated on your account.

The second section designates the type and frequency of call recording notifications.

Call Center

The Call Center section will only be available to users who have a Call Center Agent license assigned to them. This section displays your current Automatic Call Distribution (ACD) state as well as all the ACDs or call centers you belong to and whether you are currently joined in their call centers. You will be able to set your ACD status in this section also.

The *My Call Centers* list allows users to enable/disable any call center groups they belong to as well the ability to change their status between the following options:

- **Available** - You are ready to receive calls form the contact center.
- **Unavailable** - You cannot receive calls (for example when taking a break).
- **Wrap-Up** - You cannot receive calls for a certain time after you have handled your call (for example to do administrative work after you have closed a call with a customer).
- **Sign-In** - You log in into the contact center queue and start receiving calls from the call center.
- **Sign-Out** - You log-out of the contact center queue and will not receive any calls from the call center.

Details

The Details section gives additional details about your account.

The information displayed in the section header shows:
- Username assigned to the account.
- Reset Pincode link.
- Primary phone number
- Extension

The **Details** tab displays the Main/Contact/Address Information for the account.

The **Licenses** tab displays any licenses assigned to the account
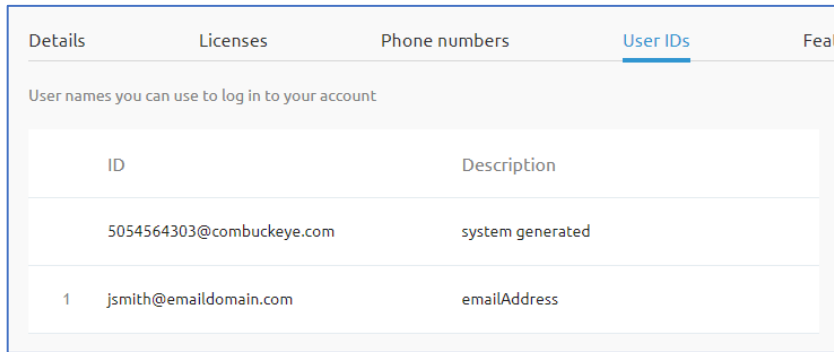
The **Phone Numbers** tab displays the extension, phone number, and outbound CLI assigned to the account. The additional numbers section will display any alternate numbers assigned. The *Distinct ring* button will allow you to enable an alternate ring than the ring assigned to the main number.
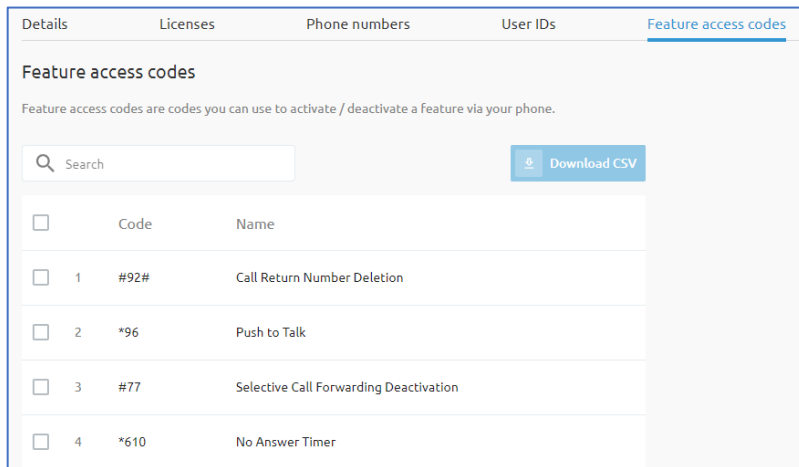
The **User IDs** tab displays other usernames you can use to log in to your account.

The **Feature access codes** tab displays codes available on the system. Feature access codes are codes you can use to activate / deactivate a feature via your phone without using Graphical User Interface. The checkbox in front of the feature access code allows selecting which one you would like to download in the .csv file.

The **Webex Account** tab displays your Webex account information (if the Webex functionality is active for your account). Through this tab, you can download and register yourself on the Webex application account.
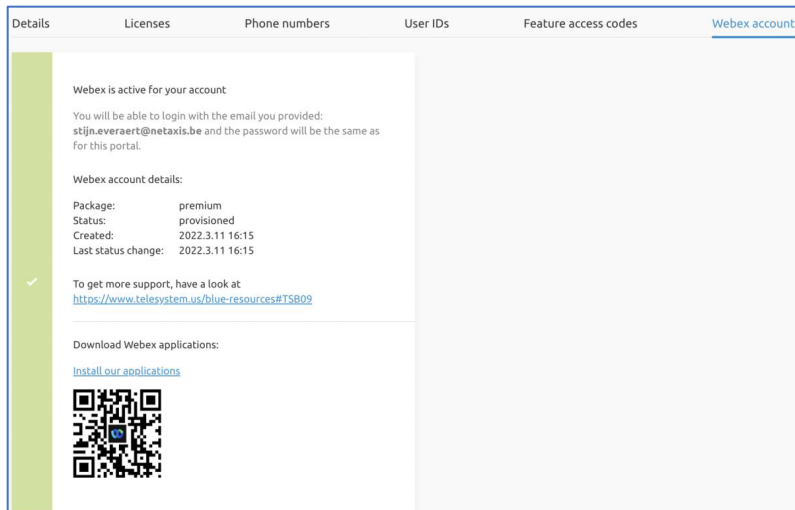
The **Advanced Settings** tab displays additional features available on your account.

- *Barge in Exempt* - The Barge-In service allows others within your group to join your calls. Barge-in Exempt disables this. When this service is on, others within your group cannot interrupt your calls with the Directed Call Pickup with Barge-in. When this service is off, others within your group can join or pick up your calls with the Directed Call Pickup with Barge-in service.