



CLOUD SERVICES PORTAL

User Guide

In This Guide

WELCOME	6
PORTAL INTRODUCTION	7
SIGN IN	7
SITE TOUR	8
QUICK ACCESS TOOLS	8
MENU	8
MY SERVICES DASHBOARD.....	8
MY TOOLS.....	9
Documents.....	9
Download a Document	9
Contact Directory	9
ACCOUNT MANAGEMENT	10
DASHBOARD SECTIONS.....	10
PROFILE	10
View Profile	10
Change e911 Address (Temporary)	11
Add a Temporary e911 Service Address.....	11
Edit Primary e911 Service Address.....	11
Reset to Primary e911 Service Address	11
Change Recovery/Notification Email	11
Change Password	12
Edit Profile	12
Additional Profile Settings	12
APPLICATIONS	13
CONTACT DIRECTORY.....	13
Add a Custom Contact	13
Edit a Custom Contact	14
Delete a Custom Contact	14
View the Enterprise Custom Contact Directory.....	14
VOICEMAIL	14
Enable/Disable Voicemail	14
Play Voicemail	14
Download Voicemail.....	14
Forward Voicemail	14
Voicemail Block Delete.....	15
View All Voicemails	15
Reset Voicemail Pin	15
Manage Voicemail Settings.....	15
Voice Messaging.....	15
Send All Calls to Voicemail.....	15
Send Busy Calls to Voicemail	15
Send Unanswered Calls to Voicemail.....	15
Forward to Multiple Emails	15
Forward to One Email	16
Notify Me by Email When New Messages Arrive.....	16
Email a Carbon Copy of the Message.....	16
Transfer on '0' to Phone Number.....	16
CALL LOGS	16

Filter Call Logs	16
View All Call Logs & Details	16
BASIC FEATURES	17
WORKING WITH SETTINGS	17
Access the Settings Page	17
To View / Edit Feature Settings	17
Profile	18
Manage Profile	18
Anonymous Call Rejection	18
Manage Anonymous Call Rejection	18
Announcement Repository	18
Add an Announcement File	18
Download an Announcement File	18
Edit an Announcement File	19
Delete an Announcement File	19
Barge-In Exempt	19
Call Block	19
Add a Call Block	19
Edit a Call Block	20
Activate a Call Block	20
Delete a Call Block	20
Caller ID	20
Manage Caller ID	20
Call Notify	20
Setup Call Notify	20
Activate Call Notify	21
Edit Call Notify Settings	21
Delete Call Notify	21
Call Transfer (Recall)	21
Manage Call Transfer Recalls	21
Call Waiting	22
Manage Call Waiting	22
Connected Line Identification Restriction	22
Manage Connected Line ID Restriction	22
Conference List	22
Add a Conference Listing	22
Manage Conference Recordings	23
Edit a Conference Listing	23
Delete a Conference Listing	23
Launch Moderator Tool	23
Download the Conference Microsoft Outlook Add-In	23
Manage Conference Moderators	24
Custom Ringback User	24
Add a Custom Ringback List	24
Edit a Custom Ringback List	24
Delete a Custom Ringback List	25
Direct Call Pickup with Barge-In	25
Do Not Disturb	25
Manage Do Not Disturb	25
Hoteling Guest	25
Manage Hoteling Guest	25
Hoteling Host	26
Manage Hoteling Host	26
Music On Hold	26
Manage Music On Hold	26
Outbound Caller ID Block	26

- Manage Outbound Caller ID Block26
- Pre-Alerting Announcement27
 - Add a Pre-Alerting Announcement27
 - Edit a Pre-Alerting Announcement27
 - Delete a Pre-Alerting Announcement.....28
- Priority Alert.....28
 - Add a Priority Alert.....28
 - Activate a Priority Alert28
 - Edit a Priority Alert28
 - Delete a Priority Alert.....29
- Privacy29
 - Manage Privacy29
- Selective Call Acceptance.....29
 - Add a Selective Call Acceptance List29
 - Edit a Selective Call Acceptance List30
 - Delete a Selective Call Acceptance List.....30
- Speed Dial30
 - Add a Speed Dial Contact.....30
 - Edit a Speed Dial Contact.....30
 - Delete a Speed Dial Contact31
 - Export Speed Dial Contact List.....31
- Call Forwarding31
 - Set Call Forwarding Number(s).....31
 - Edit Call Forwarding Numbers.....31
 - Delete Call Forwarding Numbers31
- Call Forwarding Selective32
 - Add a Call Forwarding Selective List.....32
 - Edit a Call Forwarding Selective List.....32
 - Delete a Call Forwarding Selective List.....33
- Find Me – Simultaneous Ring.....33
 - Setup Find Me – Simultaneous Ring Numbers.....33
 - Setup Find Me – Simultaneous Ring Triggers.....33
 - Edit Find Me – Simultaneous Ring.....34
 - Delete Find Me – Simultaneous Ring.....34
- Find Me – Sequential Ring34
 - Setup Find Me – Sequential Ring.....34
 - Setup Find Me – Sequential Ring Triggers34
 - Edit Find Me – Sequential Ring.....35
 - Delete Find Me – Sequential Ring35
- Push to Talk.....35
 - Manage Push To Talk35
- Contact Centers.....36
 - Manage Contact Center Settings.....36
- Client App36
- Supervisor36
 - Manage Supervisor Settings36
- Fax-to-Email / Email-to-Fax37
- Voicemail37
- Distribution List37
 - Manage Distribution List.....37
- Reset Voicemail Pin37
- Anywhere.....37
 - Setup Anywhere37
 - Edit Anywhere38
 - Delete Anywhere38
- Remote Office38
 - Manage Remote Office38

- Enterprise Directory38
 - Print Enterprise Directory Summary.....38
 - Print Enterprise Directory Details.....38
- Time Schedule39
 - Add a Schedule39
 - View a Schedule.....39
 - Delete a Schedule.....39
 - Add an Event39
 - Edit an Event39
 - Delete an Event39

Welcome

Welcome to your new voice services management portal.

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

It should be noted that this guide describes all features and tools that *can be* offered and provides example views of the site which may not match the colors or logos displayed to you in your portal. Also, some features or sections described here may not be included with every subscription type or offered to all users. Please contact your service provider with questions or requests for more information about the features and services that are available in your subscription.

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

Portal Introduction

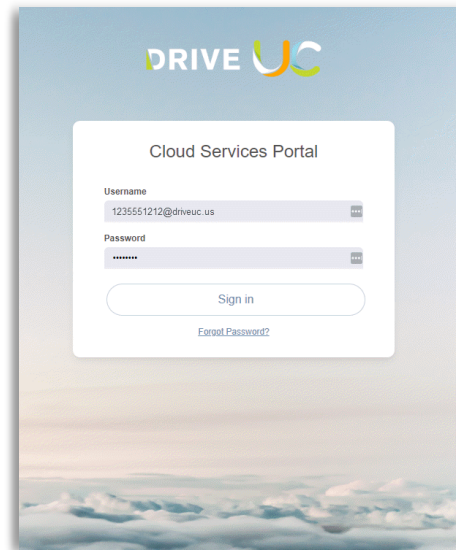
The Cloud Services Portal makes it easy for subscribers to customize and manage account information and feature settings online.

Sign In

To Access the Cloud Services Portal:

1. Open a web browser (Chrome, Mozilla, Explorer, etc.) and enter the URL (web address) provided to you for online account management.
Example: <https://portal.driveUC.com/>
2. Enter your **Username** (xxxxxxxxx@domain.xx) and **Password** credentials, as requested.
3. Click the **Sign In** button and the Cloud Services Portal opens.

If available, the [Forgot Password?](#) link may be used to retrieve your portal sign in credentials via email.



Once you have signed into the **Cloud Services Portal**, access to the tools and features you need to easily manage your communications and account setup is right at your fingertips.

For your security, the connection to the portal will automatically close and return to the Sign In page when idle for an extended period of time.

Although it is currently *optimized* for desktop usage, the portal *is* accessible by any Internet-enabled device – including tablets or smart phones – so you can manage your services, whether you are in your office or on the go.

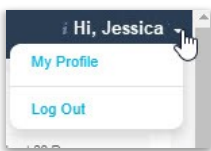
Site Tour

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

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

Quick Access Tools

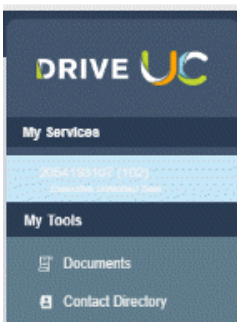
The **Hi, <Name or Phone#>** drop-down menu (top right) offers direct links to:



- ❖ My Profile – View and edit (if authorized) the account Profile information.
- ❖ Log Out – Exit and return to the Cloud Services Portal Sign In page.

Menu

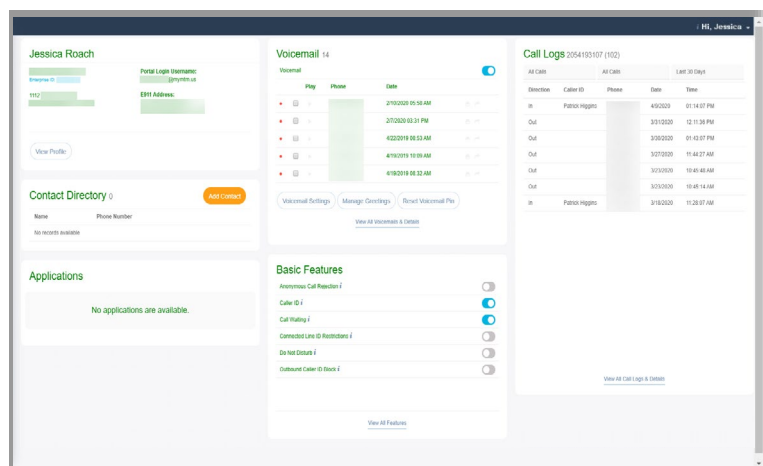
The panel on the left offers direct menu access to areas the user may view. These options can include:



- Logo – The logo image offers a quick link back to the Dashboard / Home Page for a selected account.
- My Services – Access to the My Services Dashboard for any line(s) and extensions included on an individual account. Clicking on a listing opens the dashboard for that item.
- My Tools – Access to the **Documents** section to view any guides and references offered to users by the provider and the enterprise-level **Contact Directory**. to view a read-only list of any contacts entered.

My Services Dashboard

The **My Services Dashboard** is the Home page. It displays important account information and offers quick access to manage features and settings for individual accounts. All the tools and features within or related to the account are accessible from this page. The feature section widgets (cards) on the Dashboard provide easy access to related information and tools for managing account settings.

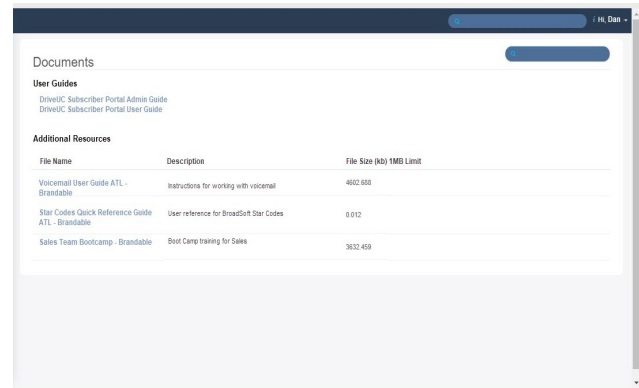


My Tools

Documents

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

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

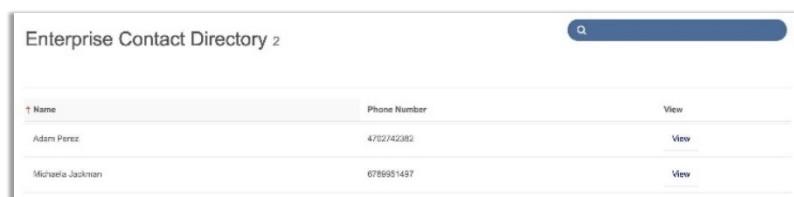


Download a Document

- ❖ Click on a **Document Title** within one of the lists to download the selected file to the *Downloads* folder on your PC. The file name displays within a *Windows Download* tab below the Application at the bottom of the browser window for easy access.
- ❖ Click on the **'Downloaded File' tab** at the bottom of the browser window to open the file for review or edit (where brandable), and/or to **Save** the file to a local folder or computer drive for print or digital distribution.

Contact Directory

Users may review any listings that may have been added in the Enterprise-level Custom Contact Directory, which displays to hosted voice phone users in the Common Directory.

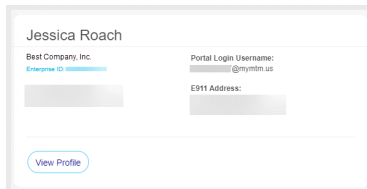


Account Management

Dashboard Sections

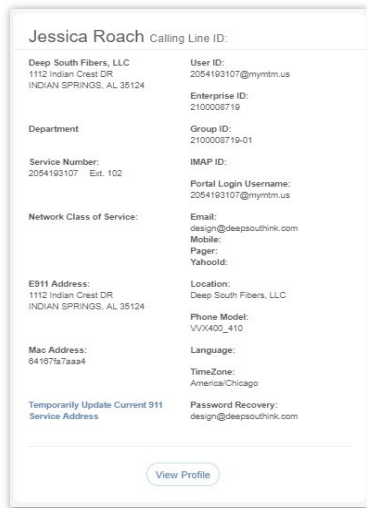
- ❖ Profile - This dashboard section widget (card) displays your profile information and links to the **View Profile** page where access to manage your profile settings, password, e911 features, and notification email addresses is provided.
- ❖ Call Logs – This card offers the recent Call Log history and links to a view of up to 1000 incoming and outgoing calls over the past 90 days.
- ❖ Voicemail – This card displays recent messages and links to the **Voicemail Settings** and lists for easy access to manage your voicemail and messaging features.
- ❖ Contact Directory – This card allows the user to add and manage up to 99 custom contact directory listings/speed dials for their hosted phone within the system
- ❖ Applications – This card provides helpful links to the Sign In or landing pages of any add-on modules or applications on your account.
- ❖ Basic Features – This card offers quick access to your On / Off settings and a link to the **Settings** page where management tools for additional features and services are provided.

Profile



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

The My Profile link found in the toolbar (the drop down by your name) shows another view with a similar link to View Profile.

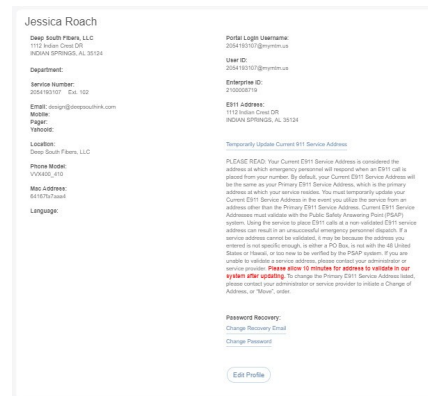


The following features and access links are all provided via the **Profile** card on the My (User) Services Dashboard:

View Profile

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

Secondary links to [Edit Profile](#), [Change Password](#) and other setting tools are also included in the [View Profile](#) view.



Change e911 Address (Temporary)

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

Add a Temporary e911 Service Address

1. Click on the [Temporarily Update Current 911 Service Address](#) link to begin.
2. Enter the complete Address information for the temporary address you wish to use in the fields provided.
3. Click on the [Save](#) button to submit the information and receive a **Success!** message when the address confirmation process completes.

Please allow up to 10 minutes for the address to validate after updating. If the address cannot be validated, it may be because the information is not specific enough, is for a PO Box, is not within the continental United States, Puerto Rico, or Hawaii, or is too new to be verified by the PSAP system. If you are unable to validate a service address, please contact your Administrator or service provider for assistance.

Edit Primary e911 Service Address

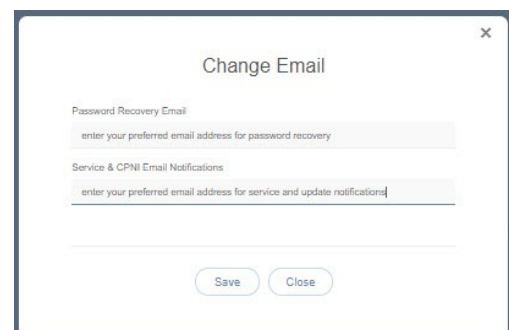
By default, your e911 Service Address is the primary address of record for your service account. If a change is required, please contact your Administrator or service provider to initiate a Change of Address (or “Move” order) to change the Primary E911 Service Address permanently.

Reset to Primary e911 Service Address

1. Click on the [Temporarily Update Current 911 Service Address](#) link in the [View Profile](#) dialog.
2. Click on the [Reset to Primary](#) link.
3. Click on the [Save](#) button to submit the change and receive a **Success!** message when it is completed.

Change Recovery/Notification Email

1. Click the [Change Recovery Email](#) link to open the Change Email dialog.
2. **Password Recovery Email:** Enter or change the email address on file for recovering your login information.
3. **Service & CPNI Email Notifications:** Enter or change the email address on file for receipt of notifications from the provider.
4. Click on the [Save](#) button when your edits are complete.



Change Password

The [Change Password](#) link provides direct access to update your unified communications password information.

1. Click on the [Change Password](#) link.
2. Type a new Password.
3. Retype to verify.
4. Click the [Save](#) button.

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

Edit Profile

[Edit Profile](#)

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

In View Profile:

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

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

Additional Profile Settings

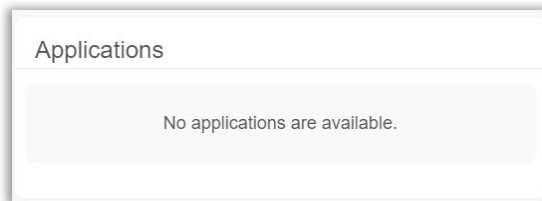
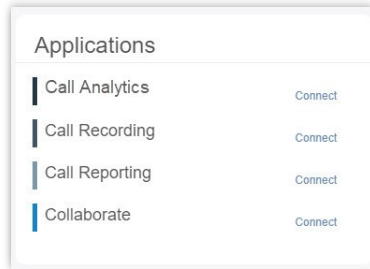
Access to additional profile settings for the directory and monitoring services is provided in the [Settings](#) page.

See Also: [Profile \(in Settings\)](#).

Applications

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

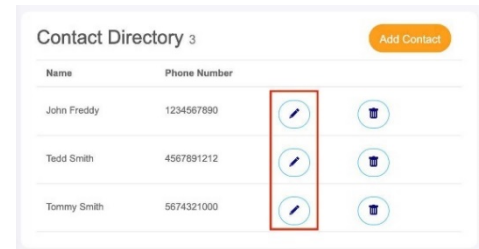
1. Click on the **Connect** link to open the sign in or landing page of the corresponding option in a new browser window.



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

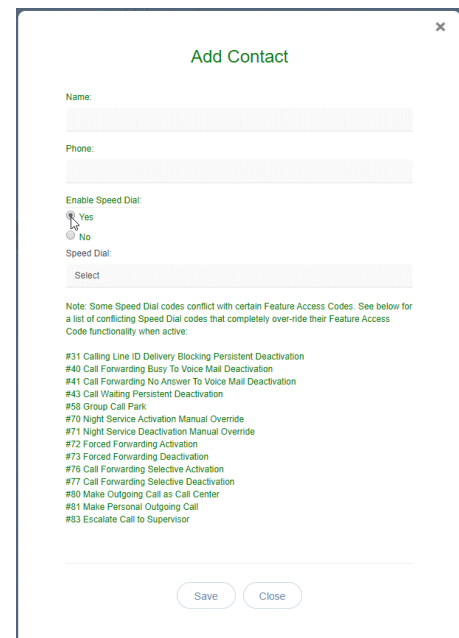
Contact Directory

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




Add a Custom Contact


1. Click on the **Add Contact** button within the Contact Directory card.
2. Enter or select the following:
 - ❖ **Name** – Type the name of the contact.
 - ❖ **Phone** – Type the contact’s phone number.
 - ❖ **Enable Speed Dial** – *Optional*. Select Yes | No (default)
 - ❖ **Speed Dial** – If Yes was selected, you must choose an option from the drop-down tool. Note: Use caution and do not select a speed dial number that correlates to an item listed below if the feature is enabled for use in your account.
3. Click **Save** when finished to submit the changes and update the system with the new information. The dialog closes and displays the new contact within the Contact Directory card. The directory on the hosted phone updates within minutes to include this new contact.



Edit a Custom Contact

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


Delete a Custom Contact

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

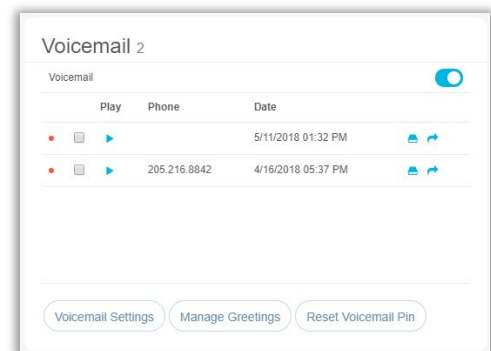
View the Enterprise Custom Contact Directory

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

Voicemail

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

Many Voicemail settings are also found within the Voicemail Edit view in the **Settings** page.



Enable/Disable Voicemail

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

Play Voicemail

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

Download Voicemail

-  Click on the **Download** icon next to a message to download and save a copy of the message file to a location on your system.

Forward Voicemail

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

Voicemail Block | Delete

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

- ❖ **Block** disallows future calls from the number without providing a warning message to the caller.
- ❖ **Delete** immediately removes the Voicemail from your dashboard/phone list and deletes the record/recording fully from the database at midnight.

View All Voicemails

Click on the [View All Voicemails](#) link below the list to open the dialog and review or manage any additional voicemails.


Reset Voicemail Pin

Reset Voicemail Pin

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

Manage Voicemail Settings

Voicemail Settings

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

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

Voice Messaging

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

Send All Calls to Voicemail

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

Send Busy Calls to Voicemail

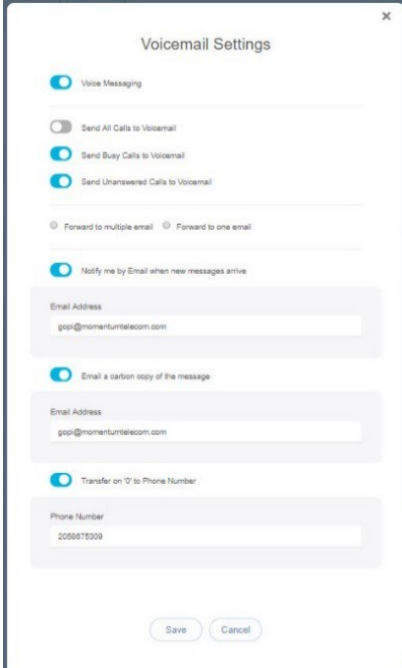
On | Off – When this setting is enabled, new incoming calls are sent directly to voicemail if the line is already in use (busy).

Send Unanswered Calls to Voicemail

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

Forward to Multiple Emails

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



Forward to One Email

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

Notify Me by Email When New Messages Arrive

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

Email a Carbon Copy of the Message

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

Transfer on ‘0’ to Phone Number

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

Call Logs

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

Filter Call Logs

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

Call Type

- All Calls
- Incoming Calls
- Outgoing Calls

Call Connection Type

- All Calls
- Connected
- No Answer
- Incomplete
- Forwarded

Date

- Today
- Yesterday
- Last 7 Days
- Last 30 Days
- Last 90 Days
- Custom

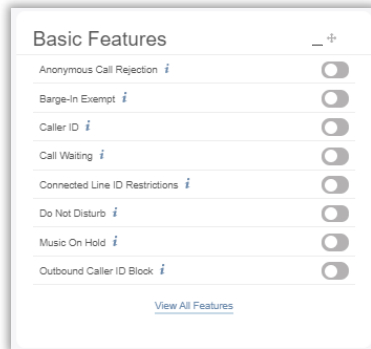
Call Logs				
All Calls	All Calls	Today		
<input type="checkbox"/>	Direction	Call	Phone	Date
<input type="checkbox"/>	outgoing	Miran	237 401	1/13/18
<input type="checkbox"/>	outgoing	Chan	822 059	1/13/18
<input type="checkbox"/>	incoming	Marc	595 947	1/13/18
<input type="checkbox"/>	outgoing	Wync	714 635	1/13/18
<input type="checkbox"/>	incoming	Shen	391 594	1/13/18
<input type="checkbox"/>	outgoing	Anna	321 332	1/13/18
<input type="checkbox"/>	outgoing	Aishi	345 790	1/13/18
<input type="checkbox"/>	outgoing	Alien	674 970	1/13/18
<input type="checkbox"/>	outgoing	Sung	522 410	1/13/18
<input type="checkbox"/>	incoming	Ivory	612 407	1/13/18
<input type="checkbox"/>	incoming	Jacq	755 094	1/13/18
<input type="checkbox"/>	incoming	Deed	953 262	1/13/18
<input type="checkbox"/>	outgoing	Del F	996 201	1/13/18
<input type="checkbox"/>	incoming	Duan	576 684	1/13/18
<input type="checkbox"/>	outgoing	Sharl	647 236	1/13/18
<input type="checkbox"/>	outgoing	Carrn	682 850	1/13/18
<input type="checkbox"/>	incoming	Betty	920 758	1/13/18
<input type="checkbox"/>	incoming	Rash	555 527	1/13/18
<input type="checkbox"/>	incoming	Kimb	799 365	1/13/18
<input type="checkbox"/>	outgoing	Chan	996 921	1/13/18

View All Call Logs & Details

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

Basic Features

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



Each item displayed within the Basic Features card on the Dashboard is an

On / Off setting for the individual user account. Descriptions of the features that are provided for management here display as pop-up information by placing the cursor over the **i** icon next to an item.



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

Additional settings may be managed by clicking on the [View All Features](#) link at the bottom of this dashboard card.

Working with Settings

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

- ❖ Features are generally grouped by type to make similar features easy to locate.
- ❖ On/Off features show their current status within the table.
- ❖ The arrow ► under the [View/Edit](#) column (far right) adjacent to a feature opens the **Edit** view.
- ❖ While viewing a feature's setting details, the **See instructions** icon at the bottom of the view provides access to helpful information about setup and/or interactions with other features.
- ❖ Many of the On/Off features shown in this list and the individually enabled settings shown here may also be managed through the device using phone codes, AKA: Star Codes. (ex: *77).

Profile	ON/OFF	VIEW/EDIT
General		
Anonymous Call Rejection	OFF	►
Announcement Repository	OFF	►
Call Block	OFF	►
Caller ID	ON	►
Call Busy	OFF	►
Call Waiting	OFF	►
Connected Line Identification Restriction	OFF	►
Do Not Disturb	ON	►
Hotline Guest	ON	►
Hotline Host	ON	►
Outbound Caller ID Block	ON	►
Priority Alert	OFF	►
Privacy	OFF	►
Selective Call Acceptance	ON	►
Speed Dial	OFF	►
Forwarding		
Call Forwarding Selective	OFF	►
Fast Forward - Simultaneous Ring	ON	►
Fast Forward - Sequential Ring	OFF	►
Push to Talk	ON	►
Messaging		
Message	ON/OFF	VIEW/EDIT
Message List	ON	►
Next Vicinalist Pin	OFF	►
Network		
Anywhere	OFF	VIEW/EDIT
Use Network	ON/OFF	VIEW/EDIT
Corporate Directory	ON	►
Time Schedule	ON	►



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

Access the Settings Page

In the **My Services Dashboard**:

1. Click on the [View All Settings](#) link in the Basic Features card to open the **Settings** page.

To View / Edit Feature Settings

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

Profile

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

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

Manage Profile

1. Enter any information that you wish to make available in lists or directories.
2. Click the **Save** button to update and return to the **Settings** page.

Anonymous Call Rejection

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

Manage Anonymous Call Rejection

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

Announcement Repository

The **Announcement Repository** service offers the ability to upload and store message .wav files for use as Voicemail greetings and announcement messages.

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

Description	Type	FileSize	Download	Edit
Voice Portal 2017-11-02 20:04:48.778_001	WAV	15	Download	Edit

Add an Announcement File

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

Download an Announcement File

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

Edit an Announcement File

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

Delete an Announcement File

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

1. Click to place a check in the box next to an Announcement in the file list to select it.
2. Click on the [Delete](#) button.

Barge-In Exempt

On | Off Setting. When enabled (**ON**), barge in attempts Click the adjacent drop-down arrow ► to access this feature's *Edit* view.



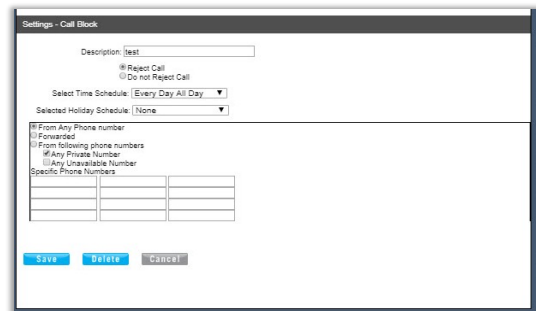
Call Block

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



Add a Call Block

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



Edit a Call Block

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

Activate a Call Block

1. Click to place a checkmark next to a Call Block entry to [activate](#) that selection.
2. Click the [Save](#) button to submit the change and close the *Edit* view.

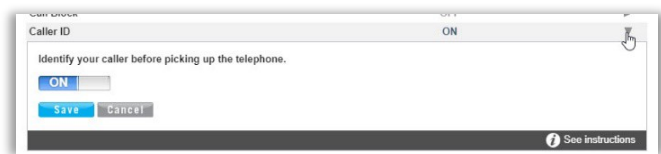
Delete a Call Block

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

1. Click on the [Edit](#) link next to a Call Block entry.
2. Click the [Delete](#) button to remove the selected Call Block and its information from the system.

Caller ID

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

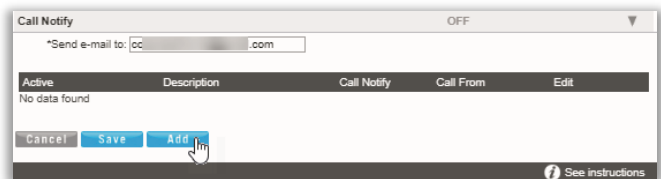


Manage Caller ID

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

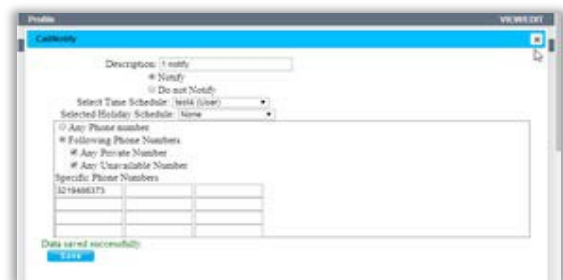
Call Notify

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



Setup Call Notify

1. **Send email to:** Enter the email address for call notifications.
2. Click the [Add](#) button to define new *Call Notify* criteria.
3. **Description:** Enter a name to display in lists.
4. Select or define the following options, as needed:
 - ❖ **Set to Notify or Do NotNotify.**
 - ❖ **Time Schedule:** Select from the drop-down menu of pre-defined Time Schedules.



- ❖ **Holiday Schedule:** Select from the drop-down menu of pre-defined Holiday Schedules.
 - ❖ **Call Policies:** Select an option from the following - From Any Phone Number, Following Phone Numbers, Any Private Numbers, Any Unavailable Numbers, and/or specify up to twelve (12) Phone Numbers, as needed.
5. Click the [Save](#) button and wait for the **Data Saved Successfully!** message to display.
 6. Click on the Exit icon to close the criteria dialog.
 7. Click the [Save](#) button to update the system and close the *Edit* view.

Activate Call Notify

1. Click to place a check in the box under the [Active](#) column for a listing to activate it.

Edit Call Notify Settings

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



Delete Call Notify

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

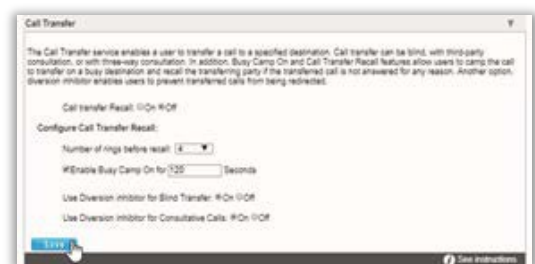
Call Transfer (Recall)

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

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

Manage Call Transfer Recalls

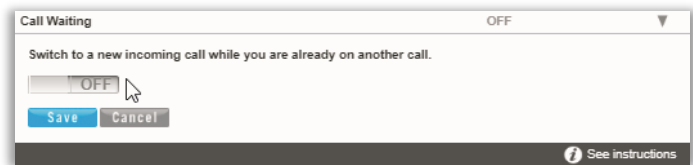
1. Click within the radial button to turn the service **On** or **Off**.
2. Configure the following setting options, as needed:
 - ❖ **Number of rings before Recall:** Select a number of rings from the drop-down menu.
 - ❖ **Enable Busy Camp On for x Seconds:** Turn on 'busy' for a set time.
Click to place a check in the box to enable (or disable) and enter a number of seconds.



- ❖ Use Diversion Inhibitor for Blind Transfer: Disallow auto-redirects on Blind Transfers. Click within a radial button to set to ☉ On or ○ Off.
 - ❖ Use Diversion Inhibitor for Consultative Transfer: Disallow auto-redirects on Consultative Transfers. Click within a radial button to set to ☉ On or ○ Off.
3. Click on the [Save](#) button to submit the setup/change(s) and close the *Edit* view.

Call Waiting

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



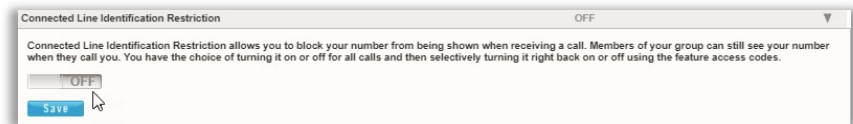
Manage Call Waiting

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

Connected Line Identification Restriction

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

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

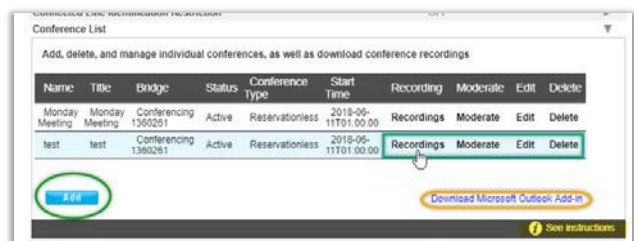


Manage Connected Line ID Restriction

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

Conference List

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



Add a Conference Listing

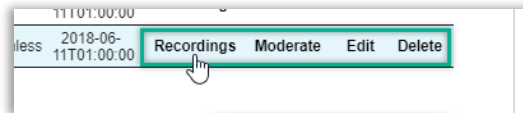
1. Click on the [Add](#) button to create a new conference.
2. Select the appropriate Conference Bridge type from the drop-down menu.
3. Define the following:
 - ❖ Title (a short description of the conference)
 - ❖ Estimated Number of Participants _____
 - ❖ Maximum Number of Participants _____

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

Manage Conference Recordings

The following [recording](#) management tools are provided in the *Edit* view:

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



Edit a Conference Listing

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

Delete a Conference Listing

Use Caution. The item and all its information are immediately removed from the system.

1. Click on the [Delete](#) option next to the appropriate Conference Listing to *Immediately* remove it.

Launch Moderator Tool

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

Download the Conference Microsoft Outlook Add-In

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

Manage Conference Moderators

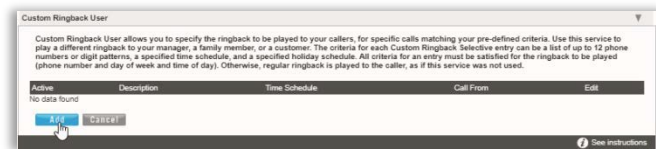
1. Click [Edit](#) next to the appropriate Conference listing.
2. Highlight the appropriate Available Users and use the arrows ◀ ▶ to move them to/from the Conference Moderators section.
3. Click the [Save](#) button to return to the [Settings](#) list when finished.

Custom Ringback User

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

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

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



Add a Custom Ringback List

1. Click on the [Add](#) button to begin defining a Custom Ringback listing.
2. Description: Type a name that will display in the Custom Ringback list.
3. Enter or select from the following options, as needed:
 - ❖ Play Custom Ringback: Click within the radial button to enable
 - ❖ Do not play custom ringback: Click within the radial button to enable
 - ❖ Selected Time Schedule: Use the drop-down menu to select the correct option.
 - ❖ Selected Holiday Schedule: Use the drop-down menu to select the correct option.
 - ❖ Audio Ringback: Click to enable *No personal Ringback*, *URL* or *Personal Ringback File* and enter or use the drop-down menus to include the information required for your selection.
 - ❖ Calls From: Click to select *Any Phone Number* or *Following Phone Numbers*
 - ❖ As Needed: Click within the adjacent checkboxes to include calls from Any private number, and/or Any unavailable number.
 - ❖ Specific Phone Numbers: Enter the 10-digit numbers in the fields provided, as needed to define calls from specific numbers.
4. Click on the [Save](#) button to submit the new Custom Ringback listing and close the *Edit* view.

Edit a Custom Ringback List

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

Delete a Custom Ringback List

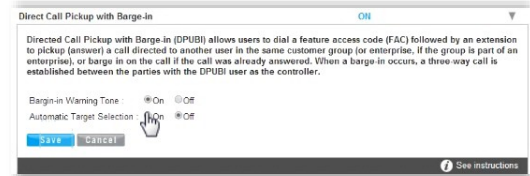
Use Caution. Once Delete is selected, the item and all its information are immediately removed from the system.

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

Direct Call Pickup with Barge-In

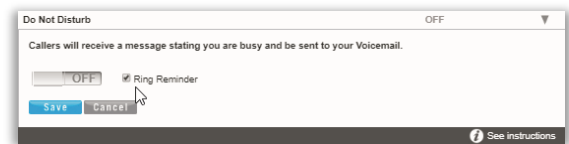
Dial into a call to another member of the group and if already answered, create a 3 way conference. Click the adjacent drop-down arrow to access this feature's *Edit* view and enable the following options:

1. Barge-In Warning Tone: Click [On](#) to enable the tone
2. Automatic Target Selection: Click [On](#) to enable.
3. Click the [Save](#) button to submit the change and close the view.



Do Not Disturb

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



Manage Do Not Disturb

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

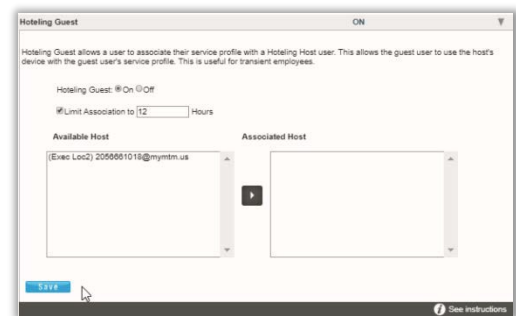
Hoteling Guest

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

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

Manage Hoteling Guest

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



Hoteling Host

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

Manage Hoteling Host

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

Music On Hold

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

Manage Music On Hold

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

Outbound Caller ID Block

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

Manage Outbound Caller ID Block

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

Pre-Alerting Announcement

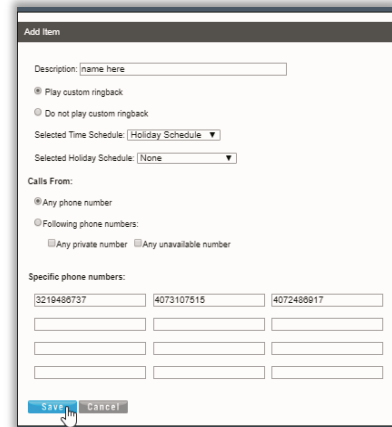
The **Pre-Alerting Announcement** service allows authorized users to specify an audio or video announcement to be played to calls matching pre-defined criteria before the call is actually connected.

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



Add a Pre-Alerting Announcement

- Click within the appropriate Pre-Alerting Announcement radial button ☉ to turn the feature **On** (enable) or Off.
- Click to select from the following basic options in the Audio Announcement or Video Announcement section:
 - ❖ Default Announcement: Click to select this option.
 - ❖ URL: Click to select this option and enter the URL web address in the adjacent text field.
 - ❖ Personal Ringback File: Click to select this option and select the correct option from the drop-down menu.
- Click on the **Add** button to open the *Add Item* view.
- Description:** Enter a name in the field provided.
- Select the following *usage options*, as needed:
 - ❖ ☉ Play Custom Ringback, or
 - ❖ ☉ Do not play custom ringback
 - ❖ Selected Time Schedule: Choose an option from the drop-down menu.
 - ❖ Selected Holiday Schedule: Choose an option from the drop-down menu.
- Calls From:** Select the following options, as needed:
 - ❖ ☉ Any phone number, or
 - ❖ ☉ Following Phone Numbers (and specify up to twelve (12) 10-digit numbers in the fields below).
 - ❖ Any Private Number
 - ❖ Any unavailable number
- Click on the **Save** button in the *Add Item* dialog to submit the criteria and return focus to the settings dialog.
- Click on the **Save** button in to update the system and return to **Settings**.



Edit a Pre-Alerting Announcement

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

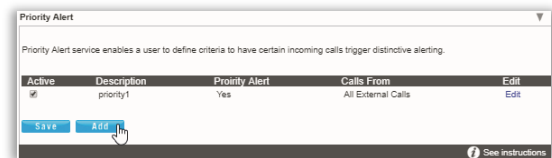
Delete a Pre-Alerting Announcement

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

Priority Alert

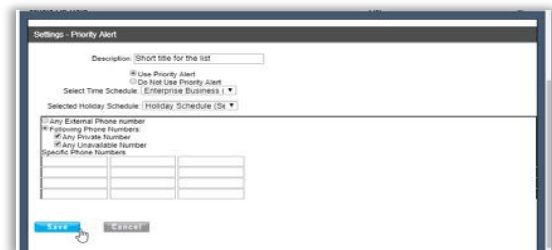
The **Priority Alert** feature allows a user to define criteria that triggers distinctive alerts for specific incoming calls.

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



Add a Priority Alert

1. Click on the [Add](#) button to open the criteria dialog.
2. **Description:** Type a short title for this alert. (E.g., Priority 1, Low Priority, etc.)
3. Select, set, or define the following options, as needed:
 - ❖ Use Priority Alert – Click the radial button to enable/disable.
 - ❖ Do Not Use Priority Alert – click the radial button to enable/disable.
 - ❖ Select a Time Schedule or Holiday Schedule from the available drop-down menu options.
 - ❖ Any External Phone Number – click to enable /disable .
 - ❖ Following Phone Numbers – click to enable /disable .
 - ❖ Any Private Number – enable /disable .
 - ❖ Any Unavailable Number – click to enable /disable .
 - ❖ Specific Phone Numbers – enter up to 12 (twelve) 10-digit numbers that will be included for the alert.
4. Click on the [Save](#) button to submit the new *Priority Alert* and return to [Settings](#).



Activate a Priority Alert

1. Click to place a checkmark in the [Active](#) box next to a Priority Alert listing to activate it.

Edit a Priority Alert

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

Delete a Priority Alert

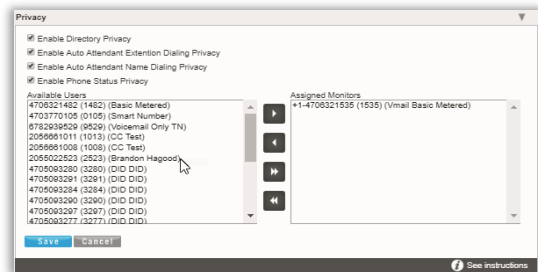
1. Click on the [Edit](#) link next to the appropriate Priority Alert listing to open its *Edit* view.
2. Click on the [Delete](#) button to remove the Priority Alert from the system.
Wait for the Deleted Successfully! message.
3. Close the dialog to return focus the *Priority Alert* list.
4. Click on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

Privacy

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

Manage Privacy

1. Click to enable or disable the following options, as needed:
 - ❖ Enable Directory Privacy
 - ❖ Enable Auto Attendant Extension Dialing Privacy
 - ❖ Enable Auto Attendant Name Dialing Privacy
 - ❖ Enable Phone Status Privacy
2. Use the ◀ ▶ arrows to move highlighted users to/from the Available Users (cannot see your status) and Assigned Monitors (can see your status) sections, as needed.
3. Click the [Save](#) button to update the system with the new information and close the *Edit* view.

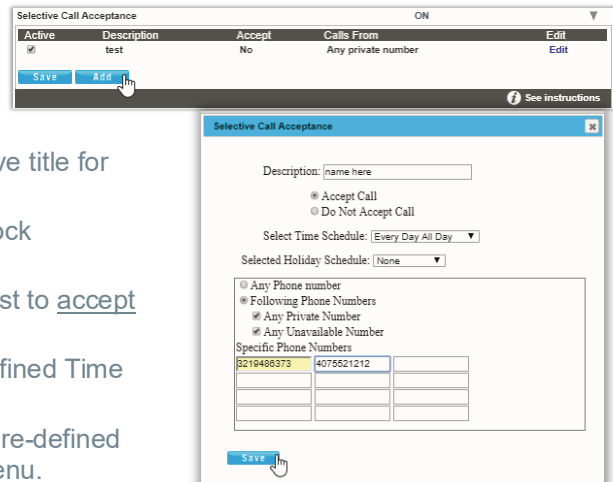


Selective Call Acceptance

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

Add a Selective Call Acceptance List

1. Click on the [Add](#) button to open the criteria view.
2. Define the following criteria options, as needed:
 - ❖ Description – Required: A short descriptive title for this call block type.
 - ❖ Accept Call – Click to setup this list to Block Calls when your criteria are met.
 - ❖ Do Not Accept Call – Click to setup this list to accept specific calls when the criteria are met.
 - ❖ Select Time Schedule – Choose a pre-defined Time Schedule from the drop-down menu.
 - ❖ Selected Holiday Schedule – Choose a pre-defined Holiday Schedule from the drop-down menu.



- ❖ Any Number – Select if any number dialed in will be accepted or blocked.
 - ❖ Following Phone Numbers – Select to define individual numbers to accept or block.
 - ❖ Any Private Number – Select to trigger for incoming calls with “Private” Caller ID.
 - ❖ Any Unavailable Number – Select to trigger for incoming calls with “Unavailable” Caller ID.
 - ❖ Specific Phone Numbers – Select and enter up to twelve (12) 10-digit phone numbers.
3. Click the [Save](#) button when finished to submit the changes and close the *Edit* view.

Edit a Selective Call Acceptance List

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

Delete a Selective Call Acceptance List

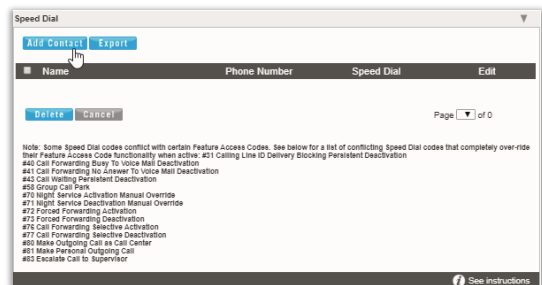
1. Click on the [Edit](#) link next to the appropriate listing.
2. Click on the [Delete](#) button and wait for the **Deleted Successfully** message.
3. Click on the Exit icon to return to the list.
4. Click on the [Save](#) button to update the information and return to [Settings](#).

Speed Dial

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

Add a Speed Dial Contact

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



Edit a Speed Dial Contact

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

Delete a Speed Dial Contact

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

Export Speed Dial Contact List

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

Call Forwarding

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

Set Call Forwarding Number(s)

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

Edit Call Forwarding Numbers

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

Delete Call Forwarding Numbers

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

Call Forwarding Selective

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

Name	Active	Edit	Delete
test	Yes	Edit	Delete

Add a Call Forwarding Selective List

1. Click within the radial button ☉ to turn **ON** /enable or **Off** to disable (default).
2. Enter the Default Call Forward To number (10-digits, no spaces or special characters).
3. Click within the check box to enable Play Ring reminder when a call is forwarded.
4. Click the **Save** button to update the system and close the dialog.
5. Reopen the Call Forwarding Selective *Edit* view to see the updated listing.
6. Click the **Add** button to define the selective forwarding trigger criteria.
7. Enter or select from the following:
 - ❖ Description: Type a short description or title for review in lists.
 - ❖ Forward To: Select an option from those you defined (see steps 1-4 above) using the drop-down menu.
 - ❖ Selected Time Schedule: Select a pre-defined Time Schedule using the drop-down menu.
 - ❖ Calls From: Select an option using the drop-down menu (enter up to twelve (12) 10-digit number(s) below if *From Following* is selected)
 - ❖ Click within the radial buttons ☉ to include forwarding to the default number for Anonymous caller ID and/or Unavailable caller ID.
 - ❖ From Following: Enter up to twelve (12) 10-digit numbers in the fields provided.
8. Click the **Save** button to submit the data and close the view.
Optional: Repeat these steps to create multiple lists with alternative trigggers or schedules.

Edit a Call Forwarding Selective List

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

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

Delete a Call Forwarding Selective List

Caution: This action is immediate and cannot be undone.

1. Click on the [Delete](#) link next to the desired listing to instantly remove the selected listing.

Find Me – Simultaneous Ring

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

Setup Find Me – Simultaneous Ring Numbers

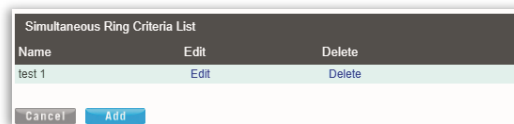
1. Click within the appropriate radial button to turn **ON** ☉ or Off (default).
2. Do not ring my simultaneous ring numbers if I'm already on a call: Click to place a check in the box to enable.
3. Phone Number / SIP URI: Enter up to ten (10) phone or SIP URI numbers in the fields provided.
4. Answer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

Setup Find Me – Simultaneous Ring Triggers

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

Edit Find Me – Simultaneous Ring

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



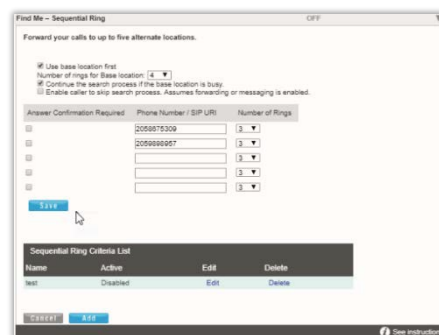
Delete Find Me – Simultaneous Ring

Caution: This action is immediate and cannot be undone.

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

Find Me – Sequential Ring

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

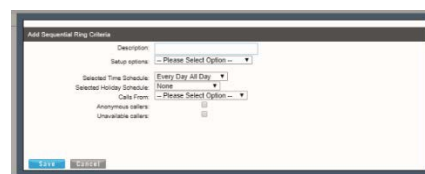


Setup Find Me – Sequential Ring

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

Setup Find Me – Sequential Ring Triggers

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

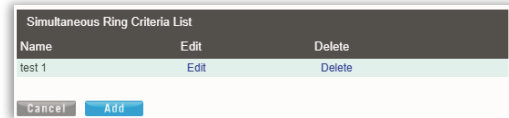


menu to choose a predefined holiday schedule.

- ❖ **Calls From:** Use the drop-down menu to choose an option (and enter phone numbers in the fields provided below if **Following Phone Numbers** is selected).
 - ❖ **Anonymous Callers:** Click to add a check in the box to enable.
 - ❖ **Unavailable Callers:** Click to add a check in the box to enable.
4. Click on the **Save** button when finished to submit the trigger criteria and return to **Settings**.

Edit Find Me – Sequential Ring

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



Delete Find Me – Sequential Ring

Caution: This action is immediate and cannot be undone.

1. Click the **Delete** link next to a list item.
2. Click the **Save** button to update the list and return to **Settings**.

Push to Talk

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

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



Manage Push To Talk

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

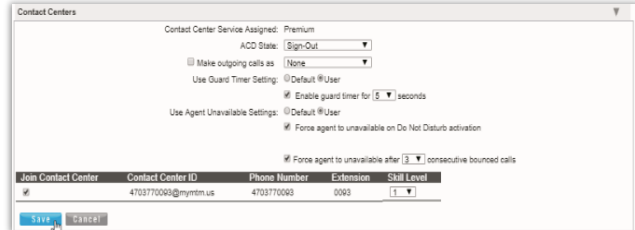
Contact Centers

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

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

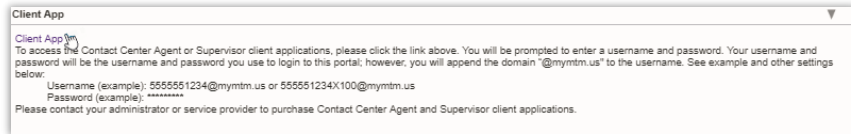
Manage Contact Center Settings

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



Client App

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

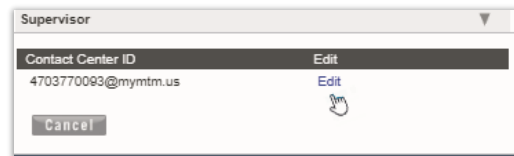


Supervisor

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

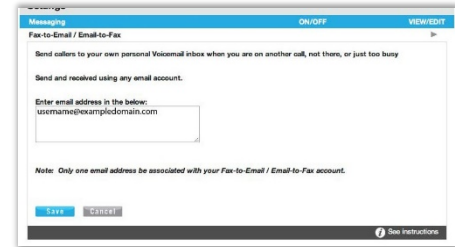
Manage Supervisor Settings

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



Fax-to-Email / Email-to-Fax

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

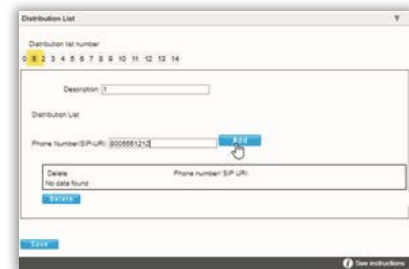


Voicemail

See [Voicemail](#).

Distribution List

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



Manage Distribution List

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

Reset Voicemail Pin

See [Reset Voicemail Pin](#).

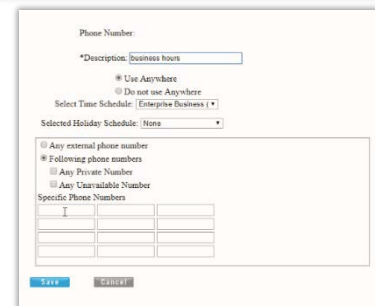
Anywhere

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



Setup Anywhere

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



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

Edit Anywhere

- Click on the [Edit](#) link next to the Anywhere listing.
- Make changes to the *Phone Number* or *Selective Criteria* settings, as needed.
- Click the [Save](#) button(s) to submit the changes and close.

Delete Anywhere

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

- Click to place a check in the box next to the desired listing.
- Click on the [Delete](#) button to remove the listing and return to [Settings](#).

Remote Office

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

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

Manage Remote Office

- Click to toggle the service **ON** or OFF.
- Remote Phone Number: Enter a 10-digit phone number.
- Click on the [Save](#) button.

Enterprise Directory

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

Print Enterprise Directory Summary

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

Print Enterprise Directory Details

Click on the [Enterprise Directory Details](#) link to view a detailed print-ready phone list.

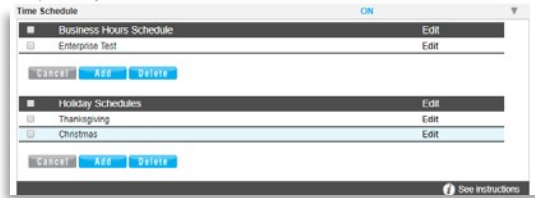
Name	Phone Number	Extension	Department	Mobile	E-mail Address	Group ID
310001951-02-Default (Callboxes - Audio)						3100001951-02
310001951-03-Default (Callboxes - Audio)						3100001951-03
310001951-04-Default (Callboxes - Audio)						3100001951-04
310001951-05-Default (Callboxes - Audio)						3100001951-05
Auto-Attendee 1360204 (Auto-Attendee)	4705032142	1472				3100001951-01
Auto-Attendee 1360271 (Auto-Attendee)	4705032086	2086				3100001951-01
BroadWorks Anywhere 1360287 (BroadWorks Anywhere)	4705021011	1011				3100001951-01
Callboxes Bridge 1360282 (Callboxes - Audio)	4705021490	1490				3100001951-01
Conference 1360281 (MeetMe Conferencing)	4705022002	2002				3100001951-01
DID.DID	4705080280	8280				3100001951-02
DID.DID	4705080281	8281				3100001951-02
DID.DID	4705080284	8284				3100001951-02

Time Schedule

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

Add a Schedule

1. Click to place a checkmark next to the item.
2. Click the [Add](#) button for that option.
3. Enter a unique Schedule Name.
4. Click the [Save](#) button when finished.



View a Schedule

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

Delete a Schedule

Use caution. This action removes the schedule and any underlying events and cannot be undone.

1. Click within the checkbox adjacent to a *Schedule* to select it.
2. Click on the [Delete](#) button within that section to remove the Schedule and any events within it.

Add an Event

1. Click to place a checkmark next to the preferred schedule option (Business Hours or Holiday).
2. Click [Add Event](#).
3. Event Name – Type a short title for review in lists.
4. Define the following options as needed for a specific event type:
 - ❖ Start Date – select the date the event begins.
 - ❖ Select the All Day Event checkbox , OR define the following:
 - ❖ Start Time, End Time, and/or End Date
 - ❖ Recurs – Select from Never, Daily, Weekly, Monthly by Day, Monthly by Week, Yearly by Day, Yearly by Week
 - ❖ Recur every X (Months or Year and/or the Numerical day of the month).
 - ❖ End – Select from *Never*, *After (x # of occurrences)*, or *Date* (and set the end date).
5. Click [Save](#) when finished to submit the data and return to [Settings](#).

Edit an Event

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

Delete an Event

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

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