



# Hosted VoIP Phone System

**Blue Platform**

## Admin Portal Guide for Group Administrators



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## **1 About this Guide**

The Hosted VoIP Phone System Admin Guide for Group Administration is designed to help Group Administrators manage all functions for the Hosted VoIP Phone System Application Server.

Enterprise Administrators should refer to the Hosted VoIP Phone System Admin Portal Guide for Enterprise Administrators for information regarding Enterprise level configuration settings.

The Hosted VoIP Phone System Administration will herein be referred to as: VoIP Administration Portal, VoIP Admin Portal, or Admin Portal.

Note: Services and features available in this guide will only be available in your Hosted VoIP Admin Portal if your Enterprise/Group/User subscribes to the feature. Please contact a Telesystem Business Relations Representative to add a service or feature to your Hosted VoIP Phone System.

## 2 Accessing the Hosted VoIP Phone System Admin Portal

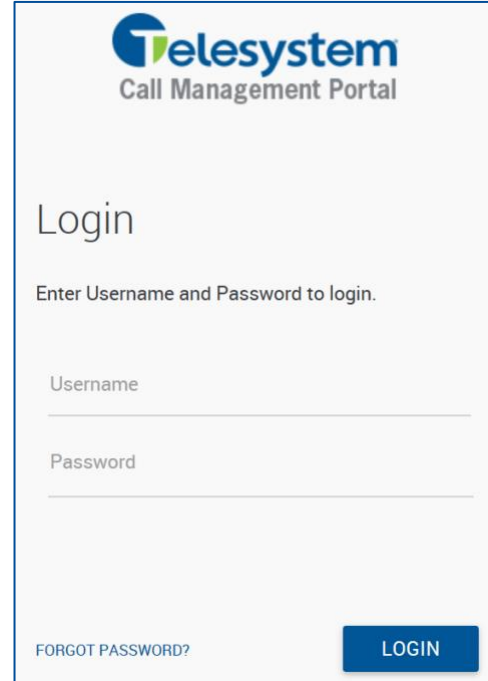
You may access the Hosted VoIP Phone System Admin Portal by navigating to <https://admin.euserportal.com> on your web browser.

Once you're presented with the login page, enter your Username and Password.

Click **Login**.

Your initial login credentials will be provided by Telesystem.

If you have forgotten your password, click the "**Forgot Password?**" link.



The login page features the Telesystem logo and 'Call Management Portal' text at the top. Below this is a 'Login' heading followed by the instruction 'Enter Username and Password to login.' There are two input fields: 'Username' and 'Password'. At the bottom left is a link for 'FORGOT PASSWORD?' and at the bottom right is a blue 'LOGIN' button.

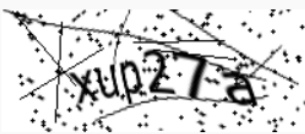
### Password reset

Please enter the information below to reset your password.

\* indicates required field.

Current E-mail address \*

Please enter your user ID \*



Enter symbols you see above \*

RESET

Enter your e-mail address and User ID (Username) in the fields provided.

Enter the symbol information provided to you in the image.

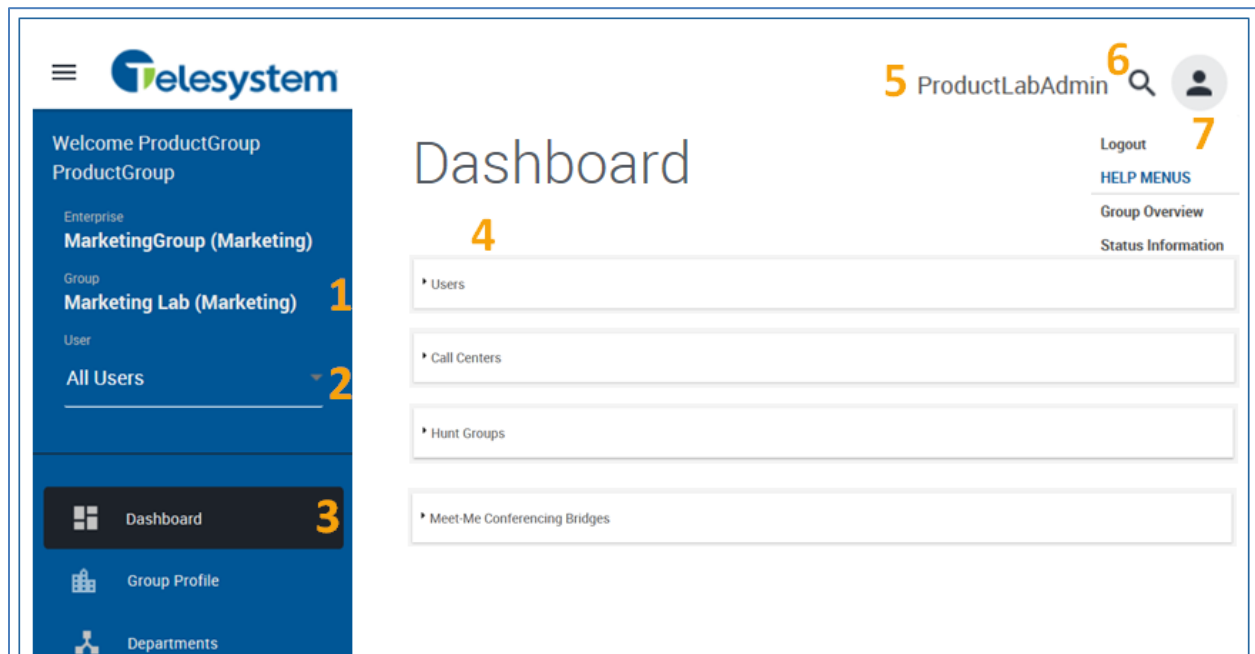
Click **Reset**.

The system will email you a password reset option using Completely Automated Turing test to tell Computers and Humans Apart (CAPTCHA) technology.



### 3 Hosted VoIP Admin Portal Interface (Group Administrators)

Once you've logged into the portal, you will be presented with the following interface:



#### Navigation Menu
















1	<b>Name</b>	Indicates the name of the enterprise and group currently logged into.
2	<b>Navigation Drop-down Menu</b>	This drop down menu allows you to navigate from the group, directly to an individual user.
3	<b>Navigation Tabs</b>	These tabs will allow you to navigate between the different sections available based on the group you're currently logged into. The tabs will change if you select a specific user. Some tabs may contain additional menu options.
4	<b>Dashboard</b>	This is the initial tab you're presented with when logging in as a Group Administrator. This allows for quick access to the areas or functions used most often.
5	<b>Username</b>	Displays the logged in username.
6	<b>Search</b>	Generates a menu to find a specific group or user
7	<b>Profile Drop-down Menu</b>	This dynamic drop-down menu allows the option to logout or seek instructions for certain functions. Instructions available are dependent upon the area of the Admin Portal currently accessed.

## 4 Dashboard

The Dashboard is the first tab presented to you when logged into the Group Admin Portal. It contains the Users, Call Centers, Hunt Groups, and Meet-Me Conferencing modules. This allows for quick access to the settings managed most within the Group Admin Portal.


### 4.1 Dashboard – Users


The Users module displays all the users within the group sorted by last name. This section allows for access to each user’s Status, Name, Phone Number, Calls, Settings, and Phone information.







▼ Users					
			Search (TN or Ext):	GO	
STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS	PHONE
	<a href="#">Dixon, Jay</a>	4199442071 (x2071)	<a href="#">No calls</a>		
	<a href="#">Michaels, Bridgette</a>	4199442073 (x2073)	<a href="#">No calls</a>		
	<a href="#">Smith, Jamie</a>	4199442070 (x2070)	<a href="#">No calls</a>		
	<a href="#">Snow, Jonathon</a>	4199442074 (x2074)	<a href="#">No calls</a>		
	<a href="#">Stevens, Amy</a>	4199442072 (x2072)	<a href="#">No calls</a>		
Displaying 5 of 5 users					

#### 4.1.1 User Status

The User Status tab provides a snapshot of an individual user’s current configuration.

A  indicates the user is unavailable on at least one registered endpoints. A registered endpoint may include a desk phone, the Telesystem Softphone mobile client, or desktop client.

A  indicates the user is available on all registered endpoints.

▼ Users					
			Search (TN or Ext):	GO	
STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS	PHONE
	<a href="#">Dixon, Jay</a>	4199442071 (x2071)	<a href="#">No calls</a>		
	<a href="#">Michaels, Bridgette</a>	4199442073 (x2073)	<a href="#">No calls</a>		

The following information is available in the Status section:

<b>Active Services</b>									
No active Services									
<b>Lines Information</b>									
ONLINE?	LINE/PORT	ENDPOINT TYPE	PRIMARY?	DEVICE INFO					
Yes	4199442072@combuckeye.com	Primary	Yes	Name: 4199442072 Type: Polycom-450 See Device column for lines list					
No	4199442072PC@combuckeye.com	SCA	Yes	Name: 4199442072PC Type: Business Communicator - PC Device Lines:					
				<table> <tr> <th>PHONE</th><th>LINE/PORT</th><th>NAME</th><th>ENDPOINT TYPE</th><th>PRIMARY?</th></tr> </table>	PHONE	LINE/PORT	NAME	ENDPOINT TYPE	PRIMARY?
PHONE	LINE/PORT	NAME	ENDPOINT TYPE	PRIMARY?					
No	4199442072Mobile@combuckeye.com	SCA	Yes	Name: 4199442072Mobile Type: Business Communicator - Mobile Device Lines:					
				<table> <tr> <th>PHONE</th><th>LINE/PORT</th><th>NAME</th><th>ENDPOINT TYPE</th><th>PRIMARY?</th></tr> </table>	PHONE	LINE/PORT	NAME	ENDPOINT TYPE	PRIMARY?
PHONE	LINE/PORT	NAME	ENDPOINT TYPE	PRIMARY?					

#### Status Information

<b>Active Services</b>	Displays any active features that would defer a call, such as <b>Call Forward</b> or <b>Simultaneous Ring</b> . If no services are activated, this will display <b>No Active Services</b> .
<b>Online?</b>	Indicates whether or not the hosted station endpoint assigned to the user is online.
<b>Line/Port</b>	Displays the user's assigned line information.
<b>Endpoint Type</b>	Indicates where the currently assigned endpoint resides in the Hierarchy for the user.
<b>Primary?</b>	Indicates if the endpoint is the primary endpoint for the user. Indicators are <b>Yes</b> and <b>No</b> .
<b>Device Info</b>	Displays information for the endpoint including name, make, and model.

Only registrations assigned to the user will display. For example, if a user has a desk phone and the softphone mobile client, the registration for the desktop PC client will not be displayed within the status information.





### 4.1.2 User Name

The **Name** tab allows you to update a user's name and passwords.

- Changes to the user's **name** on all their applications as well as the inter-enterprise outbound caller ID.
- Changing a user's **password** will update the user's application password used for accessing their web portal and other Telesystem applications such as UC-One, Call Center, and Receptionist Console. Application passwords must contain at least 12 alpha numeric characters including at least one upper-case letter, lower-case letter, number, and special character.
- Changing a user's **Passcode** will update the user's voicemail password\*. Voicemail passwords must contain 4-8 numbers.

To update any of the fields, simply type in the new data. When finished, click the **Save** button.

When updated the password or passcode, dots will display when typing. Alternately, the *Show/Hide* option allows you to display the characters as you are typing them. Both the New and Confirm fields for the password and passcodes must match prior to saving. If you do not have a specific password or passcode to use, you can click *Generate* to ask the system to create a new password. Be sure to then click *Show/Hide* to display the new password or passcode that the system has created for the user. The system will not automatically notify the user their password has been reset, nor are they required to change their password when logging in.

STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS	PHONE
	 <u>Dixon, Jay</u>	4199442071 (x2071)	<u>No calls</u>		
<div> <div> <b>Name</b> </div> <div> <b>Password</b> </div> <div> <b>Passcode</b> </div> </div>					
<div> <div> Last Name Dixon </div> <div> New password ●●●●●●●●●● </div> <div> New passcode 123456 </div> </div>					
<div> <div> First Name Jay </div> <div> Confirm password ●●●●●●●●●● </div> <div> Confirm passcode 123456 </div> </div>					
<div> <div>SAVE</div> <div>CANCEL</div> <div>SHOW/HIDE</div> <div>GENERATE</div> <div>SHOW/HIDE</div> <div>GENERATE</div> </div>					

Click the **Save** button when finished making any changes. Click **Cancel** to discard changes.








\*Some legacy voicemail users utilize third party voice messaging services. If this is the case, the voicemail password is managed elsewhere (see section 5.5.1 of [the user guide](#) for more information on third party voice messaging).

#### 4.1.3 User Phone Number


The Phone Number tab displays the 10 digit Direct-Inward Dial phone number and/or extension of the user. Clicking on this tab will not change the display. There is no additional information to display.




#### 4.1.4 User Calls


The Calls tab will display recent calls logged by the system for the user. When you click on the No Calls tab, you will see a message stating **No Recent Calls**, if there have been no new calls. If there were recent calls, you will see the last three calls, the phone number, date and time, and whether the call was inbound or outbound. There will also be a link to View Call Details, which will open a new tab, or browser window with direct access to that user's full call detail records.


STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS	PHONE
	<a href="#">Dixon, Jay</a>	4199442071 (x2071)	 <a href="#">No calls</a>		
	#	DATE AND TIME	TYPE		
	+14199442073	11/17 4:52PM	inbound		
	+14199442072	11/17 4:45PM	inbound		
	+14199442072	11/17 4:45PM	inbound		


#### 4.1.5 User Settings


The User Settings tab is marked with the settings  icon. The user settings tab provides you with quick access to some of the most used call control features. A **View All Services** link is available, which will open a new tab or browser window which provides access to the user's full profile. The available features will vary depending on the licensed package assigned to the user.


STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS	PHONE
	<a href="#">Dixon, Jay</a>	4199442071 (x2071)	<a href="#">No calls</a>		


**Call Forwarding Always**  
☐ On ☒ Off  
4192345678

**Call Forwarding Busy**  
☐ On ☒ Off  
5675551122

**Call Forwarding No Answer**  
☐ On ☒ Off

**Sequential Ring**  
Service is Off  
Number of Rings: 3

**Do Not Disturb**  
☐ On ☒ Off

**BroadWorks Anywhere**  
Service is Off




SAVE CANCEL


VIEW ALL SERVICES

Click the **Save** button when finished making any changes. Click **Cancel** to discard changes.

#### 4.1.6 User Phone

The Phone tab displays information about the hosted station phone assigned to the user.

STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS	PHONE
	<a href="#">Dixon, Jay</a>	4199442071 (x2071)	<a href="#">No calls</a>		



**Device Type:** Polycom-450  
**Device Name:** 4199442071  
**MAC Address:**  
**Primary Line/Port:** 4199442071@combuckeye.com

NAME	LINE/PORT	USER ID	EXTENSION	TYPE
Dixon, Jay	4199442071@combuckeye...	4199442071	2071	Primary

The information provided includes:

<b>Device Type</b>	Make and model number of the device
<b>Device Name</b>	This will typically show the phone number that has been assigned
<b>MAC Address</b>	This may show the Media Access Control Address assigned to the device
<b>Primary Line/Port</b>	Displays the primary line information for the user in a fully qualified domain format
<b>Name</b>	The user's name in Last name, First name format
<b>User ID</b>	Phone number assigned to the user and device
<b>Extension</b>	Extension assigned to the user for intergroup calling
<b>Type</b>	Indicates where the device falls in the hierarchy

## 4.2 Dashboard – Auto Attendants

The Auto Attendants module of the Dashboard will only be available if you have one or more Auto Attendants assigned to your group. Similar to the User module, the Auto Attendants module contains tabs for Status, Name, Number, Calls, and Settings.

### 4.2.1 Auto Attendants Status

The Status tab does not provide any details.

### 4.2.2 Auto Attendants Name

The Name tab provides access to change the name of the auto attendant and the Calling Line ID (CLID) appearance (First Name and Last Name) for calls generated from the attendant.

Click the **Save** button when finished making changes. Click **Cancel** to discard your changes.






### 4.2.3 Auto Attendants Phone Number

The Phone Number displays the DID number and/or extension assigned to the selected auto attendant. This tab cannot be configured.

#### 4.2.4 Auto Attendants Calls

The Calls tab will display the three most recent calls for the auto attendant. The information will display the other party's phone number or extension, date and time of the call, and whether it was an inbound or outbound call. If there are no recent calls, it will display **No Recent Calls**.

A **View Call Details** link is available. When selected, you will be directed to a new tab or browser window to view a more detailed record.

STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS
	<u>4197249898 Lab Build</u>	 5676610740 (x0740)	 	
<div>BUSINESS HOURS   AFTER HOURS   HOLIDAY HOURS</div> <div><div>Business Hours:</div><div>4197249898OpenHours</div></div>				

#### 4.2.5 Auto Attendants Settings

Each auto attendant has three menus that may be used: Business Hours, After Hours, and Holiday Hours. The Settings tab provides immediate access to each menu's schedule, greeting, and primary menu options.

Click on the menu name to manage its configuration. The selected menu's name will be underlined in orange. All of its primary settings may be modified in this section as explained below.

##### **Business Hours:**

The selected schedule for when this menu is in use will show in the *Business Hours* drop down. An alternate, existing schedule may be chosen instead from the dropdown.

See section 5.2 for more information about schedules.



**Business Hours Dialing Menu:**

The press options included in the selected menu can be managed in the Business Hours Dialing Menu. This section determines what key 0-9, #, and \* will do if the caller presses the options during this menu's use. For more information about each of these menu options, see section the explanation 8.1.

If any changes are made, be sure to click **Save** at the bottom of the section.

Additionally, click

the **DETAILED SETTINGS** link to navigate directly to more in depth settings for the auto attendant. These settings are explained in section 8.1 of this guide.

KEY	DESCRIPTION	ACTION	DETAILS
0	Repeat	Repeat Menu	▼
1	Commercial	Transfer Without Prompt	▼ 5676610976
2	Residential	Transfer With Prompt	▼ 4197249800
3		---	▼
4	Goto Name Search	Name Dialing	▼
5		---	▼

## 4.3 Dashboard – Call Centers




The Call Centers module of the Dashboard will only be available if you have one or more Call Centers assigned to your group. Similar to the User module, the Call Centers module contains tabs for Status, Name, Number, Calls, and Settings.

### 4.3.1 Call Center Status

The Call Center Status tab does not perform any action.

### 4.3.2 Call Center Name

The Name tab will provide access to change the name of the call center and the Calling Line ID (CLID) appearance (First Name and Last Name) for calls generated from the Call Center.

STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS
	<u>Marketing CC 2</u>	4199442077 (x2077)		

**Name**

Name:

Marketing CC 2

---

CLID First Name:

Marketing

---

CLID Last Name:

CC

---




SAVE

CANCEL

Click the **Save** button when finished making changes. Click **Cancel** to discard changes.

#### 4.3.3 Call Center Phone Number







The Phone Number tab displays the DID number and/or extension assigned to the particular Call Center. A Call Center with no phone number or extension assigned will show “**none**”. There’s no other information available or options to change in this tab.

STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS
	<u>Marketing CC 2</u>	4199442077 (x2077)		

#### 4.3.4 Call Center Calls

The Calls tab will display the last three calls logged by the system for the Call Center. If there are no recent calls, it will display **No Recent Calls**. The call information will display other party’s phone number or extension, date and time of the call, and whether it was an inbound call or outbound call.




A **View Call Details** link is available. When selected, a new tab or browser window will open allowing you to generate more detailed call detail reports and records.

STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS
	<u>Marketing CC 2</u>	4199442077 (x2077)		
		#	DATE AND TIME	TYPE
	Unavailable		12/22 9:08AM	inbound
	4197243887		12/1 1:52PM	outbound
	+14192592000		12/1 1:52PM	inbound

VIEW CALL DETAILS

#### 4.3.5 Call Center Settings

The Call Center Settings tab provides immediate access to the Group Policy, Call Center Routing Policies, and assigned Agents and Supervisors to the Call Center.

STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS
	<u>Marketing CC 2</u>	4199442077 (x2077)		

**Group Policy**

- ☐ Circular
- ☒ Regular
- ☐ Simultaneous
- ☐ Uniform
- ☐ Weighted Call Distribution [\[Edit\]](#)

**Call Center Routing Policies**

Overflow Action:

- ☐ Enable overflow after calls wait: 30 seconds
- ☒ Perform busy treatment
- ☐ Transfer to phone number:
- ☐ Play ringing until caller hangs up

A **Detailed Settings** link is available, which will open a new tab or web browser allowing access to advanced Call Center Settings.

Agents	
Available Users	Assigned Users
	Michaels, Bridgette (4199442073) Smith, Jamie (4199442070) Dixon, Jay (4199442071) Stevens, Amy (4199442072) Snow, Jonathon (4199442074)
	<div>ADD &gt;</div> <div>&lt; REMOVE</div> <div>ADD ALL &gt;&gt;</div> <div>&lt;&lt; REMOVE ALL</div>
<div>MOVE UP</div> <div>MOVE DOWN</div>	

Supervisors	
Available Supervisors	Assigned Supervisors
Dixon, Jay (4199442071) Smith, Jamie (4199442070) Snow, Jonathon (4199442074) Stevens, Amy (4199442072)	Michaels, Bridgette (4199442073)
	<div>ADD &gt;</div> <div>&lt; REMOVE</div> <div>ADD ALL &gt;&gt;</div> <div>&lt;&lt; REMOVE ALL</div>
<div>SAVE</div> <div>CANCEL</div> <div>DETAILED SETTINGS</div>	

Click **Save** after making any changes. Click **Cancel** to discard any changes you wish not to keep.

#### 4.3.5.1 Call Center Group Policy

The following options are available for setting the Group Policy for a Call Center:

<b>Circular</b>	Incoming calls hunt through agents in the order they appear on the list, starting with the agent following the last agent to receive a call. When the search reaches the end of the list, it loops back to the top and continues until it has tried all users. After the system has tried all agents, a forward number must be setup in the <b>No Answer</b> field to route calls or calls will hear a ringing tone followed by a message indicating <b>all circuits are busy</b> .
<b>Regular</b>	Incoming calls hunt through agents in the order they appear on the list, starting from the top each time.
<b>Simultaneous</b>	Incoming calls alert all agents at the same time. The first agent to answer handles the call.
<b>Uniform</b>	Incoming calls hunt through all agents in order, starting with the agent who has been idle the longest and ending with the agent who most recently answered a call.
<b>Weighted Call Distribution</b>	Incoming calls are assigned to idle agents based on percentages you assign on the Call Center's Profile Weighted Call Distribution page. The percentages for all agents must add up to 100%. Selecting Weighted Call Distribution and then clicking on the <b>Edit</b> link here will open the Call Center Profile page.

#### Group Policy

- ☐ Circular
- ☐ Regular
- ☐ Simultaneous
- ☐ Uniform
- ☒ Weighted Call Distribution [Edit]

#### 4.3.5.2 Call Center Routing Policies

The Call Center Routing Policies are available for you to determine what action the Call Center should take when a large number of calls have been received or have been waiting longer than a configured threshold.

Available options include:

<b>Enable overflow after calls wait</b> <input type="checkbox"/> <b>seconds</b>	By checking this box and setting the number of seconds, callers will wait in queue until an agent answers the call or the threshold is met. If the threshold is met, one of the overflow actions listed below are taken.
<b>Perform busy treatment</b>	Calls determined to be Overflow Calls, will receive a busy signal.
<b>Transfer to phone number</b>	Selecting this option provides the option to enter a number into a text box where Overflow Calls will be forwarded to. This may be used to send callers to a backup Call Center or messaging system.
<b>Play ringing until caller hangs up</b>	Calls that are designated as Overflow Calls will receive constant ringing but the call will not be distributed to an agent.

The Call Center Detailed Settings link provides you with options to play an announcement before overflow processing. A default announcement can be selected or a custom announcement may be uploaded and played to callers.

### Call Center Routing Policies

Overflow Action:

☐ Enable overflow after calls wait: 30 seconds

☒ Perform busy treatment

☐ Transfer to phone number:

---

☐ Play ringing until caller hangs up

#### 4.3.5.3 Call Center Agents

The Agents section allows you to assign agents to the Call Center. It contains two lists. The **Available Users** list provides a list of users in the group with an Agent License assigned to them. The **Assigned Users** list includes agents currently assigned to the selected Call Center.

Agents	
<b>Available Users</b>	<b>Assigned Users</b>
Stevens, Amy (4199442072)	Michaels, Bridgette (4199442073) Smith, Jamie (4199442070) Dixon, Jay (4199442071) Snow, Jonathon (4199442074)
<div>ADD &gt;</div> <div>&lt; REMOVE</div> <div>ADD ALL &gt;&gt;</div> <div>&lt;&lt; REMOVE ALL</div>	
<div>MOVE UP</div> <div>MOVE DOWN</div>	

You may add an agent to the Call Center by selecting the name on the left in the box labeled **Available Users**, then click **ADD**. This will move the user to the box on the right, labeled **Assigned Users**.

Add all Available Users to the Call Center by selecting the **ADD ALL** button. All users from the Available Users list will be moved to the Assigned Users list.

You may reposition the Assigned Users by selecting the agent you wish to move from the Assigned Users list, then click **MOVE UP** or **MOVE DOWN**. This is helpful when determining which Group Policy to choose. For instance, if you select a Regular Group Policy, the calls will be presented to the agents according to the order of the Assigned Users list, starting from the top of the list for every incoming call to that Call Center. For additional assistance regarding Group Policies, see section 4.2.5.1 *Call Center Group Policy*.

Remove all Assigned Users from the Call Center by selecting **REMOVE ALL**. All users in the Assigned Users list will move to the Available Users list.

#### 4.3.5.4 Call Center Supervisors

The Supervisors section will allow you to assign supervisors to the Call Center. The box on the left labeled **Available Supervisors** will include any users within the group with an assigned Supervisor License. The box on the right labeled **Assigned Supervisors** will include all supervisors currently assigned to the selected Call Center.

Supervisors	
<b>Available Supervisors</b> Dixon, Jay (4199442071) Snow, Jonathon (4199442074) Stevens, Amy (4199442072)	<b>Assigned Supervisors</b> Michaels, Bridgette (4199442073) Smith, Jamie (4199442070)
<div>ADD &gt;</div> <div>&lt; REMOVE</div> <div>ADD ALL &gt;&gt;</div> <div>&lt;&lt; REMOVE ALL</div>	
<div>SAVE CANCEL</div> <div>DETAILED SETTINGS</div>	

Add a supervisor to the Call Center by selecting the user from the Available Supervisors list, then click **ADD**.

Add all Available Supervisors to the Call Center by selecting the **ADD ALL** button. All supervisors from the Available Supervisors list will be moved to the Assigned Users list.

Remove all Assigned Supervisors from the Call Center by selecting **REMOVE ALL**. All supervisors in the Assigned Supervisors list will move to the Available Supervisors list.

Once a supervisor has been assigned to a Call Center, agents may be assigned from the supervisor's personal profile page under the **Call Control** heading through the feature labeled **Call Center – Supervisor** using the **Edit** option.

Selecting the **DETAILED SETTINGS** link will open the Call Center Profile Page. Please refer to *section 8.2 Site Services – Call Center* for information on the settings and configurations available to manage.

Click the **Save** button when finished making changes. Click **Cancel** to discard your changes.



## 4.4 Dashboard – Group Paging




The Group Paging section will be available if you have group paging configured in your group. This section provides access to Status, Name, Phone Number, and Settings tabs for each hunt group. This service allows authorized users (originators) to page a group of users (targets) by dialing an extension.

### 4.4.1 Group Paging Status

The Status tab does not provide any details.

### 4.4.2 Group Paging Name

The Name tab provides access to change the name of the group page and the Calling Line ID (CLID) appearance (First Name and Last Name) for calls generated from a group page originator.

STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS
	<u>Marketing Lab Page</u>	(x9999)		
<b>Name</b>				
Name:				
<input type="text" value="Marketing Lab Page"/>				
CLID First Name:				
<input type="text" value="Marketing"/>				
CLID Last Name:				
<input type="text" value="Lab Page"/>				
<input type="button" value="SAVE"/> <input type="button" value="CANCEL"/>				




Click the **Save** button when finished making changes. Click **Cancel** to discard your changes.

### 4.4.3 Group Paging Phone Number

The Phone Number displays the extension assigned to the group paging. This tab cannot be configured.

### 4.4.4 Group Paging Calls

The Calls tab will display the three most recent calls for the group page. The information will display the other party's phone number or extension, date and time of the call, and whether it was an inbound or outbound call. If there are no recent calls, it will display **No Recent Calls**.

STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS
	<u>Marketing Lab Page</u>	(x9999)		
No Recent Calls				<a href="#">VIEW CALL DETAILS</a>

#### 4.4.5 Group Paging Settings

The Settings tab will direct you to the Group Paging Profile tab to configure settings such as the Paging Group Name, Calling Line ID First Name, Last Name, Time Zone, Paging Group Originators, Targets, and Call Policies. From this page, you may also access the Calling Features, My Calls, and Utilities tabs for the selected paging group. Please refer to section [8.6 Site Services – Group Paging](#) for setting details.

### 4.5 Dashboard – Hunt Groups





The Hunt Groups section will be available if you have hunt groups configured in your group. This section provides access to Status, Name, Phone Number, Calls, and Settings tabs for each hunt group.

#### 4.5.1 Hunt Group Status

The Status tab does not provide any details.

#### 4.5.2 Hunt Group Name

The Name tab provides access to change the name of the hunt group and the Calling Line ID (CLID) appearance (First Name and Last Name) for calls generated from the hunt group.

STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS
	 <a href="#">BMG Hunt Group</a>	4199442075 (x2075)		

**Name**

Name:

BMG Hunt Group

CLID First Name:

Telesystem

CLID Last Name:

Marketing

**SAVE** CANCEL




Click the **Save** button when finished making changes. Click **Cancel** to discard your changes.

#### 4.5.3 Hunt Group Phone Number

The Phone Number displays the DID number and/or extension assigned to the selected hunt group. This tab cannot be configured.

#### 4.5.4 Hunt Group Calls




The Calls tab will display the three most recent calls for the hunt group. The information will display the other party's phone number or extension, date and time of the call, and whether it was an inbound or outbound call. If there are no recent calls, it will display **No Recent Calls**.

STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS
	<a href="#">BMG Hunt Group</a>	4199442075 (x2075)		
No Recent Calls				
<a href="#">VIEW CALL DETAILS</a>				

A **View Call Details** link is available. When selected, you will be directed to a new tab or browser window to view a more detailed record.

#### 4.5.5 Hunt Group Settings

The Settings tab provides immediate access to the Group Policy, No Answer Settings, and Users assigned to the hunt group.

STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS
	<a href="#">BMG Hunt Group</a>	4199442075 (x2075)		

### Group Policy

☐ Circular

☒ Regular

☐ Simultaneous

☐ Uniform

☐ Weighted Call Distribution [\[Edit\]](#)

### No Answer Settings

☒ Skip to next agent after 3 rings

☐ Forward call after waiting 8 seconds

Call forwards to: \_\_\_\_\_

Users	
<b>Available Users</b> Dixon, Jay (4199442071) Snow, Jonathon (4199442074)	<b>Assigned Users</b> Stevens, Amy (4199442072) Smith, Jamie (4199442070) Michaels, Bridgette (4199442073)
<div>ADD &gt;</div> <div>&lt; REMOVE</div> <div>ADD ALL &gt;&gt;</div> <div>&lt;&lt; REMOVE ALL</div>	
<div> <div>SAVE</div> <div>CANCEL</div> <div>DETAILED SETTINGS</div> <div>MOVE UP</div> <div>MOVE DOWN</div> </div>	

#### 4.5.5.1 Group Policy

The following options are available for setting the Group Policy for a Hunt Group:

<b>Circular</b>	Incoming calls hunt through agents in the order they appear on the list, starting with the agent following the last agent to receive a call. When the search reaches the end of the list, it loops back to the top and continues until it has tried all users. After the system has tried all agents, a forward number must be setup in the <b>No Answer</b> field to route calls or calls will hear a ringing tone followed by a message indicating "all circuits are busy".
<b>Regular</b>	Incoming calls hunt through agents in the order they appear on the list, starting from the top each time.
<b>Simultaneous</b>	Incoming calls alert all agents at the same time. The first agent to answer handles the call.
<b>Uniform</b>	Incoming calls hunt through all agents in order, starting with the agent who has been idle the longest and ending with the agent who most recently answered a call.
<b>Weighted Call Distribution</b>	Incoming calls are assigned to idle agents based on percentages you assign on the Call Center's Profile Weighted Call Distribution page. The percentages for all agents must add up to 100%. Selecting Weighted Call Distribution and then clicking on the <b>Edit</b> link here will open the Call Center Profile page.

## Group Policy

- ☐ Circular
- ☐ Regular
- ☐ Simultaneous
- ☐ Uniform
- ☒ Weighted Call Distribution [Edit]

#### 4.5.5.2 No Answer Settings

The No Answer Settings section allows you to configure how the call is managed when users in the hunt group do not answer the call.

There are two options available:

- Skip to the next agent after **X** rings.  
Enabling this option will send the call to the next available user in the hunt group after reaching the predefined number of rings.
- Forward the call after **X** seconds.  
Enabling this option will send the call to a predefined destination after the caller has waited the predefined number of seconds.

### No Answer Settings

☒ Skip to next agent after 3 rings

☐ Forward call after waiting 8 seconds

Call forwards to: \_\_\_\_\_

You may select one, both, or neither of the options when configuring your hunt group.

#### 4.5.5.3 Hunt Group Users

The users section allows you to assign users to the hunt group. It contains two lists. The **Available Users** list provides a list of users in the Enterprise Group. The **Assigned Users** list includes agents currently assigned to the selected hunt group.

Users	
<b>Available Users</b> Dixon, Jay (4199442071) Snow, Jonathon (4199442074)	<b>Assigned Users</b> Stevens, Amy (4199442072) Smith, Jamie (4199442070) Michaels, Bridgette (4199442073)
<div>ADD &gt;</div> <div>&lt; REMOVE</div> <div>ADD ALL &gt;&gt;</div> <div>&lt;&lt; REMOVE ALL</div>	
<div>SAVE CANCEL DETAILED SETTINGS MOVE UP MOVE DOWN</div>	

You may add an agent to the hunt group by selecting the name on the left in the box labeled **Available Users**, then click **ADD**. This will move the user to the box on the right, labeled **Assigned Users**.

Add all Available Users to the hunt group by selecting the **ADD ALL** button. All users from the Available Users list will be moved to the Assigned Users list.

You may reposition the Assigned Users by selecting the agent you wish to move from the Assigned Users list then click **MOVE UP** or **MOVE DOWN**. This is helpful when determining which Group Policy to choose. For instance, if you select a Regular Group Policy, the calls will be presented to the agents according to the order of the Assigned Users list, starting from the top of the list for every incoming call to that hunt group. For additional information regarding Group Policies, please refer to section 4.3.5.1 *Group Policy*.

Remove all Assigned Users from the hunt group by selecting **REMOVE ALL**. All users in the Assigned Users list will move to the Available Users list.

Selecting the DETAILED SETTINGS link will open the Hunt Group Profile Page. Please refer to section 8.6 *Site Services – Hunt Group* for information on the settings and configurations available to manage.

Click the **Save** button when finished making changes. Click **Cancel** to discard your changes.

## 4.6 Dashboard – Instant Group Calls




The Instant Group Calls section is available in the Dashboard if you have an Instant Group Call configured for your Group. This service enables users to call a group of users, where the users can be part of the same group or may also be external users.

### 4.6.1 Instant Group Calls Status

The Status tab does not provide any details.

### 4.6.2 Instant Group Calls Name

The Name tab provides access to change the name of the Instant Group Call and the Calling Line ID (CLID) appearance (First Name and Last Name).

STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS
	<u>ICG Test</u>	(x4567)		

**Name**

Name:

ICG Test

CLID First Name:

ICG

CLID Last Name:

Test

**SAVE** **CANCEL**







Click the **Save** button when finished making changes. Click **Cancel** to discard your changes.

### 4.6.3 Instant Group Calls Phone Number

The Phone Number displays the extension assigned to the Instant Group. This tab cannot be configured.

#### 4.6.4 Instant Group Calls – Calls

The Calls tab will display the three most recent calls for the conference. The information will display the other party's phone number or extension, date and time of the call, and whether it was an inbound or outbound call. If there are no recent calls, it will display **No Recent Calls**.

STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS
	ICG Test	(x4567)		
	#	DATE AND TIME	TYPE	
	+14199442071	11/17 4:52PM	outbound	
	+14199442073	11/17 4:52PM	inbound	
	+14199442072	11/17 4:52PM	outbound	

#### 4.6.5 Instant Group Calls Settings

The Settings tab will direct you to the Instant Group Call Profile tab to configure settings, such as the Password, Instant Group Name, Calling Line ID First Name, Last Name, and Time Zone, Instant Group Call User List, and Call Policies. From this page, you may also access the Calling Features, My Calls, and Utilities tabs for the selected instant group. Please refer to section [8.8 Site Services – Instant Group Call](#) for setting details.

### 4.7 Dashboard – Meet-Me Conferencing

The Meet-Me Conferencing section is available in the Dashboard if you have a Meet-Me Conferencing license assigned to you Enterprise Group. This section provides access to the Meet-Me Conferencing Status, Name, Phone Number, Calls, and Settings.





#### 4.7.1 Meet-Me Conferencing Status

The Status tab does not provide any details.



#### 4.7.2 Meet-Me Conferencing Name

The Name tab provides access to change the name of the conference and the Calling Line ID (CLID) appearance (First Name and Last Name).

STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS
	 <a href="#">Marketing Meet-Me2</a>	4199442079 (x2079)		

**Name**  
Name:  
  
CLID First Name:  
  
CLID Last Name:  
  

**SAVE** **CANCEL**





Click the **Save** button when finished making changes. Click **Cancel** to discard your changes.

#### 4.7.3 Meet-Me Conferencing Phone Number

The Phone Number tab displays the DID and/or extension assigned to the selected conference. This tab cannot be configured.

#### 4.7.4 Meet-Me Conferencing Calls




The Calls tab will display the three most recent calls for the conference. The information will display the other party's phone number or extension, date and time of the call, and whether it was an inbound or outbound call. If there are no recent calls, it will display **No Recent Calls**.

▼ Meet-Me Conferencing Bridges				
STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS
	<a href="#">Marketing Meet-Me2</a>	4199442079 (x2079)	 	
No Recent Calls				
VIEW CALL DETAILS				

A **View Call Details** link is available. When selected, you will be directed to a new tab or browser window to view a more detailed record.

#### 4.7.5 Meet-Me Conferencing Settings

The Settings tab provides immediate access to the most used configurations within the Meet-Me Conference Bridge Profile, such as the number of ports you wish to allocate to this conference, setting a maximum duration and warning prompt alerting you prior to the end of the conference, as well as adding Conference Hosts.

STATUS	NAME	PHONE NUMBER	CALLS	SETTINGS
	<a href="#">Marketing Meet-Me2</a>	4199442079 (x2079)		

Meet-Me Conference Bridge Profile

Maximum Ports Available For This Bridge: 40

\* Allocated Ports To This Bridge:

☒ Allow Individual Outdial

☐ Maximum Conference Duration  hours  minutes

☒ Play Warning Prompt  minutes before the conference end

Maximum Scheduled Conference Duration:  hours  minutes

Available Users		Conference Hosts
Dixon, Jay (4199442071) Snow, Jonathon (4199442074)		Michaels, Bridgette (4199442073) Smith, Jamie (4199442070) Stevens, Amy (4199442072)
	ADD >	
	< REMOVE	
	ADD ALL >>	
	<< REMOVE ALL	
SAVE CANCEL		DETAILED SETTINGS

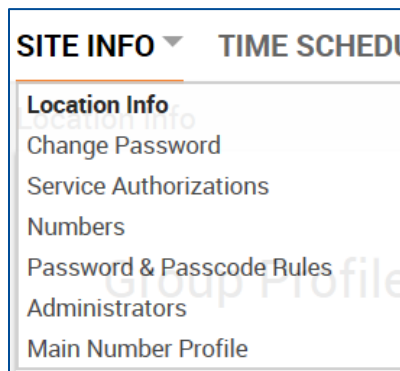
For a full list Meet-Me Conferencing details and configurations, see section [8.9 Site Services – Meet-Me Conferencing](#).

## 5 Group Profile

The Group Profile tab contains the menu options for Site Info, Time Schedules, Holiday Schedules, and Dial Plan Policy.

### 5.1 Site Info

The Site Info menu contains sub-menus, such as Change Password, Service Authorizations, Numbers, Password and Passcode Rules, Administrators, and Main Number Profile.



#### 5.1.1 Location Info

The Location Info menu is the default landing page for the Group Profile tab. This menu is a read only menu for Group Administrators. If you have Enterprise Administrative access, you may update the information here. This page is divided into three sections: **Group Information**, **Group Administrator**, and **Group Dialing Plan**.

The Group Information section contains the following information:

<b>Group ID</b>	Identifier for the group
<b>Group Name</b>	Full name of the group
<b>Current Number of Users</b>	Displays the number of users actually assigned to the group
<b>Default Domain</b>	Shows the domain name for the group used for Hosted VoIP Phone services
<b>Time Zone</b>	Time zone based on the main group location
<b>Address, City, State, Zip Code</b>	Used for the groups primary location

The Group Administrator section contains the name, phone number, and email address for the group administrator.

The Group Dialing Plan defines the Location Dialing Code. This code indicates the digit(s) that must be used prior to using extension dialing for a user in a different group residing under the same enterprise.

The Extension Length defines how many digits are used for extension dialing within the group.

### 5.1.2 Change Password

The Change Password menu allows you to change the password for your Group Administration user profile. Enterprise administrators will not have this submenu option.

In order to change your password, you must enter your current password, then new password, and retype the new password. As you type in the available fields, the characters will show as a series of dots. There is not an option to show or hide the password. The new password must meet current password requirements with an alphanumeric password containing at least one uppercase and one lowercase letter, one number, and one special character (such as !@#\$%^&\*).

**Password reset**

**\* indicates required field.**

Administrator ID: ProductLabAdmin

\*Current Password: .....

\*New Password: .....

\*Retype New Password: .....

SAVE

### 5.1.3 Service Authorizations

The Service Authorizations menu is a read only menu for Enterprise and Group administrators. Here you may view the number of licenses and allocations for each service pack, group service, and user services assigned to your group. You must contact a sales representative if you'd like to make changes to your service.

### 5.1.4 Numbers

The Numbers menu displays a table of all numbers assigned to the group, who the number is assigned to, and if the number is active. Use the drop-down arrows along the right-hand column of the table to assign each number to a specific department.

Search options are available at the top of the page, just below the headers. You may search for an entry by Phone Number, Assigned To, Activated, or Department.

PHONE NUMBERS	ASSIGNED TO	ACTIVATED	DEPARTMENT
Search...	Search...	--Any--	--Any--
<b>SEARCH</b>			
+1-4199442070	Smith,Jamie	yes	Marketing (Marketing) \ Product CC
+1-4199442071	Dixon,Jay	yes	Marketing (Marketing) \ Product CC \ BTS PRODUCT GROUP
+1-4199442072	Stevens,Amy	yes	--None--
+1-4199442073	Michaels,Bridgette	yes	Marketing (Marketing)
+1-4199442074	Snow,Jonathon	yes	Marketing (Marketing) \ Product CC
+1-4199442075	BMG Hunt Group	no	Marketing (Marketing) \ Product CC \ BTS PRODUCT GROUP
			test (Marketing)

### 5.1.5 Password Rules

The Password Rules menu is a list of the current password rules format that includes the type of characters, the number of characters, the frequency with which passwords expire, and how many unsuccessful attempts must occur before a login is disabled. This information cannot be changed by the Enterprise or Group Administrators.

### Password Rules for Users

- ☐ cannot contain the login ID
- ☐ cannot contain the old password
- ☐ cannot be the reverse of the old password
- ☒ must contain at least 1 number(s)

Password Format:

- ☒ must contain at least 1 uppercase alpha character(s)
- ☒ must contain at least 1 lowercase alpha character(s)
- ☐ must contain at least 1 non-alphanumeric character(s)
- ☒ must be at least 12 characters

### 5.1.6 Administrators

This section allows Group Administrators to add, edit, and delete additional group level administrators for the same group. This is only available with a Group Administrator login. Enterprise Administrators cannot access this. If you require Group Administrator credentials, please contact a Telesystem Representative.

To delete a group administrator, choose the administrator from the drop-down box then click the **Delete** button. There is no confirmation for this action. The page will refresh and a notification will display above the drop-down box indicating an administrator has been deleted.

### Administrators

Deleted

ProductLabAdmin

ADDDELETE

To edit an administrator, choose the administrator from the drop-down box. The information for that administrator will populate in the **Edit** fields below the drop-down box. You have access to change First Name, Last Name, Password, and default language for that administrator. Click the **Save** button to save the changes.

## Administrators

ProductLabAdmin

ADDDELETE

### Edit

Administrator ID:  
ProductLabAdmin

Last Name:  
ProductGroup

First Name:  
ProductGroup

New Password:

Re-type Password:

SHOW/HIDE PASSWORD

Language:  
English

Administrator Type:  
Group

SAVE

To add a new administrator, click the **Add** button next to the drop-down box. The new administrator menu will display with the fields needed to create the administrator.

Fill out each field and choose if the administrator will have **Group** or **Department** access in the **Administrator Type** section. If you choose Department access, choose the department from the drop-down list.

Click the **Save** button to complete the creation of the new administrator account.

### New

**\* indicates required field.**

**\* Administrator ID:**

Last Name:

First Name:

**\* Initial Password:**

**\* Re-type Initial Password:**

SHOW/HIDE PASSWORD

Language:  
English

Administrator Type  
☒ Group ☐ Department

Marketing (Marketing)

SAVE CANCEL

### 5.1.7 Main Number Profile

This menu does not display any information or data for Enterprise or Group Administrators.

## 5.2 Time Schedules

The Schedules page is used to view and manage schedules for the group.

Schedules are used in services such as Sequential Ring or Call Forward Selective to specify the time when the service action (ringing the phones or forwarding calls) should take place.

This section allows you to **add**, **modify**, **rename**, and **delete** time schedules.



### 5.2.1 Add a Time Schedule

Click the **Add New Schedule** button.

ADD NEW SCHEDULE

When the **Name** window populates, enter the name of the schedule.

Click the **OK** button.

Name

Please provide name for new schedule:

OKCANCEL

You will be presented with a one week grid where the columns represent the hours of the day and the rows represent the days of the week.

Time Schedules

Business Hours

Test

Product Hours

!

Meeting

12 AM

1 AM

2 AM

3 AM

4 AM

5 AM

6 AM

7 AM

8 AM

9 AM

Monday									
Tuesday									
Wednesday									
Thursday									
Friday									
Saturday									
Sunday									

ADD NEW SCHEDULE

Start the scheduling time by using your mouse to left-click and hold on the start time for the desired day of the week and drag to the desired end time for the day, then release the mouse button. As you drag your mouse, you will see a pop-up notification showing the exact start and stop times for the day you are scheduling.

In the example below, a schedule has been created for a meeting Monday-Friday 8-8:30AM.

The screenshot shows the 'Time Schedules' interface. At the top, there are four tabs: 'Business Hours', 'Test', 'Product Hours', and 'Meeting' (which is active and has a red exclamation mark icon). Below the tabs is a grid with days of the week on the left and time slots from 12 AM to 9 AM on the top. Orange blocks representing the meeting schedule are visible from 8:00 AM to 8:30 AM on Monday through Friday. A tooltip is shown over the Thursday block, displaying a green checkmark, a clock icon, and the times '8:00 AM' and '8:30 AM'. At the bottom of the grid are three buttons: 'SAVE', 'RENAME', and 'DELETE'.

Once you have scheduled time for a day, you can modify the time by clicking on the start or stop boarder of the blocked time, then reassign the time scheduled.

This close-up shows the 'Meeting' tab with a red exclamation mark icon. A tooltip is visible over the 8:00 AM to 8:30 AM block, showing a green checkmark, a clock icon, and the times '8:00 AM' and '9:00 AM'. The grid shows the 7 AM and 8 AM time slots.

Alternatively, you may click on the block of time for the day you wish to modify, which will produce a pop-up window that will allow you to manually enter the start time and end time. When finished, click **Submit**.

Click the **Save** button to keep your changes.

The 'Edit Time Schedule' pop-up window has a close button (X) in the top right corner. It contains two input fields: 'Start time: 08 : 00 AM' and 'End time: 09 : 00 AM'. A 'MIDNIGHT' button is next to the end time field. At the bottom are two buttons: 'SUBMIT' and 'CLOSE'.

### 5.2.2 Editing a Time Schedule

You may view the available schedules by clicking on the name of the schedule at the top of the Time Schedules section.

The screenshot shows the 'Time Schedules' section with a yellow arrow pointing to the 'Business Hours' tab. The interface displays a calendar grid for the week of Monday to Sunday. The time slots are labeled from 12 AM to 3 PM. The 'Business Hours' schedule is shown as orange blocks from 8 AM to 12 PM on Monday through Thursday, and from 7 AM to 1 PM on Friday. At the bottom, there are buttons for 'ADD NEW SCHEDULE', 'SAVE', 'RENAME', and 'DELETE'.

To edit a schedule, click the schedule's name you wish to edit.

Modify the times and days scheduled by clicking on the start and/or end times for the scheduled blocks. You may also click on the time block to produce the pop-up window that can be used to manually enter the desired time blocks.

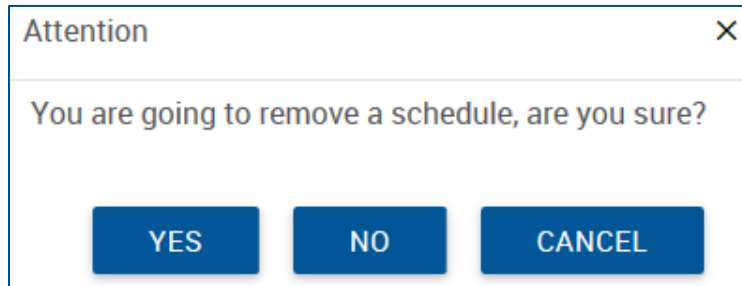
To delete an entire block of time, right-click on the block of time then click **Delete event**.

The screenshot shows a pop-up window with a header containing time slots: 8 AM, 9 AM, 10 AM, 11 AM, and 12 PM. Below the header are four orange blocks representing scheduled time slots. A 'Delete event' button is visible at the bottom right of the window.

You may also rename the schedule by clicking the **Rename** button to populate the Name window. Make your desired changes, then click **Save**.

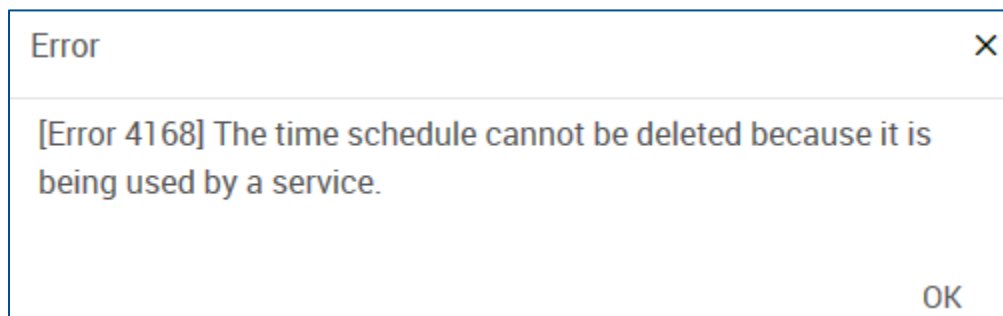
### 5.2.3 Deleting a Time Schedule

To delete a schedule, click the desired schedule using the name tabs at the top of the Time Schedules menu. Click the Delete button. When the Attention window populates asking you to confirm the action, click **Yes**.



The page will refresh and the schedule will no longer be available.

If the schedule is currently in use (assigned to a feature), you may not delete the schedule. You will receive an error stating: **[Error 4168] The time schedule cannot be deleted because it is being used by a service.** To delete this schedule, locate the feature using this schedule and disable it or assign a different schedule. You will then return to the Group Profile to delete it.



## 5.3 Holiday Schedules

Similar to Time Schedules, Holiday Schedules may be configured and assigned to features such as Sequential Ring and Call Forward to manage call routing during defined holidays. This page will allow you to add, edit, and delete a Holiday Schedule.

### 5.3.1 Add a Holiday Schedule

To add a new Holiday Schedule:

1. Click the **Add Holiday Schedule** button.
2. The Add Holiday Schedule window will populate which is divided into columns labeled **Holiday**, **Date Start**, **Date End**, and **Recurrence**.
3. Enter a name for the schedule at the top in the field labeled **Holiday Schedule Name**.
4. Enter a name for the Holiday in the column labeled **Holiday**.
5. Enter the **Date Start** for that holiday in the following format: MM/DD/YYYY or use the calendar icon to select a date.
6. Enter the **Date End** for that holiday in the following format: MM/DD/YYYY or use the calendar icon to select a date.

7. Set the **Recurrence** for the holiday. The recurrence options are **None** (never recurs), **Indefinite** (recurs annually forever), or **Limited** (recurs annually for a given amount of years). If you choose Limited, a new column will appear with a **To Date** field. Enter the date when you would like this holiday to stop occurring in the MM/DD/YYYY format or use the calendar icon to select a date.
8. Click the **Save** button to keep your changes.

Edit Holiday Schedule

**\* indicates required field.**

\* Holiday Schedule Name:

All Holidays

Holiday	Date Start	Date End	Recurrence
Black Friday	11/25/2016	11/25/2016	None
Christmas Day	12/25/2016	12/25/2016	Indefinite
Christmas Eve	12/24/2016	12/24/2016	Indefinite
Independence Day	07/04/2016	07/04/2016	Indefinite
Labor Day	09/01/2016	09/01/2016	Limited To Date: 09/01/2017
Memorial Day	<div> September 2016 </div> <div> <div> Su Mo Tu We Th Fr Sa </div> <div> <div>1</div> <div>2</div> <div>3</div> <div>4</div> <div>5</div> <div>6</div> <div>7</div> <div>8</div> <div>9</div> <div>10</div> <div>11</div> <div>12</div> <div>13</div> <div>14</div> <div>15</div> <div>16</div> <div>17</div> <div>18</div> <div>19</div> <div>20</div> <div>21</div> <div>22</div> <div>23</div> <div>24</div> </div> </div>		

New Year's Day

Indefinite

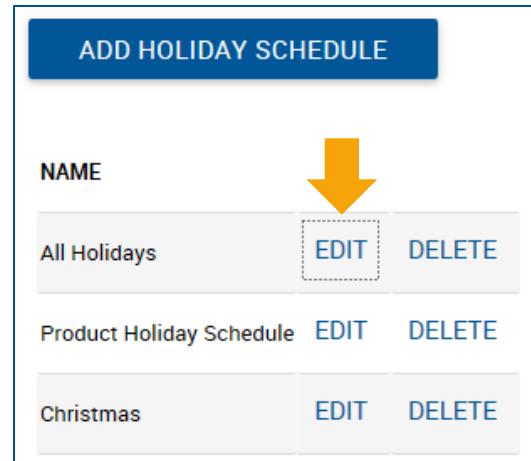
CANCEL

SAVE

### 5.3.2 Editing and Deleting a Holiday Schedule

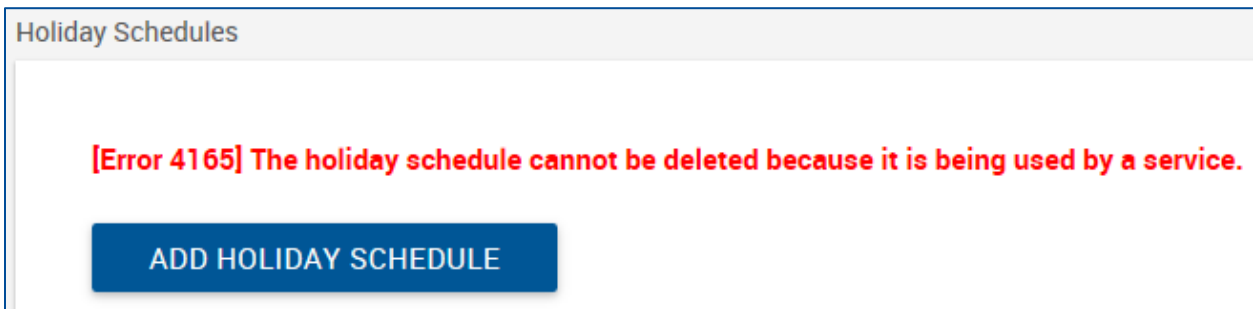
To edit a holiday schedule, locate the schedule from the list and click the **Edit** button to open the **Edit Holiday Schedule** menu. Edit the desired menu options. Click the **Save** button to keep your changes.

To delete the holiday schedule, locate the schedule from the list and click the **Delete** button. A confirmation window will populate. Click **OK** to proceed.



ADD HOLIDAY SCHEDULE		
NAME		
All Holidays	EDIT	DELETE
Product Holiday Schedule	EDIT	DELETE
Christmas	EDIT	DELETE

If the schedule is currently in use (assigned to a feature), you may not delete the schedule. You will receive an error stating: **[Error 4165] The holiday schedule cannot be deleted because it is being used by a service.** To delete this schedule, locate the feature using this schedule and disable it or assign a different schedule. You will then return to the Group Profile to delete it.



#### Holiday Schedules

**[Error 4165] The holiday schedule cannot be deleted because it is being used by a service.**

ADD HOLIDAY SCHEDULE

## 5.4 Dial Plan Policy

The Dial Plan Policy configures a group's dial plan policy for digit collection and outside access codes processing. This includes public and private dial plans simultaneously on a per-group basis. The Dial Plan policy allows integrated and consistent control of digit collection and external digit processing policies. One of the commonly used applications that require configuring this policy is to provide the capability to allow the "dial 9 to access an outside line" feature common in many PBX systems.

### To configure a dial plan policy:

1. Select the **Dial Plan Policy Settings For This Group**: System Settings, Service Provider Settings, or Group Settings. **Note:** The enterprise and service provider levels are equivalent for this feature.
2. Select **Requires Access Code for Public Calls**, if the access code is enforced to access the public dialing plan.
3. Select **Allow E.164 Public Calls**, if E.164 addresses are allowed as public calls regardless of the Non-Permissive option setting. However, it is only relevant when the **Requires Access Code for Public Calls** option is checked.
4. In the **\*Public Digit Map** text box, enter the digit map. **Note:** The "required" indicator beside the Public Digit Map field label appears only when the Dial Plan Policy Settings For This Group is set to "Group Settings". Use the following syntax for a digit map:
  - DigitMap: DigitString | "(" DigitString 0\*( "|" DigitString ) ")"
  - DigitString: 1\*((DTMFToken | "x" | DTMFRange) ["."])
  - DTMFRange: "[" 1\*((DIGIT "-" DIGIT) | DTMFToken) "]"
  - DTMFToken: DIGIT | "#" | "\*" | "T"
  - DIGIT: "0" | "1" | "2" | "3" | "4" | "5" | "6" | "7" | "8" | "9"

An example of a valid digit map valid is: **(1xxx|2.[#T])**. In this map, collection of digit strings starting with "1" stops after four digits (total) are collected. Collection of digit strings starting with "2" continues until a timeout ("T") is reached or until the "#" character is collected. Digits collected are then reported to the Application Server.

5. In the Private Digit Map text box, enter the private digit map. The private digit map is optional. If it is not entered, the public digit map is used. For information about digit map syntax, see the row above.
6. To add an access code, click **Add**. To edit an existing code, click **Edit**. See below for information about managing access codes.
7. To keep your changes, click **Save**.

### Managing Access Codes

1. In the **\*Access Code text box**, enter the access code number. An access code consists of 1 to 5 digits (0 through 9, \*, #) and does not contain wildcards. To edit an existing code, select code.
2. In the **Description** text box, enter a description for the access code.
3. Select **Include Code for Translations and Routing** if the access code should be included as part of the dialed digits for the purpose of network translations and routing.
4. Select **Include Code for Screening Services** if the access code should be included as part of the dialed digits for the purpose of call screening (for example, for the Outgoing Dialing Plan and Outgoing Calling Plan).
5. Select **Enable Secondary Dial Tone** if a secondary dial tone is applicable for calls initiated from an MGCP device or for call originations that involve the Media Server for digit collection. If this attribute is enabled, then the private digit map is initially used for digit collection. This attribute cannot be enabled unless a private digit map is configured. **Note:** This is only available when the Private Digit Map is configured.
6. To keep you changes, click **Save**.

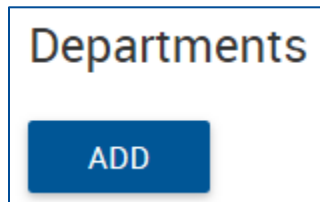


## 6 Departments

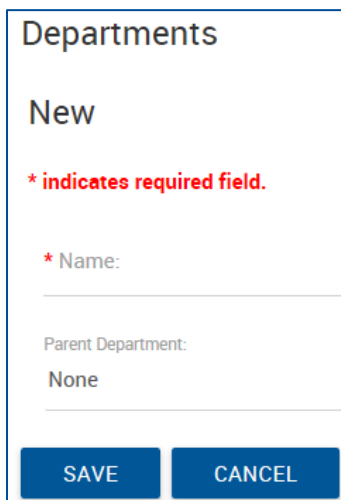
Departments allow you to create another level of Hierarchy for your group. By adding departments you may assign users to a department, assign department administrators, and then assign department features such as Hunt Groups. From this page, you may view the departments in your group using the drop-down menu, add a department, edit an existing department, and delete a department.

### 6.1 Adding a Department

To add a department, click the **Add** button.



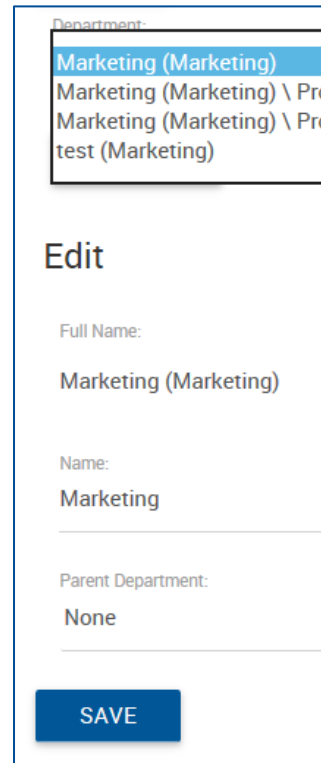
When the **New Department** page populates, enter the **Name** for the department. Select the **Parent Department** from the drop-down list.

A screenshot of a web form titled "Departments". Below the title is the word "New". A red asterisk followed by the text "\* indicates required field." is displayed. There are two input fields: the first is labeled "\* Name:" and the second is labeled "Parent Department:" with the value "None" selected. At the bottom of the form are two blue buttons: "SAVE" and "CANCEL".

Click the **Save** button to create the new department and return to the **Departments** page.

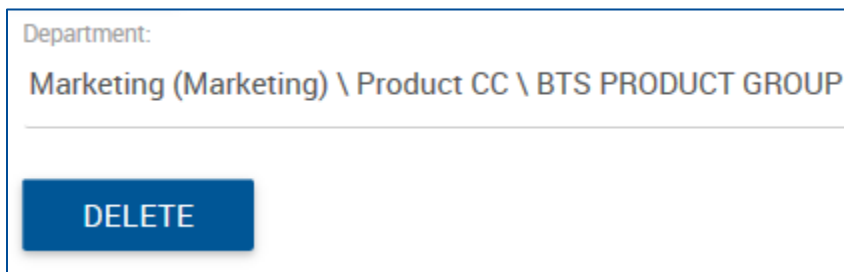
## 6.2 Edit a Department

To edit a department, choose the department from the drop-down list. Locate the **Edit** section directly below the drop-down list. Edit the Name and/or Parent Department. Click **Save** to keep your changes.

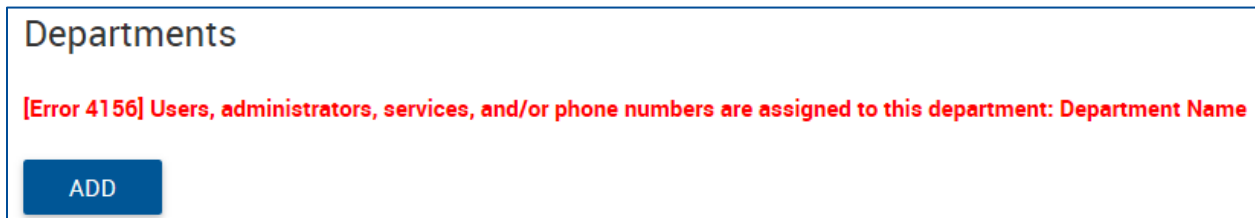


## 6.3 Delete a Department

To delete a department, select the department from the drop-down list then click the Delete button. The page will refresh and the department will no longer be available.



If a user or phone number is assigned to the department, you will receive an error: **[Error 4156] Users, administrators, services, and/or phone numbers are assigned to this department: Department Name.**



Remove this department from any user or service then try again.

## 7 Manage Users

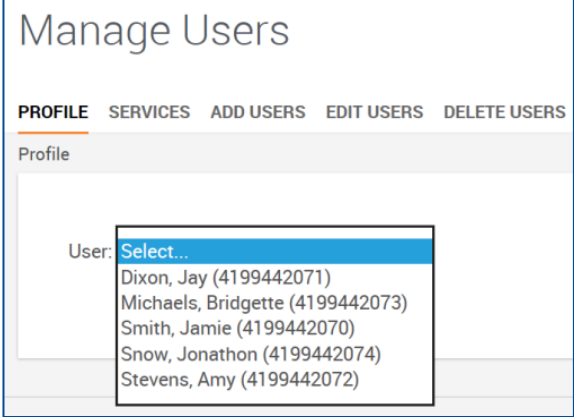
The Manage Users tab allows you to access information and settings for users within your group. The options available in this tab include:

- Editing a user's profile
- Activating/deactivating current services or features
- Request to Add, Edit and Delete Users

### 7.1 Manage Users – Profile

From the Profile menu, use the drop-down menu to select the User you wish to manage. Once you've selected a user, the page will load and you will be entered into the individual user's Profile menu. From this menu you may view or update:

- User's name
- Calling Line ID (CLID) Name
- Title
- Pager
- Mobile phone number
- E-mail
- Yahoo ID
- Location
- Address
- Password
- Privacy
- Call Policies
- Individual Time Schedules
- Device
- Lines
- Phone Number
- Assigned Services
- Assigned Service Packs



The screenshot shows the 'Manage Users' interface. At the top, there are five tabs: 'PROFILE', 'SERVICES', 'ADD USERS', 'EDIT USERS', and 'DELETE USERS'. The 'PROFILE' tab is selected and highlighted with an orange underline. Below the tabs, the word 'Profile' is displayed. A 'User:' label is followed by a dropdown menu. The dropdown menu is open, showing a list of users with their names and IDs in parentheses. The first option is 'Select...' in blue. The other options are: 'Dixon, Jay (4199442071)', 'Michaels, Bridgette (4199442073)', 'Smith, Jamie (4199442070)', 'Snow, Jonathon (4199442074)', and 'Stevens, Amy (4199442072)'.

**Note:** Updates made here may affect the user's information in directory listings.

From the Profile, you may also navigate to the user's Calling Features, My Calls, and Utilities tabs. To return to the Group Level Menus, use the drop-down boxes at the top of the page and change the **User** box to **All Users**. This will take you back to your Group Dashboard.

## 7.2 Manage Users – Services

From the Services menu, you may use the drop-down box to select a specific user. Once you have selected a user, the page will load and you will be entered into the individual user's Calling Features menu. From this menu you may view or update:

- Incoming Call Features
- Outgoing Call Features
- Call Control Features
- Calling Plans
- Messaging
- Client Applications
- Meet-Me Conferencing

**Note:** Available features will vary depending on packages and licenses assigned to the user.

From the Calling Features, you may also navigate to the user's Profile, My Calls, and Utilities tabs. To return to the Group Level menus, use the drop-down boxes at the top of the page and change the **User** box to **All Users**. This will take you back to you Group Dashboard.

## 7.3 Manage Users – Add Users

The Add Users menu will allow you to enter a Last Name, First Name, and E-mail Address and choose a package to add a user to your group. All fields are required. You may click on the **Add one more user** button to add multiple users at the same time.

Once you've completed the form, the page will load and you'll receive a message: **Thank you for your request. We'll contact you shortly with a confirmation.**

You will be contacted by a sales representative regarding this request during regular business hours.

### Manage Users

PROFILE SERVICES **ADD USERS** EDIT USERS DELETE USERS

Add Users

\* indicates required field.

\* Last Name:  
Smith

\* First Name:  
Jim

\* E-mail Address:  
jsmith@example.com

Package:  
Complete (Hosted Station)

SAVE

 or 

ADD ONE MORE USER

## 7.4 Manage Users – Edit Users

The Edit Users menu will allow you to choose a current user from your group using a drop-down window then click the **Edit** button. You will be presented with the following information for the user:

- User ID
- Last Name
- First Name
- Calling Line ID Last Name
- Calling Line ID First Name
- Department

**Note:** The name in the drop-box will no longer show the name of the user that you are editing. It will move on to the next available user in the list. There is a comment box to the right of the information. Add a description for what you would like to have changed for the user then click **Submit**. The page will refresh and you will receive the following message: **Thank you for your request. We'll contact you shortly with a confirmation.**

You will be contacted by a sales representative regarding this request during regular business hours.

PROFILE SERVICES ADD USERS **EDIT USERS** DELETE USERS

Edit Users

User: Smith Jamie (4199442070@combuckeye.com) EDIT

REMOVE

\* indicates required field.

UserID: 4199442072@combuckeye.com

Last Name: Stevens Request changes: \*

First Name: Amy

Calling Line ID Last Name: Stevens

Calling Line ID First Name: Amy

Department: None

SUBMIT

## 7.5 Manage Users – Delete Users

The Delete Users menu provides a list of users in your group with a checkbox preceding each user's name and phone number. Choose the user(s) you wish to delete by clicking on the checkbox next to the name. When a checkmark appears, click **Delete**.

The screenshot shows a web interface titled "Manage Users". At the top, there are five tabs: "PROFILE", "SERVICES", "ADD USERS", "EDIT USERS", and "DELETE USERS". The "DELETE USERS" tab is selected and underlined. Below the tabs, there is a sub-header "Delete Users". The main content area is titled "Delete Users" and contains a list of five users, each with a checkbox to its left:

- ☐ Smith Jamie (4199442070)
- ☐ Dixon Jay (4199442071)
- ☐ Stevens Amy (4199442072)
- ☐ Michaels Bridgette (4199442073)
- ☒ Snow Jonathon (4199442074)

At the bottom of the list is a blue button labeled "DELETE".

The page will refresh (the user will still be in the list). The following message will appear above the list of users: **Thank you for your request. We'll contact you shortly with a confirmation.**

You will be contacted by a sales representative regarding this request during regular business hours.

## 8 Group Services

The Group Services tab contains configurations and settings for features assigned to the Group you are managing. Available options are dependent on the phone plan you have purchased.

Available options may include:

- Site Services
  - Broadworks Anywhere
  - Call Center
  - Call Park
  - Call Pickup
  - Group CLID
  - Group Paging
  - Hunt Group
  - Instant Group Call
  - Music on Hold
  - Meet-Me Conferencing
  - Virtual On-Net Enterprise Extensions
- Calling Plans
  - Calling Plans
  - Account/Auth Codes
- FAC (Feature Access Codes)

**Note:** The Site Services that display here will vary depending on the features and licenses assigned to your group.

### 8.1 Site Services – Auto Attendants

If you have one or more auto attendants deployed to your group, you can access each from the Site Services menu. When you initially access the Auto Attendants section, you will be presented with a drop-down box that lists all Auto Attendants configured for your group. When you select the desired auto attendant from the list, the detailed settings of its profile will be visible.

#### 8.1.1 Auto Attendants- Profile

##### Profile

You may use this section to modify your Auto Attendant Name. Make any necessary changes to the Name then click **Save** to keep changes.

## Profile

Auto Attendant ID:	5676610740	Phone Number:	5676610740	Extension:	0740
Type:	Standard				
* Name:	Lab AA				

## Menu Configuration

Each auto attendant contains three menus: business hours, after hours, and holiday hours.

This section allows you to manage several global settings that apply to each menu and associate the correct schedule with the menu.

The three settings that you may manage for the entire auto attendant are:

- *Scope of Extension Dialing-*
  - While a caller is listening to the auto attendant message, they can dial a user's extension in order to reach them directly. This setting allows you to limit the accepted, dialed extension to the auto attendant's immediate department, group, or whole enterprise.
- *Scope of Name Dialing-*
  - The *name dialing* feature is available to be configured on any of your attendant menus (see the Dialing Menu section for details). This allows your callers to search for users on your system by typing in the first few characters of the person's last name. If this option is configured, this setting allows you to limit the available, searchable names to the auto attendant's immediate department, group, or whole enterprise.

Scope of Extension Dialing: ☒ Enterprise ☐ Group ☐ Department

Scope of Name Dialing: ☒ Enterprise ☐ Group ☐ Department

Name Dialing Entries: ☐ Last Name + First Name ☒ Last Name + First Name and First Name + Last Name

Business Hours

After Hours

Holiday Hours

Business Hours: 7-7 M-F Open Hours ▼ This value applies for both "Business Hours" and "After Hours" tabs.

- *Name Dialing Entries-*
  - The *name dialing* feature is available to be configured on any of your attendant menus (see the Dialing Menu section for details). This allows your callers to search for users on your system by typing in the first few characters of the person's last name. If this option is configured, this setting allows you to choose whether your callers can search for entries by typing in the first few characters of the person's last name ("Last Name + First Name") or *either* their first or last name ("Last Name + First Name and First Name + Last Name").



Below the global settings, you can choose one of the three available menus by clicking on its tab. The selected menu's tab will be blue.

## Greeting

The greeting area allows you to allocate an announcement to play when the selected menu is being used.

### Business Hours Greeting



☐ Default Greeting

☒ Personal Greeting open.wav

Load personal greeting:  No file chosen

When the Business Hours menu is selected, this section name will be *Business Hours Greeting*. Alternately, if you have the After Hours menu selected, it will be labeled *After Hours Greeting*.

The default greeting is a basic automated greeting that your callers will hear if selected. It says: "Welcome. Your call is being answered by an automated attendant. If you know the extension of the party you are trying to reach, dial it now." Additionally, if you have optional keys programmed for an operator or dial by name directory option configured, the automated message will alert callers to those options as well.

The Default Greeting may not be customized, however you can upload your own recording instead. To

load a customized greeting, click  button then upload the file from your device then click **Save** to save the changes.

Greeting files must be formatted as WAV, 8.000 or 16.000 kHz, 8 or 16 bit mono, ulaw, alaw, or PCM.

## Dialing Menu

The press options offered to callers for the business hours, after hours, and holiday menus may be configured by modifying this section. A description of each feature in this section is below.

If you have decided to allow your caller to dial an extension at any time during the message, place a checkmark by *enable first level extension dialing*.

The columns that configure the press options allowed on the menu are as follows:

- **Key Description**- the key press (0-9, \*, #) can be described in this text field. For example, if you configure option 7 to go to your answering service, you may want to name this field "Answering Service". This field does not materially change what the attendant option does, it simply makes it easier to manage.
- **Action**- this field allows you to configure the action which will happen when the caller presses the associated key. The available options are:
  - **Transfer without prompt** –transfers the caller to an extension or phone number.
  - **Transfer with prompt** – transfers the caller to an extension or phone number after playing the message "Your call is being transferred. Please hold."
  - **Transfer to operator** – transfers the caller to an extension or phone number after playing the message "please stay on the line while your call is transferred to the operator". Please note that callers who do not press any key after the greeting has been played three times will be forwarded to the operator. If no operator is configured, the call will be terminated.
  - **Transfer to submenu** – transfers the caller to a submenu for another set of options. See section 8.1.2 for more info on submenus.
  - **Name dialing** – allow your callers to search for a user by line name (a dial by name directory). You can allow the callers to search by first name only or by first or last name in the *name dialing entries* section above.
  - **Extension dialing** – allows callers to dial an extension only after pressing the key assigned this action.
  - **Repeat menu** – repeats the menu announcement.
  - **Exit** – hangs up on the caller after playing a system message "thank you for calling".
- **Details**- if you have chosen any of the transfer actions, you must allocate the transfer destination in this field. The *transfer without prompt*, *transfer with prompt*, and *transfer to operator* options will all require a valid extension or phone number (include a 1 if out of area) in the details field. The *transfer to submenu* option details will allow you to choose from any of your configured submenus.

### Business Hours Dialing Menu

☒ Enable first-level extension dialing

KEY	DESCRIPTION	ACTION	DETAILS
0		---	
1	Beca Cell	Transfer Without Prompt	16105928263
2	TS Main Number w Pt	Transfer With Prompt	8888086111
3	Transfer to Operator	Transfer To Operator	8009220204
4		Transfer To Submenu	TestSubmenu
5		Name Dialing	
6		Extension Dialing	
7		Repeat Menu	
8		Exit	
9		Transfer With Prompt	18882804331
*		Transfer With Prompt	16192310251
#		---	

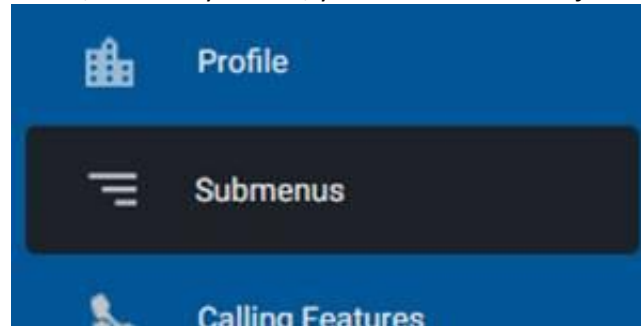
[EDIT](#)

Remember to that there are three menus available: Business Hours, After Hours, and Holiday. Each menu has its own set of menu options that may be configured.

### 8.1.2 Auto Attendants- Submenus

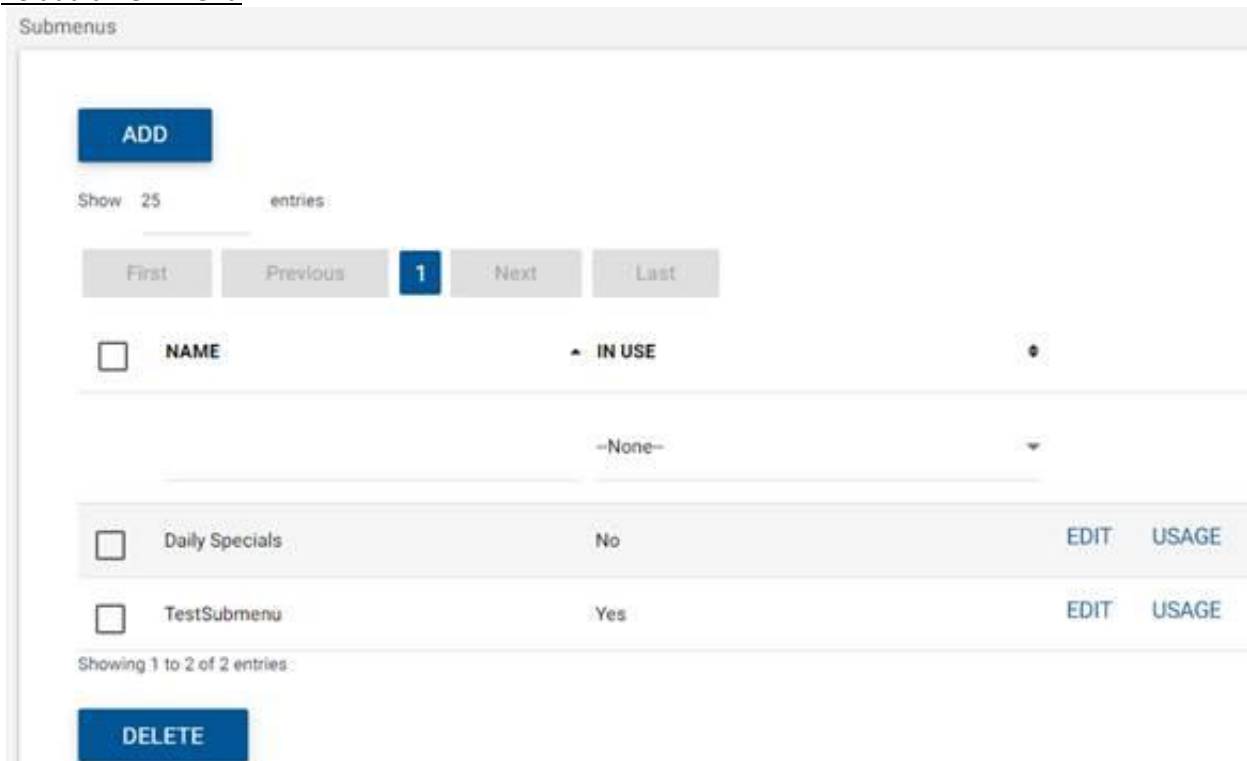
When callers interact with the business hours, after hours, or holiday menus, you can use the *Transfer to submenu* option to send the caller to another menu with its own set of options. Submenus are often used, for example, to announce hours and directions, weekly specials, department-specific information, and more.

While managing the auto attendant in the *Group Services – Site Services – Auto Attendant* section, the *Submenus* section is accessed by clicking on its title in the right pane.



This section allows you to add, delete, and manage submenus.

#### To add a new menu



<input type="checkbox"/>	NAME	IN USE	
<input type="checkbox"/>	Daily Specials	No	EDIT USAGE
<input type="checkbox"/>	TestSubmenu	Yes	EDIT USAGE

- Click **Add**
- **Complete** the menu details:
  - *Submenu ID*- input the submenu name
  - *Submenu Greeting* – choose from a default or personal greeting. If choosing personal greeting, be sure to upload the appropriate wav file. See section 8.1.1 for more about greetings.


- *Dialing Menu* – choose whether you want to enable anytime extension dialing and configure all desired press options. See section 8.1.1 for more about Dialing Menu option configuration.
- Click **Save**
- The new submenu will now appear on the main page area of the Submenus section.

#### To delete a menu


- Place a **checkmark** to the left of the menu's name in the main Submenus section.
- Click **Delete**
- Click **OK** when asked "are you sure..."

*Please note that you will not be able to delete a submenu that is in use. If you attempt to delete a submenu that is already being used by one of your attendant's menus, you will receive the following error:*

**[Error 9804] Cannot delete a submenu that is in use. (TestSubmenu)**

To confirm which menus are using this submenu, click the Usage  button to the right of the submenu's name. The screen that appears shows all menus that are currently referencing the submenu.

#### To manage an existing menu

- Click 
- Modify the desired settings (see the *Add* section above for details)
- Click **Save**

### 8.1.3 Auto Attendants- Calling Features

There are no configurable options in this section.

### 8.1.4 Auto Attendants- My Calls

The *My Calls* tab provides the option to Query Call Records and to obtain Call Detail Records (CDRs) for the Hunt Group. See an explanation of these logs in other sections of this guide such as 8.8.3.

### 8.1.5 Auto Attendants- Utilities

The Auto Attendant *Utilities* tab contains the following menus:

- Enterprise Directory
- Document Repository
- Registrations
- Feature Access Codes

An explanation of these sections is discussed in other service sections such as 8.3.5, 8.8.5, etc.

## 8.2 Site Services – Broadworks Anywhere

This feature extends your services so you can make and receive calls from any specified fixed phone, mobile phone, or soft client just as if it were your primary device.

This feature is configured on the user level. There are no settings/configurations required in this section.

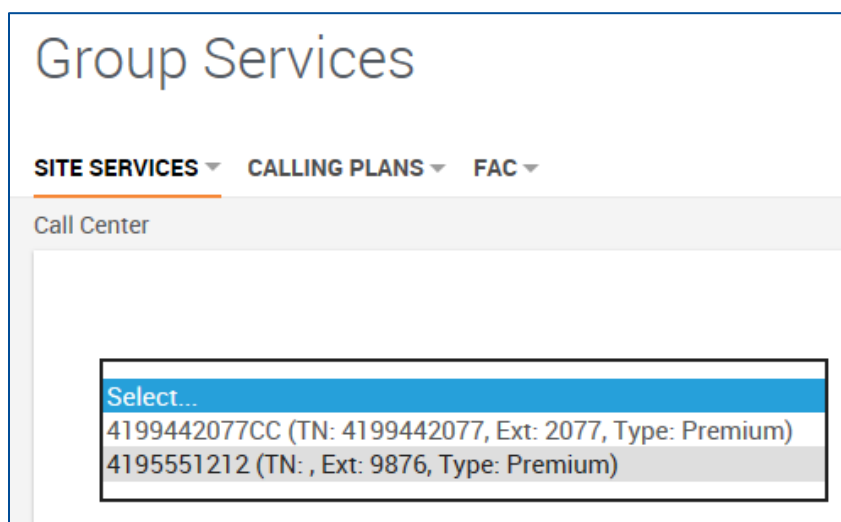
## 8.3 Site Services – Call Center

You may access Call Center from the Site Services menu. When you initially access Call Center, you will be presented with a drop-down box with all of the Call Centers configured for your group.

Scroll down past the drop-down box to manage your Group Disposition Codes and Group Agent Unavailable Codes from here along with the Group Call Center Routing Policies. Changes to these codes will affect all Call Centers assigned to this group.

You may also set Call Center Routing Policies at the bottom of the page. These policies allow you to configure how calls will be routed to agents assigned to more than one Call Center/Queue within the group. The options available include Longest Wait Time or Priority Order. Calls routed by longest wait time will have first in-first out routing. Priority Order allows you to set priority by Call Center/Queue where callers waiting in one queue will be routed prior to callers waiting in a different queue in the priority is set higher (lower numbers indicate higher priority).

To manage the settings and configuration for a specific Call Center, choose the Call Center you would like to view or edit from the drop-down box at the top of the page.



The page will refresh and you will be taken to the Call Center Profile page where you may also navigate to the Calling Features, My Calls, Call Center Routing Policies and Utilities tabs to manage your selected Call Center.

### 8.3.1 Call Center – Profile

The Call Center Profile page is broken down into the following sections:

- Profile Settings
- Bandwidth and QoS Settings
- Call Center Settings
- Agent Settings
- Agents
- Supervisors
- Announcements
- Distinctive Ringing
- Call Center DNIS
- Queue Notifications
- Call Disposition Codes

## Profile

[ANNOUNCEMENTS](#) [DISTINCTIVE RINGING](#) [CALL CENTER DNIS](#) [QUEUE NOTIFICATIONS](#) [CALL DISPOSITION CODES](#)

Profile

SAVE

\* indicates required field.

Profile Settings

Calling Line ID

Agent Settings

Supervisors

Call Policies

Agents

Bandwidth and QoS Settings

### 8.3.1.1 Profile Settings

The Profile Settings section of the Call Center Profile tab provides the following information:

<b>Call Center ID</b>	This is the identifier for the Call Center configured by an Administrator.
<b>Phone Number</b>	The phone number for the Call Center.
<b>Call Center Type</b>	This will display if you have a Standard or Premium Call Center. This will be important as some features are only available in Premium Call Centers.
<b>Name</b>	This is the name of the Call Center.
<b>Calling Line ID</b>	These fields may be set so that calls made through the Call Center's GUI are labeled with the Last Name and First Name set here for the called line's Caller ID information
<b>Department</b>	This drop-down box allows you to select a specific department that the Call Center may be assigned to.
<b>Language</b>	Sets the default language for the Call Center.
<b>Time Zone</b>	Sets the default time zone for the Call Center.
<b>Group Policy</b>	Options for Circular, Regular, Simultaneous, Uniform, and Weighted Call Distribution. For more information about the available policies see page 56.
<b>Statistics</b>	Click the <b>Edit</b> button to gain access to the Statistics pop-up. Here, you may manage reporting information such as the Statistic Source, Reporting Period, and Email address(es) where the report will be sent.

## Profile Settings

### CHANGE PASSWORD

Call Center ID:

4195551212

Phone Number:

Call Center Type:

Premium

Extension:

9876

\* Name:

Premium Call Center Test

### 8.3.1.2 Calling Line ID

The Calling Line ID section of the Call Center Profile tab allows you manage the name displayed on your outgoing Caller ID.

Calling Line ID

\* Last Name:

Product

\* First Name:

Testing

Department:

None

Language:

English

Time Zone:

(GMT-04:00) (US) Eastern Time

Group Policy:

☒ Circular

☐ Regular

☐ Simultaneous

☐ Uniform

☐ Weighted Call Distribution

EDIT

Statistics:

EDIT

The call routing Group Policies available for a Call Center are:

<b>Circular</b>	Incoming calls hunt through agents in the order they appear on the list, starting with the agent following the last agent to receive a call. When the search reaches the end of the list, it loops back to the top and continues until it has tried all users. After it has tried all agents a forward number must be setup in the No Answer field to route calls or calls will hear ringing followed by a message indicating “all circuits are busy”.
<b>Regular</b>	Incoming calls hunt through agents in the order they appear on the list, starting from the top each time.
<b>Simultaneous</b>	Incoming calls alert all agents at the same time. The first agent to answer handles the call.
<b>Uniform</b>	Incoming calls hunt through all agents in order, starting with the agent who has been idle the longest and ending with the agent who most recently answered a call.
<b>Weighted Call Distribution</b>	Incoming calls are assigned to idle agents based on percentages you assign on the Call Center’s Profile Weighted Call Distribution page. The percentages for all agents must add up to 100%. Selecting Weighted Call Distribution and then clicking on the <b>Edit</b> link here will open the Call Center Profile page.



### 8.3.1.3 Bandwidth and QoS Settings

The Bandwidth and QoS (Quality of Service) settings allow you to choose the preferred announcement/music codec for external and internal calls. The options for these settings are:

- None
- G711
- G726
- G729
- AMR

Bandwidth and QoS Settings

Preferred announcement / music codec for external calls:

☒ None  
☐ G711  
☐ G726  
☐ G729  
☐ AMR

### 8.3.1.4 Call Center Settings

The Call Center Settings section of the Call Center Profile allows you to determine the following options:

<b>Queue Length</b>	Set the maximum number of calls that can be in the Call Center's queue. Any calls after this will be considered overflow calls.
<b>Play ringing when offering call</b>	Set this option if you want your callers to hear ringing when the call is presented to a Call Center agent.
<b>Enable Call Center External Reporting</b>	Enable this option to allow for group administrators to access reports using the Hosted VoIP Phone System Admin Portal without accessing the Call Center GUI.
<b>Allow callers to dial ___ to escape out of queue</b>	Enable this option to allow for callers who are waiting in queue to dial a specified digit to have their call redirected (different phone number or voicemail). Additional features are required for this option to work.
<b>Reset caller statistics upon entry to queue</b>	Enabling this option will treat all calls into the Call Center as a "new" call. If this option is disabled, then a call that was active in a different Call Center will carry with it the active call handle statistics which will automatically promote it higher in the queue to decrease that caller's wait times. This may also cause callers who were already in the queue to be repositioned.

Call Center Settings

Queue Length: 5 calls

☒ Play ringing when offering call

☐ Enable Call Center External Reporting

☒ Allow callers to dial 0 to escape out of queue

☒ Reset caller statistics upon entry to queue

### 8.3.1.5 Agent Settings

From the Agent Settings section, you may enable or disable the following options:

<b>Allow agents to join Call Centers</b>	Enabling this option will allow an agent to join or remove themselves from receiving calls from a Call Center via their agent portal settings.
<b>Allow Call Waiting on agents</b>	Enabling this option will allow an agent who has the Call Waiting feature assigned and activated to receive calls distributed by the Call Center while they are already on a call.
<b>Enable calls to agents in wrap-up state</b>	Enabling this option will allow the Call Center to distribute calls to agents while their ACD state is set to <b>wrap-up</b> if no other agents are available.
<b>Enable maximum ACD wrap-up timer __:__ (minutes: seconds)</b>	Enabling this option allows you to configure the maximum amount of time an agent may have their ACD state set to wrap-up. Once the time expires the agent's ACD state is automatically set to Available.
<b>Automatically set agent state to _____ after call</b>	Enabling this option allows you to configure the default agent state immediately after a call. The agent can manually update their ACD state after this is set.
<b>Automatically answer calls after waiting __ seconds</b>	Enabling this option allows you to configure an auto answer for your agents. This is only recommended if your agents wear headsets. Without a headset this may put the caller on speakerphone.

## Agent Settings

- ☒ Allow agents to join Call Centers
- ☒ Allow Call Waiting on agents
- ☒ Enable calls to agents in wrap-up state
- ☒ Enable maximum ACD wrap-up timer 00 : 20 (minutes:seconds)
- ☒ Automatically set agent state to Wrap-Up ▼ after call
- ☒ Automatically answer calls after waiting 10 seconds

### 8.3.1.6 Agents

The Agents section will allow you to assign agents to the Call Center. It contains two lists and a search field. In the **Available Users** box on the left, you will see any users in your group that have an Agent License assigned to them. The **Assigned Users** box on the right, displays agents currently assigned to the selected Call Center. The **Search** field may be used to locate a specific user with an assigned agent license. Search for an agent by selecting the **Group** and **Department** in the drop-down menus; input the **Last Name** and/or **First Name** in the fields provided. Click **Search**.

**Agents**

Group ID: All Groups Department: Any

Last Name: First Name: **SEARCH**

Available Users		Assigned Users
Dixon, Jay (4199442071)		Michaela, Bridgette (4199442073) Smith, Jamie (4199442070) Stevens, Amy (4199442072) Snow, Jonathon (4199442074)
<b>ADD &gt;</b>		
<b>&lt; REMOVE</b>		
<b>ADD ALL &gt;&gt;</b>		
<b>&lt;&lt; REMOVE ALL</b>		
		<b>MOVE UP</b> <b>MOVE DOWN</b>

Add an agent to the Call Center by selecting the name from the Available Users box, and then click the **Add** button. The agent will be moved to the Assigned Users box. Remove an agent by selecting the name from the Assigned Users box and then click the **Remove** button. The agent will be moved to the Available Users box.

Add all Available Users by clicking the **Add All** button. All Available Users will move to the Assigned Users box. Remove all agents from the Call Center by clicking the **Remove All** button. All agents will move to the Available Users box.

The Assigned Users box will dictate how calls are routed to agents for some Group Policies. Modify the list by selecting the user you want to move in the Assigned User box and click the **Move Up** or **Move Down** button to put the user in the appropriate location within the list.

**Assigned Users**  
Michaels, Bridgette (4199442073)  
Smith, Jamie (4199442070)  
Stevens, Amy (4199442072)  
Snow, Jonathon (4199442074)  

MOVE UP

MOVE DOWN

### 8.3.1.7 Call Center Supervisors

The Supervisors section will allow you to assign supervisors to the Call Center. It contains two lists and a search field. In the **Available Supervisors** box on the left, you will see any users in your group that have a Supervisor License assigned to them. The **Assigned Supervisors** box on the right, displays supervisors currently assigned to the selected Call Center. The **Search** field may be used to locate a specific user with an assigned supervisor license. Search for a supervisor by selecting the **Group** and **Department** in the drop-down menus; input the **Last Name** and/or **First Name** in the fields provided. Click **Search**.

**Supervisors**  

Group ID:  
All Groups

Department:  
Any

Last Name:

First Name:

SEARCH

Available Supervisors

ADD >

< REMOVE

ADD ALL >>

<< REMOVE ALL

Assigned Supervisors  
Michaels, Bridgette (4199442073)

Add a supervisor to the Call Center by selecting the name from the Available Supervisors box, and then click the **Add** button. The supervisor will be moved to the Assigned Supervisors box. Remove a supervisor by selecting the name from the Assigned Supervisors box and then click the **Remove** button. The supervisor will be moved to the Available Supervisors box.

Add all Available Supervisors by clicking the **Add All** button. All Available Supervisors will move to the Assigned Supervisors box. Remove all supervisors from the Call Center by clicking the **Remove All** button. All supervisors will move to the Available Supervisors box.

Once a supervisor has been assigned to a Call Center, agents can be assigned from the user's personal profile page under the Call Control heading through the feature labeled Call Center – Supervisor, using the Edit option.

**Note:** A supervisor may be assigned as an agent to the Call Center as well, if you want calls distributed to the supervisor as an agent. The supervisor will still have the Supervisor GUI when they log in to the Call Center and will continue to receive escalations.

### 8.3.1.8 Call Center Call Policies

This section is used to modify the Call Policies for the Call Center.

The **Connected Line Identification Privacy on Redirected Calls** option applies to redirections before and after answer including Call Forwarding, Blind Transfer, Transfer with Consultation, Sequential Ring, and Simultaneous Ring. This option does not apply to services that are not considered redirections such as Automatic Hold/Retrieve, Call Pickup, Call Park, Directed Call Pickup, Directed Call Pickup with Barge-in, all types of Recalls, and so on.

Call Policies

View or modify Call Policies for the User

Connected Line Identification Privacy on Redirected Calls:

☒ No Privacy
 ☐ Privacy For External Calls
 ☐ Privacy For All Calls

Send Call Being Forwarded Response on Redirected Calls:

☐ Never
 ☐ Internal Calls
 ☒ All Calls

SAVE

For **Connected Line Identification Privacy on Redirected Calls**, select one of the following options:

<b>No Privacy</b>	When this option is selected, the redirecting party allows the Connected Line Identification Presentation (COLP) of the redirect destination to be sent to the remote party.
<b>Privacy for External Calls</b>	When this option is selected, the redirecting party allows the COLP of the redirect destination to be sent to the remote party, only when the remote party is in the same Group as the redirecting party. If the remote party is not in the same Group as the redirecting party (viewed as a Network subscriber), then the COLP sent to the remote party is the COLP of the redirecting party, not the COLP of the redirect destination.
<b>Privacy for All Calls</b>	When this option is selected the redirecting party never allows the COLP of the redirect destination to be sent to the remote party. The COLP sent to the remote party is always the COLP of the redirecting party, not the COLP of the redirect destination.

For the **Send Call Being Forwarded Response on Redirected Calls** setting, select one of the following options:

<b>Never</b>	When this option is selected and the Application Server redirects a call, the Application Server does not generate a 181 response.
<b>Internal Calls</b>	When this option is selected and the originating user is in the same group or enterprise as the redirecting user, the Application Server proxies or generates a 181 response.
<b>All Calls</b>	If the user redirects a call, a 181 response is proxied or generated.
<b>NOTE: 181 Responses received from network users are proxied, regardless of the setting for the user, if the Application Server is configured to do so at the system level.</b>	

Click the **Save** button to save changes.

### 8.3.1.9 Call Center Profile Announcements

You may use this menu to customize the Call Center Entrance, Estimated Wait Message, Comfort, Music on Hold, and Call Whisper messages. Navigate between the different available Announcement Messages using the drop-down box.

#### 8.3.1.9.1 Entrance Message

The **Entrance** message is the message that plays to callers upon entry into a queue. You may configure up to four files/URLs. All four announcements are chained and play back to the caller one after another.

Steps	Details
1. Indicate if the entrance message plays to queued callers.	Check or uncheck <b>Play entrance message</b> .
2. Specify if the entrance message is mandatory.	Check or uncheck <b>Entrance message is mandatory when played</b> . The entrance message plays to completion prior to routing the call. The call cannot be transferred or re-ordered while the mandatory entrance message is played.
3. Specify the audio and video files to be used in the message	For the <b>Audio</b> or <b>Video</b> files, select from the following: <ul style="list-style-type: none"> <li><b>Default</b></li> <li><b>URL</b> and then enter up to four URL addresses</li> <li><b>Custom</b> and then select up to four custom files</li> </ul> Click <b>Browse</b> next to each entry and then find and select the files. Click <b>Clear</b> next to an entry to clear the corresponding text box. This only clears the display and does not save changes.
4. Save your changes or exit without saving.	To save your changes, click <b>Save</b>

Entrance ▼

☒ Play entrance message

☐ Entrance message is mandatory when played

Audio:

☐ Default

☐ URL

☒ Custom

File 1:

File 2:

File 3:

File 4:

## 8.3.1.9.2 Estimated Wait Message

You may use these settings to customize the estimated wait message that plays to callers waiting in a Call Center queue. The message provides callers with either the approximate waiting time or their position in the queue. When the wait time or queue position of the caller exceeds the configured maximum, you may choose to play the following message to the caller:

**“We are experiencing a high volume of calls. Please hold.”**

Steps	Details
1. Enable or disable estimated wait message.	<p>Check or uncheck <b>Enable estimated wait message for queued calls</b>.</p> <ul style="list-style-type: none"> <li>To announce updated wait times to callers at specified intervals, check the <b>Play updated wait message every [X] seconds</b> option and enter the desired interval (in seconds) in the box.</li> <li>To announce their position in the queue to callers, check <b>Announce Queue position</b> and in the <b>Play</b> message for callers in queue position <b>[X] or lower text box</b>, enter the maximum queue position to play this announcement to. The number must be from one through 100. <ul style="list-style-type: none"> <li>To play the high volume announce to caller whose position in the queue is higher than the configured maximum, check <b>Play high volume message</b>.</li> </ul> </li> </ul>
2. Select and configure the message option you want to use for this Call Center.	<ul style="list-style-type: none"> <li>To announce their approximate waiting time to callers, check the <b>Announce wait time</b> and in the <b>Play message for callers with wait time of [X] minutes or lower</b> text box, enter the maximum waiting time (in minutes) during which the message can play. The number must be from one through 100. <ul style="list-style-type: none"> <li>To play the high volume message to callers whose estimated waiting time is longer than the configured maximum, check <b>Play high volume message</b>.</li> <li>In the <b>Default handling time</b> text box, enter the estimated handling time per-call (in minutes) to use when calculating the waiting time.</li> </ul> </li> </ul> <p><b>NOTE: The estimated waiting time = ([position in queue * average call handling time]/number of agents available or wrap-up)). The default handling time is used when the average call handling time is not available.</b></p>
3. Save your changes or exit without saving.	To save your changes, click the <b>Save</b> button.



## Estimated Wait ▾

☒ Enable estimated wait message for queued calls

☒ Play updated wait message every 60 seconds

☒ Announce queue position

\* Play message for callers in queue position: 100 or lower

☒ Play high volume message

☐ Announce wait time

\* Play message for callers with a wait time of: 100 Minute(s) or lower.

☒ Play high volume message

\* Default handling time: 5 minutes per call

SAVE

### 8.3.1.9.3 Comfort Message

This setting is used to customize the Call Center comfort message that plays to callers waiting in the queue before the call has been presented to a Call Center agent. You may configure up to four files/URLs for the message. All four announcements are chained and play back to the caller one after another.

Steps	Details
1. Indicate if the comfort message plays to users.	Check or uncheck <b>Play comfort message</b> .
2. Specify the time between messages.	In the <b>Time Between Messages: [X] seconds</b> , enter the time to elapse before replaying the comfort message.
3. Specify the audio and video files to play in the message	For the <b>Audio or Video</b> files, select from the following: <ul style="list-style-type: none"><li>• <b>Default</b></li><li>• <b>URL</b> and then enter up to four URL addresses.</li><li>• <b>Custom</b> and then select up to four custom files.<ul style="list-style-type: none"><li>○ Click <b>Browse</b> next to each entry and then find and select the files.</li><li>○ Click <b>Clear</b> next to an entry to clear the corresponding text box. This only clears the display and does not save changes.</li></ul></li></ul>
4. Save your changes or exit without saving.	To save your changes, click <b>Save</b> .

#### Comfort

☒ Play comfort message

Time Between Messages: 10 seconds

Audio:

☐ Default

1: \_\_\_\_\_

2: \_\_\_\_\_

☒ URL

3: \_\_\_\_\_

4: \_\_\_\_\_

☐ Custom

SAVE

#### 8.3.1.9.4 Music on Hold

Use these settings to customize the Call Center Music on Hold message that plays to callers who are put on hold by a Call Center agent. You may configure up to four files/URLs for the message. All four announcements are chained and play back to the caller one after another. You may also specify a different message to be played to internal callers.

Steps	Details
1. Indicate if the music or video plays to callers.	<p>Check or uncheck <b>Enable music on hold for queued calls</b>.</p> <p>For the <b>Audio</b> files, select from the following:</p> <ul style="list-style-type: none"> <li>• <b>Default</b></li> <li>• <b>URL</b> and then enter up to four URL addresses.</li> <li>• <b>Custom</b> and then select up to four custom files. <ul style="list-style-type: none"> <li>○ Click <b>Browse</b> next to each entry and then find and select the files.</li> <li>○ Click <b>Clear</b> next to an entry to clear the corresponding text box. This only clears the display and does not save changes.</li> </ul> </li> <li>• <b>External Source</b></li> </ul>
2. Specify the audio and video files to play in the message	
3. Specify the alternate source for internal messages.	<p>To play a different message to internal callers, check <b>Use Alternate Source for Internal Calls</b> and specify the Audio or Video files to play for internal calls. Select from the following:</p> <ul style="list-style-type: none"> <li>• <b>Default</b></li> <li>• <b>URL</b> and then enter up to four URL addresses.</li> <li>• <b>Custom</b> and then select up to four custom files. <ul style="list-style-type: none"> <li>○ Click <b>Browse</b> next to each entry and then find and select the files.</li> <li>○ Click <b>Clear</b> next to an entry to clear the corresponding text box. This only clears the display and does not save changes.</li> </ul> </li> <li>• <b>External Source</b></li> </ul>
4. Save your changes or exit without saving.	To save your changes, click <b>Save</b> .

Music On Hold ▼

☒ Enable music on hold for queued calls

Audio:

☒ Default

☐ URL

☐ Custom

☐ External Source

SAVE

#### 8.3.1.9.5 Call Whisper Message

Use this setting to customize the Call Center whisper message that plays to agents answering a call while the caller receives ringing. The message typically tells the agent from which Call Center the call is coming (which is especially important when using Dialed Number Identification Service [DNIS] numbers). The caller continues to hear the Call Center treatment (such as ringing or a message) while the whisper message plays to the agent.

You may configure up to four files/URLs for the message. All four announcements are chained and play back to the caller one after another.

Steps	Details
1. Indicate if the whisper message plays to agents	Check or uncheck <b>Play call whisper message</b> .  For the <b>Audio or Video</b> files, select from the following: <ul style="list-style-type: none"><li>• <b>Default</b></li><li>• <b>URL</b> and then enter up to four URL addresses</li><li>• <b>Custom</b> and then select up to four custom files<ul style="list-style-type: none"><li>○ Click <b>Browse</b> next to each entry and then find and select the files.</li><li>○ Click <b>Clear</b> next to an entry to clear the corresponding text box. This only clears the display and does not save changes.</li></ul></li></ul>
2. Specify the audio or video files to play in the message.	
3. Save your changes or exit without saving.	To save your changes, click the <b>Save</b> button.

#### Call Whisper ▾

☒ Play call whisper message

Audio:

☐ Default

☐ URL

File 1:

File 2:

#### 8.3.1.10 Call Center Profile Distinctive Ringing

The Distinctive Ringing menu allows you to configure distinctive ringing policies for calls routed to agents in the specific Call Center. When the call is presented to an agent, the audible ring pattern will be different based on which queue the call is coming from.

Steps	Details
1. Enable or disable distinctive ringing.	Check <b>Enable distinctive ringing for Call Center calls</b> to enable distinctive ringing when calls in this Call Center are offered to agents; or leave unchecked to disable distinctive ringing for this Call Center.
2. Specify the ring pattern for regular calls delivered to agents.	From the <b>Ring Pattern</b> drop-down list, select the ring pattern.
3. Specify the ring pattern for calls for-delivered to agents (Call Center – Premium)	From the <b>Ring Pattern for forced delivered Call Center calls</b> drop-down list, select the ring pattern.
4. Save your changes or exit without saving.	To save your changes, click <b>Save</b> .

☒ Enable distinctive ringing for call center calls

Ring Pattern: Short-Short-Long ▼

Ring Pattern for forced delivered call center calls: Long-Long ▼

SAVE

### 8.3.1.11 Call Center Dialed Number Identification Service (DNIS)

This menu is used to view and manage the Dialed Number Identification Service (DNIS) telephone numbers configured for the Call Center. The Call Center's primary phone number is treated as the Call Center's primary DNIS and listed on this page, but cannot be added or removed. The primary DNIS is indicated with (Primary) next to the name.

#### Call Center DNIS

##### DNIS Display settings:

- ☒ Display DNIS Number to agent when presenting call instead of Calling Number
- ☒ Display DNIS Name to agent when presenting call instead of Calling Name

##### DNIS Priority settings:

- ☒ Automatically promote calls with Priority 1 to Priority 0 after waiting 60 seconds
- ☒ Automatically promote calls with Priority 2 to Priority 1 after waiting 30 seconds
- ☒ Automatically promote calls with Priority 3 to Priority 2 after waiting 15 seconds

SAVE

Tasks	Steps
To configure queue-level DNIS settings (display and priority) for the Call Center:	<ol style="list-style-type: none"> <li>For <b>DNIS Display settings</b>: If you want the Call Center DNIS number and DNIS name to display to the agent's device instead of the Call Center Calling Number and Calling name, check: <ul style="list-style-type: none"> <li><b>Display DNIS Number to agent when presenting call instead of Calling Number</b></li> <li><b>Display DNIS Name to agent when presenting call instead of Calling Name</b></li> </ul> </li> <li>For <b>DNIS Priority settings</b>: To prevent lower priority calls from being stranded, allow lower priority calls waiting in the queue longer than the specified amount of time to be promoted to the next higher priority. <ul style="list-style-type: none"> <li>Check <b>Automatically promote calls with priority 1 to priority 0 after waiting [x] seconds</b> and specify the waiting time in seconds.</li> <li>Check <b>Automatically promote calls with priority 2 to priority 1 after waiting [x] seconds</b> and specify the waiting time in seconds.</li> <li>Check <b>Automatically promote calls with priority 3 to priority 2 after waiting [x] seconds</b> and specify the waiting time in seconds.</li> </ul> <p>For example, if you check <b>Automatically promote calls with priority 3 to priority 2 after waiting [x] seconds</b> and set X to "600", calls with priority "3" waiting in the queue longer than 10 minutes are promoted to priority "2".</p> </li> <li>Click <b>Save</b>.</li> </ol>

To assign a DNIS to the Call Center:	Select <b>Add New...</b> from the drop-down menu. See “Add Dialed Number Identification Service” below.
To view, modify, or delete a DNIS:	Select a DNIS from the drop-down menu, and settings for that entry will load.

#### 8.3.1.11.1 Adding a DNIS

This section allows you to assign a DNIS telephone to the Call Center using the drop-down box below the **Edit DNIS** header, choose **Add New...** then complete the following tasks and steps:

Edit DNIS:

Select...
Premium Call Center Test (Primary) (TN: , Priority: 3 - Low)
Add New...

Steps	Details
1. Enter the DNIS Name	<p>In the <b>DNIS Name</b> box, enter the name for this DNIS number; for example, “Technical Support” or “Reception”.</p> <p>This is the name that displays to agents when presenting calls to them if the option to display the DNIS instead of the calling number is enabled for the Call Center. This is a required field.</p>
2. Select the phone number.	<p>From the <b>Phone Number</b> drop-down list, select the number to assign to this DNIS.</p>
3. Assign the priority to assign to calls received on this DNIS.	<p>From the <b>Priority</b> drop-down list, select the priority for this DNIS number. “0” represents the highest priority.</p> <p>This priority is attached to incoming calls received on this DNIS number, and calls are distributed to agents based on their priority.</p>
4. Configure the DNIS Calling Line ID attributes.	<ul style="list-style-type: none"> <li>In the <b>Calling Line ID</b> box, enter the Calling Line ID (CLID) for the DNIS.</li> <li>To use a custom name for the DNIS Calling Line ID, check <b>Use custom Calling Line name settings</b> and enter the custom</li> </ul>

calling line first and last name in the **Calling Line ID Last name** and **Calling Line ID First Name** boxes.

- The **Use custom Calling Line name settings** option determines whether the DNIS level CLID values override the Call Center level CLID name values. If the option is enabled, the DNIS **Calling Line ID Last Name** and the **DNIS Calling Line ID First Name** are used for all outgoing calls. If the option is disabled, the Call Center's CLID last and first name are used instead.

**NOTE:** The DNIS Calling Line ID attributes are read-only for administrators who have the Calling Line ID Access set to read-only at the administrator or group level.

5. Specify whether to use custom announcements for this DNIS.	To use custom announcement settings, check <b>Use Custom DNIS announcement settings</b> .
6. Specify whether outgoing calls are allowed using this DNIS.	To allow outgoing calls using this DNIS number, check <b>Allow outgoing Call Center call</b> .
7. Save your changes.	Click <b>Save</b> .
8. Configure custom announcements settings.	Select the announcement to change from the drop-down menu.  See "DNIS Announcements" below.



Edit DNIS:  
Add New... DELETE

DNIS Configure

VIEW AGENT USAGE

DNIS Name:

Phone Number:

Extension:

Priority:

Calling Line ID:

☐ Use custom Calling Line name settings

Calling Line ID Last Name:

Calling Line ID First Name:

☐ Use custom DNIS announcement settings

☐ Allow outgoing call center call

SAVE

#### 8.3.1.11.2 DNIS Announcements

This section is used to customize the entrance message that plays to the caller waiting in a queue, for calls received on this Dialed Number Identification Service (DNIS) phone number. When custom announcements are enabled, the message plays to callers instead of the Call Center message.

Message Options include **Entrance**, **Comfort**, **Music on Hold**, and **Call Whisper**. The options can be selected from the drop-down menu to load and configure additional settings.

You can configure up to four files/URLs for the DNIS message. All four announcements are chained and play back to the caller one after another.

## 8.3.1.11.2.1 DNIS Entrance Message

The **DNIS Entrance Message** is a message that plays to callers upon entry into the queue received on this DNIS phone number. When custom announcements are enabled for the DNIS, this message plays to callers instead of the Call Center message.

You may configure up to four files/URLs for the entrance message. All four announcements are chained and play back to the caller one after another.

Steps	Details
1. Specify if the entrance message plays to the queued callers	Check or uncheck <b>Play entrance message</b> .
2. Specify if the entrance message is mandatory.	Check or uncheck <b>Entrance message is mandatory when played</b> . The entrance message plays to completion prior to routing the call. The call cannot be transferred or re-ordered while the mandatory entrance message is played.
3. Specify the audio and video files to be used in the message	For the <b>Audio</b> or <b>Video</b> files, select from the following: <ul style="list-style-type: none"> <li><b>Default</b></li> <li><b>URL</b> and then enter up to four URL addresses</li> <li><b>Custom</b> and then select up to four custom files</li> </ul> Click <b>Browse</b> next to each entry and then find and select the files. Click <b>Clear</b> next to an entry to clear the corresponding text box. This only clears the display and does not save changes.
4. Save your changes or exit without saving.	To save your changes, click <b>Save</b>

## Announcements

Entrance

☒ Play entrance message

☐ Entrance message is mandatory when played

Audio:

☐ Default

☐ URL

☒ Custom

File 1:

File 2:

File 3:

File 4:

## 8.3.1.11.2.2 DNIS Estimated Wait Message

These settings are used to customize the estimated wait message that plays to callers waiting in a Call Center queue for calls received on the DNIS number. When custom announcements are enabled for the DNIS, this message plays to callers instead of the Call Center message.

The message provides callers either with the approximate waiting time or with their position in the queue. When the waiting time or queue position of the caller exceeds the configured maximum, you may choose to play the following message to the caller:

**We are experiencing a high volume of calls. Please hold.**

Steps	Details
1. Enable or disable estimated wait message.	<p>Check or uncheck <b>Enable estimated wait message for queued calls</b>.</p> <ul style="list-style-type: none"> <li>To announce updated wait times to callers at specified intervals, check the <b>Play updated wait message every [X] seconds</b> option and enter the desired interval (in seconds) in the box.</li> <li>To announce their position in the queue to callers, check <b>Announce Queue position</b> and in the <b>Play</b> message for callers in queue position <b>[X] or lower text box</b>, enter the maximum queue position to play this announcement to. The number must be from one through 100. <ul style="list-style-type: none"> <li>To play the high volume announce to callers whose position in the queue is higher than the configured maximum, check <b>Play high volume message</b>.</li> </ul> </li> </ul>
2. Select and configure the message option you want to use for this Call Center.	<ul style="list-style-type: none"> <li>To announce their approximate waiting time to callers, check the <b>Announce wait time</b> and in the <b>Play message for callers with wait time of [X] minutes or lower</b> text box, enter the maximum waiting time (in minutes) during which the message can play. The number must be from one through 100. <ul style="list-style-type: none"> <li>To play the high volume message to callers whose estimated waiting time is longer than the configured maximum, check <b>Play high volume message</b>.</li> <li>In the <b>Default handling time</b> text box, enter the estimated handling time per call (in minutes) to use when calculating the waiting time.</li> </ul> </li> </ul> <p><b>NOTE: The estimated waiting time = ([position in queue * average call handling time]/number of agents available or wrap-up)). The default handling time is used when the average call handling time is not available.</b></p>
3. Save your changes or exit without saving.	To save your changes, click the <b>Save</b> button.

## Announcements

Estimated Wait ▾

☒ Enable estimated wait message for queued calls☒ Play updated wait message every 30 seconds☐ Announce queue position

\* Play message for callers in queue position: 100 or lower

☒ Play high volume message☒ Announce wait time

\* Play message for callers with a wait time of: 100 Minute(s) or lower.

☒ Play high volume message

\* Default handling time: 5 minutes per call

SAVE

## 8.3.1.11.2.3 DNIS Comfort Message

You may use this setting to customize the Call Center comfort message that plays to callers waiting in the queue for calls received on this DNIS phone number prior to the call being offered to a Call Center agent. When custom announcements are enabled for the DNIS, this message is played to callers instead of the Call Center message.

You may configure up to four files/URLs for the message. All four announcements are chained and play back to the caller one after another.

Steps	Details
1. Indicate if the comfort message plays to users.	Check or uncheck <b>Play comfort message</b> .
2. Specify the time between messages.	In the <b>Time Between Messages: [X] seconds</b> , enter the time to elapse before replaying the comfort message.
3. Specify the audio and video files to play in the message	For the <b>Audio or Video</b> files, select from the following: <ul style="list-style-type: none"><li>• <b>Default</b></li><li>• <b>URL</b> and then enter up to four URL addresses.</li><li>• <b>Custom</b> and then select up to four custom files.<ul style="list-style-type: none"><li>○ Click <b>Browse</b> next to each entry and then find and select the files.</li><li>○ Click <b>Clear</b> next to an entry to clear the corresponding text box. This only clears the display and does not save changes.</li></ul></li></ul>
4. Save your changes or exit without saving.	To save your changes, click <b>Save</b> .

## Announcements

Comfort

☒ Play comfort message

Time Between Messages: 10 seconds

Audio:

☐ Default

1:

2:

☒ URL

3:

4:

☐ Custom

SAVE

#### 8.3.1.11.2.4 DNIS Music on Hold Message

You may use these settings to customize the Call Center Music on Hold message that plays to callers placed on hold by a Call Center agent for calls received on this DNIS phone number. When custom announcements are enabled for the DNIS, this message plays to callers instead of the Call Center message.

You can configure up to four files/URLs for the message. All four announcements are chained and play back to the caller one after another. You can also specify a different message to be played to internal callers.

Steps	Details
1. Indicate if the music or video plays to callers.	<p>Check or uncheck <b>Enable music on hold for queued calls</b>.</p> <p>For the <b>Audio</b> files, select from the following:</p> <ul style="list-style-type: none"> <li>• <b>Default</b></li> <li>• <b>URL</b> and then enter up to four URL addresses.</li> <li>• <b>Custom</b> and then select up to four custom files. <ul style="list-style-type: none"> <li>○ Click <b>Browse</b> next to each entry and then find and select the files.</li> <li>○ Click <b>Clear</b> next to an entry to clear the corresponding text box. This only clears the display and does not save changes.</li> </ul> </li> <li>• <b>External Source</b></li> </ul>
2. Specify the audio and video files to play in the message	
3. Specify the alternate source for internal messages.	<p>To play a different message to internal callers, check <b>Use Alternate Source for Internal Calls</b> and specify the Audio or Video files to play for internal calls. Select from the following:</p> <ul style="list-style-type: none"> <li>• <b>Default</b></li> <li>• <b>URL</b> and then enter up to four URL addresses.</li> <li>• <b>Custom</b> and then select up to four custom files. <ul style="list-style-type: none"> <li>○ Click <b>Browse</b> next to each entry and then find and select the files.</li> <li>○ Click <b>Clear</b> next to an entry to clear the corresponding text box. This only clears the display and does not save changes.</li> </ul> </li> <li>• <b>External Source</b></li> </ul>

**4. Save your changes or exit without saving.**

To save your changes, click **Save**.

**8.3.1.11.2.5 DNIS Call Whisper Message**

This setting may be used to customize the call whisper message that plays to agents for calls received from this DNIS phone number. When custom announcements are enabled for the DNIS, this message plays to agents answering a call from the DNIS instead of the Call Center whisper message.

The message typically tells the agent from which call Center is coming (which is especially important when using Dialed Number Identification Service [DNIS] numbers). The caller continues to hear the Call Center treatment (such as ringing or a message) while the whisper message plays to the agent.

You may configure up to four files/URLs for the message. All four announcements are chained and play back to the caller one after another.

Steps	Details
<b>1. Indicate if the whisper message plays to agents</b>	Check or uncheck <b>Play call whisper message</b> .  For the <b>Audio or Video</b> files, select from the following: <ul style="list-style-type: none"><li>• <b>Default</b></li><li>• <b>URL</b> and then enter up to four URL addresses</li><li>• <b>Custom</b> and then select up to four custom files<ul style="list-style-type: none"><li>○ Click <b>Browse</b> next to each entry and then find and select the files.</li><li>○ Click <b>Clear</b> next to an entry to clear the corresponding text box. This only clears the display and does not save changes.</li></ul></li></ul>
<b>3. Save your changes or exit without saving.</b>	To save your changes, click the <b>Save</b> button.

**Announcements**

Call Whisper ▾

☒ Play call whisper message

Audio:

☐ Default

☐ URL

☒ Custom

File 1: 

Browse...

UPLOAD

File 2: 

Browse...

UPLOAD

File 3: 

Browse...

UPLOAD

File 4: 

Browse...

UPLOAD

SAVE

### 8.3.1.12 Call Center Profile Queue Notifications

The Queue Status Notification feature provides a mechanism for sending the Call Center status to the Dashboard in the Call Center GUI. This allows users to get a visual indicator of the Call Center status and modify their call handling behavior appropriately. This menu is used to configure queue status notification settings.

Steps	Details
1. Enable status notification.	Check <b>Enable notification of queue status to agent device</b> to activate the feature.
2. Configure notification thresholds.	<ul style="list-style-type: none"><li>• If you want a notification sent to agents when a queue exceeds a specified number of calls, check <b>Number of calls in queue</b> and enter the number of calls.</li><li>• If you want a notification sent to agents when the call waiting time for a queue exceeds a specified number of seconds, check <b>Longest waiting time</b> and enter the time in seconds.</li></ul>
3. Save your changes or exit without saving.	Click <b>Save</b> .

ANNOUNCEMENTS

DISTINCTIVE RINGING

CALL CENTER DNIS

**QUEUE NOTIFICATIONS**

Queue Notifications

SAVE

☒ Enable notification of queue status to agent devices

High volume notification thresholds

☒ Number of calls in queue 3

☐ Longest waiting time 1200 seconds

SAVE



### 8.3.1.13 Call Center Call Disposition Codes

Disposition Codes are additional attributes that agents may apply to calls. This allows agents to tag calls for marketing promotions, topics, and so on. Call disposition codes may be created using the Enterprise level or Call Center level log-in credentials.

This page is used to view the call disposition codes for the selected Call Center, including Enterprise level disposition codes, activate or deactivate Call Center level disposition codes, and specify default behavior for using disposition codes. This page will allow access to create disposition codes for the selected Call Center and modify or delete current Call Center level disposition codes.

Tasks	Steps
To set Call Center disposition calls defaults:	<ol style="list-style-type: none"> <li>1. To enable the use of disposition codes, check the <b>Enable call disposition codes</b> box.</li> <li>2. To use enterprise-level disposition codes in this Call Center, check <b>Use enterprise codes in addition to Call Center codes</b>.</li> <li>3. To force the use of disposition codes, check the <b>Force use of call disposition codes with Default code</b> and select the code to use from the drop-down list.</li> <li>4. To save your changes, click <b>Save</b>.</li> </ol>
To activate or deactivate a Call Center disposition code:	<ol style="list-style-type: none"> <li>1. Select a column to edit.</li> <li>2. Click <b>Edit</b>.</li> <li>3. Check or uncheck the <b>Active</b> box.</li> </ol> <p><b>NOTE: Enterprise-level disposition codes are activated by enterprise administrators.</b></p>
To look for specific disposition codes:	Enter the search criteria and click <b>Find</b> .
To create a disposition code for the Call Center:	Click <b>Add</b> . Enter a code and description and click <b>Add</b> .
To modify or delete a Call Center disposition code:	<ol style="list-style-type: none"> <li>1. Select an entry you want to edit and click <b>Edit</b>.</li> <li>2. Check the boxes beside the entries to delete, and click <b>Delete</b>.</li> </ol> <p><b>NOTE: Enterprise-level disposition codes are managed by enterprise administrators.</b></p>

### Call Disposition Codes Settings

☒ Enable call disposition codes

☒ Use enterprise codes in addition to call center codes

☒ Force use of call disposition codes with Default Code: 1-Billing (Enterprise) ▼

SAVE

### Call Disposition Codes

⋮ Search ✕ 🔍

<input type="checkbox"/>	Code ↑	Is Active	Description	Level
<input type="checkbox"/>	1	Y	Billing	Enterprise
<input type="checkbox"/>	2	Y	Technical	Enterprise
<input type="checkbox"/>	3	Y	Product Information	Enterprise
<input type="checkbox"/>	4	Y	CAN WE SERVE	Enterprise

⏪ < Page 1 of 1 > ⏩

ADD EDIT DELETE

### 8.3.2 Call Center – Calling Features

The Calling Features tab provides you with access to view and modify any call features that have been assigned to a group level for use with the Call Center, such as Call Forwarding which may be used to allow a caller to dial zero to escape the queue.

### 8.3.3 Call Center – My Calls

The My Calls tab provides the ability to **Query Call Details** and to obtain **Call Detail Records (CDRs)** for the Call Center.

From the Call Center level you will have options for **Queue Call Details** or **Last 20 Calls**.

### 8.3.3.1 Query Call Details – Sort By

This option allows you to select specific criteria to generate your report.

**Report**

**Sort by:** Start date/time In descending order

**Date range** to: 10/27/2016 (mm/dd/yyyy)

**Include:** ☒ Missed calls ☒ Outbound calls

**Search by full or partial telephone number:**

**CREATE REPORT**

The following options are available when sorting:

- Start date/time
- Answer time
- Release Date/time
- Call duration
- User phone
- From phone
- To phone
- Call type
- Call result
- Call category

Each of these may be sorted in descending or ascending order.

### 8.3.3.2 Query Call Details – Date Range

The date range allows for calendar dates to be selected for the period of time that you would like your results to include. Date Range is formatted in the following format: MM/DD/YYYY. You may click the calendar icon next to each text box and select a date by clicking on it within the pop up calendar.

**Report**

Sort by: Start date/time in descending order

Date range: from: 10/01/2016 to: 10/27/2016 (mm/dd/yyyy)

Include: ☒ Inbound calls

Search by full or partial telephone number: 734

Export

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

### 8.3.3.3 Query Call Details – Include

You have the option to indicate the types of calls you would like included in the query. The following options are available:

- Inbound Calls
- Missed Calls
- Outbound Calls

Check or uncheck the box preceding the option.

Include: ☒ Inbound calls ☐ Missed calls ☒ Outbound calls

### 8.3.3.4 Query Call Details – Search By

You have the option to only return results for a specific phone number or partial phone number. For example, if you only want to see calls made to 419-724-9898, type **4197249898** into the field labeled: **Search by full or partial telephone number**.

Search by full or partial telephone number: 4197249898

number:

**Note:** When searching for a number, do not add dashes, periods, or spaces. Enter the ten digit phone number and perform the search. The output will match the search results exactly.

If you want to search for calls made to the 734 area code, you may type 734 into the same box.

**Note:** Anytime the string 734 shows up in your call history, it will return the result. For example, a search for **734** will return 4195550734 as well as 7345551212.

Search by full or partial telephone number: 734

number:

### 8.3.3.5 Query Call Details – Create Report

The **Create Report** button will cause the query to run based on the criteria you have entered. The date will display at the bottom of the page in HTML format.

INDEX	ENTERPRISE	GROUP	DEPARTMENT	ACCOUNT CODE	USER ID	PHONE NUMBER	CALL TYPE	CALLING NUMBER	CALLED NUMBER	CALLER NAME	CALL DATE	CALL TIME	ANSWER DATE/TIME	RELEASE DATE/TIME	CALL DIRECTION	CALL DURATION	ANSWER INDICATOR	CALL CATEGORY	SPECIAL CALL TYPE
1	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal	+14197243718	+14199442077	Telesystem	10/27/2016	03:07 PM	10/27/2016 03:07 PM	10/27/2016 03:08 PM	Terminating	00:00:12	Yes		
2	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal	+14197243718	+14199442077	Telesystem	10/27/2016	03:07 PM	10/27/2016 03:07 PM	10/27/2016 03:07 PM	Terminating	00:00:12	Yes		
3	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal	+14197243718	+14199442077	Telesystem	10/27/2016	03:07 PM	10/27/2016 03:07 PM	10/27/2016 03:07 PM	Terminating	00:00:18	Yes		

The end result will contain the following information:

<b>Index</b>	<b>The index will identify which row of data you are displaying.</b>
<b>Enterprise</b>	Indicates what Enterprise within organization the User ID is assigned to.
<b>Group</b>	Indicates what Group of the Enterprise hierarchy the User ID is assigned to.
<b>Department</b>	Indicates what Department of the Group hierarchy the User ID is assigned to.
<b>Account Code</b>	Unsupported field
<b>User ID</b>	The User ID is your phone number set as a fully qualified domain name. Example <i>4195551212@combuckeye.com</i>
<b>Phone Number</b>	Your phone number with the +1 prefix. For example <i>+14195551212</i>
<b>Call Type</b>	Displays <b>Normal</b> .
<b>Calling Number</b>	This will display the phone number party that originated the call. The format will display the same as the <b>Phone Number</b> field.
<b>Called Number</b>	This will display the phone number of the party that received the call. The format will display the same as the <b>Phone Number</b> field.
<b>Caller Name</b>	This will display the caller ID name of the party you are speaking with if that caller is part of your Enterprise Directory.
<b>Call Date</b>	Displays the date of the call. The date is displayed in MM/DD/YYYY format.
<b>Call Time</b>	Displays the time of the call. The time is displayed in a 12-hour format with a leading 0 for single digit hours. AM and PM is not specified.
<b>Answer Date/Time</b>	Displays the date when the call was initially answered with the time for when the call was answered. This information will only display if the receiving party actually answers the phone. Unanswered calls will not display a result. The date and time follow the same formatting as the <b>Call Date</b> and <b>Call Time</b> .
<b>Release Date/Time</b>	This displays the time when the call was terminated. An unanswered call will display a release date and time. The date and time follow the same formatting as the <b>Call Date</b> and <b>Call Time</b> .
<b>Call Direction</b>	Indicates if the call is <b>Originating</b> (outgoing) or <b>Terminating</b> (incoming) from your perspective.
<b>Call Duration</b>	Displays the amount of time you participated in the call. This is shown in HH:MM:SS format.
<b>Answer Indicator</b>	Indicates if the call was answered with a <b>Yes</b> or <b>No</b> , or if the call went to voicemail ( <b>Yes – Post Redirection</b> ).

Call Category  
Special Call Type

Values such as: **Interlata, intralata, local, other, private**  
Indicates if a call feature was used in order to handle this call.

**Note:** The HTML output is only capable of displaying 500 entries. If your report criterion exceeds 500 entries it is advised that you use the **Export** options available below or narrow your date range.

### 8.3.3.6 Query Call Details – Exporting

You have the option to export data via three methods:

- Email
- PDF
- CSV

#### 8.3.3.6.1 Exporting – Email to

The **Email to** option provides a user with the ability to select report criteria then specify an email address to which the report details will be sent to.

Export

Email to:

After you enter the email address, click **Submit**. A notification will display to the right of the Submit button that the report is being generated and then a notice that will indicate the email sent.

If there is a problem with the email address in the **Email to** field, you will see a message that states **Please provide valid email**. The email address must follow the standard format such as: example@email.com.

#### 8.3.3.6.2 Exporting – Export to PDF

Using the **Export report to PDF** option will allow you to set the criteria and then generate the report with a PDF layout. This option is ideal if you're interested in a report that provides all of the included data in an easy to read PDF document. The data cannot be manipulated and the document can be shared and read by any device with a PDF reader.

To export to PDF, set the desired report criteria then click the **Submit** button next to **Export report to PDF**.

Export report to PDF

Once you click on the download link you will be presented with your browser's default download options which will determine where the file is saved to your local computer.

Export report to PDF  [Download PDF \(2 Kb\)](#)

**Note:** Additional software may be required to view the downloaded file. Please contact your system administrator for assistance.

### 8.3.3.6.3 Exporting – Export to CSV

Using the **Export to CSV** option will allow you to generate a report and receive the output in a CSV (Comma Separated Value) format. The CSV format allows users to access the data in a spreadsheet editor such as Microsoft Excel®. From there, unnecessary data can be removed or additional data can be added. Users may sort the data from within the application or import the data to a database and manage it from software such as Microsoft Access®.

To export a report to CSV, set the desired report criteria then click the **Submit** button next to **Export report to CSV**.

Export report to CSV **SUBMIT**

You will immediately see a notification that the system is preparing the report followed by a download link and the file size.

Export report to CSV **SUBMIT** [Download CSV \(1 Kb\)](#)

Once you click on the download link, you will be presented with your browser's default download options which will determine where the file is saved to your local computer.

**Note:** Additional software may be required to view and edit the downloaded file. Please contact your system administrator for assistance.

### 8.3.3.7 Call Center – Last 20 Calls

The **Last 20 Calls** option will automatically generate a report of the last 20 calls associated with the Call Center. The data is provided in HTML format. You will then have the option to email the data or export it to PDF or CSV.

## Export

Email to:  **SUBMIT**

Export report to PDF **SUBMIT**

Export report to CSV **SUBMIT**

INDEX	ENTERPRISE	GROUP	DEPARTMENT	ACCOUNT CODE	USER ID	PHONE NUMBER	CALL TYPE
1	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal
2	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal
3	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal

### 8.3.4 Call Center Routing Policies

This tab allows you to configure the various routing features of Call Centers.

**Note:** Not all features listed in this section are available for every Call Center Type. Only Premium Call Centers will have all listed features.

Features available include:

- Forced Forwarding
- Holiday Service
- Night Service
- Bounced Calls
- Comfort Message Bypass
- Call Center Overflow
- Stranded Calls
- Stranded Calls - Unavailable

#### 8.3.4.1 Call Center Forced Forwarding

This section is used to configure the Call Center to temporarily divert new incoming calls to a different route independent of the Night Service route. Forced Forwarding does not affect calls already in the queue.

**Note:** This is only available for Premium Call Centers.

Steps	Details
1. Enable or disable forced forwarding.	Select <b>On</b> to enable forced forwarding or <b>Off</b> to disable it.
2. Define where you would like calls forwarded.	In the <b>Calls Forward to phone number/SIP-URI</b> text box, enter the number.
3. Allow or forbid the use of feature access codes.	Check or uncheck <b>Allow feature access codes to configure forced forwarding</b> .
4. Define if an announcement is played before forwarding.	Check or uncheck <b>Play announcement before forwarding</b> .
5. Select the audio or video file.	For the <b>Audio</b> or <b>Video</b> file, select from the following: <ul style="list-style-type: none"><li>• <b>Default</b></li><li>• <b>URL</b> and then enter the address in the text box</li><li>• <b>Custom</b> and then select the custom file by clicking <b>Browse</b> to find a file for the <b>Load</b> text box</li></ul>
6. Save your changes or exit without saving.	To save your changes, click <b>Save</b> .



### Forced Forwarding

Forced Forwarding: ☐ On ☒ Off

Calls Forward to phone number: \_\_\_\_\_

☒ Allow feature access codes to configure forced forwarding

☐ Play announcement before forwarding

Audio:

☒ Default

☐ URL

☐ Custom

#### 8.3.4.2 Call Center Holiday Service

This section is used to configure the Call Center to route calls differently during the holidays.

1. Configure the Action setting. Select from:
  - **None**
  - **Perform busy treatment**
  - **Transfer to phone number/SIP-URI:** Enter the SIP-URI in the field provided
2. Select the **Holiday Schedule drop-down list**. Select the holiday schedule you want to use.
3. To play an announcement, check the box next to **Play announcement before holiday service action**.
4. Select the audio or video file from the following:
  - **Default**
  - **URL:** Enter the URL address in the field provided.
  - **Custom:** Select the custom file by clicking **Browse** to find the file and then click **Upload**.
5. To keep changes, click **Save**.

### Holiday Service

Action:

☐ None

☐ Perform busy treatment

☒ Transfer to phone number: 4199442073

Holiday Schedule: All Holidays ▾

☒ Play announcement before holiday service action

Audio:

☒ Default

☐ URL

☐ Custom

### 8.3.4.3 Call Center Night Service

This section is used to configure the Call Center to route calls differently during hours when the queue is not in service. This is determined by a schedule that defines the business hours of the queue. Night Service cannot be disabled; however, it can have a schedule that defines business hours to be twenty four hours a day, seven days a week. This means that no night service is provided.

NOTE: Night service requires Premium Call Center	
Steps	Details
	Select from the follow:
1. Configure the Action settings.	<ul style="list-style-type: none"> <li>None</li> <li>Perform busy treatment</li> <li>Transfer to phone number/SIP-URI and then enter the SIP-URI in the text box</li> </ul>
2. Set to force night service.	For <b>Force night service now regardless of business hours schedule</b> , select <b>On</b> or <b>Off</b> .
3. Select business hours.	From the <b>Business hours</b> drop-down list, select the business hours.
4. Define if feature access codes can override the night service.	Check or uncheck <b>All feature access codes to manually override night service</b> .
5. Define if an announcement is played.	Check or uncheck <b>Play announcement before night service action</b> . Select from the following modes for the announcement: <ul style="list-style-type: none"> <li>Normal announcement</li> <li>Manual mode announcement</li> </ul>
6. Select the Normal Mode Audio or Video file.	For the <b>Normal Mode Audio</b> or <b>Video</b> files, select from the following: <ul style="list-style-type: none"> <li>Default</li> <li>URL and then enter the address in the text box</li> <li>Custom and then select the custom file by clicking <b>Browse</b> to find a file for the <b>Load</b> text box</li> </ul>
7. Select a Manual Mode Audio or Video file	For the <b>Manual Mode Audio</b> or <b>Video</b> files, select from the following: <ul style="list-style-type: none"> <li>Default</li> <li>URL and enter the address in the text box</li> <li>Custom and then select the custom file by clicking <b>Browse</b> to find a file for the <b>Load</b> text box</li> </ul>
8. Save your changes or exit without saving.	To save your changes, click <b>Save</b> .

## Night Service

**Action:**

- ☐ None
- ☐ Perform busy treatment
- ☒ Transfer to phone number: 4195551212

Force night service now regardless of business hours schedule: ☐ On ☒ Off

Business Hours: Business Hours ▼

- ☒ Allow feature access codes to manually override night service
- ☒ Play announcement before night service action

Announcement to play in manual override mode: ☒ Normal announcement ☐ Manual mode announcement

**Normal Mode Audio:**

- ☒ Default
- ☐ URL
- ☐ Custom

**Manual Mode Audio:**

- ☒ Default
- ☐ URL
- ☐ Custom

#### 8.3.4.4 Call Center Bounced Calls

Bounced calls occur when a call is presented to a Call Center agent but the agent does not answer the call. Configure the Call Center routing policy for calls unanswered by agents.

Steps	Details
1. Select whether or not to bounce calls.	Check or uncheck <b>Bounce calls after [x] rings</b> and then enter the number of rings in the text box.
2. Select whether or not to transfer the call.	Check or uncheck <b>Transfer to phone number/SIP-URI</b> and then enter the number in the text box.
3. Select whether or not to bounce calls when agent is unavailable.	Check or uncheck <b>Bounce calls if agent becomes unavailable while routing the call.</b>
4. Save your changes or exit without saving.	To save your changes, click <b>Save</b> .

### Bounced Calls

☒ Bounce Calls after 3 rings

☐ Transfer to phone number:

☒ Bounce calls if agent becomes unavailable while routing the call

☒ Alert agent if call is on hold for longer than 30 seconds

☐ Bounce calls after being on hold by agent for longer than 60 seconds

#### 8.3.4.5 Comfort Message Bypass

This section is used to configure the Call Center to play ringing and/or a different message instead of music and comfort messages whenever the call is expected to be answered quickly.

1. Select **On** to enable Comfort Message Bypass or **Off** to disable.
2. Define the estimated wait time in seconds and enter in the field provided.
3. To play an announcement after ringing, check the box provided. Enter the time in seconds.
4. Select the **Audio** or **Video** file from the following:
  - **Default**
  - **URL:** Enter the address in the field provided.
  - **Custom:** Select the custom file by clicking **Browse** to find the file. Click **Upload**.
5. To keep changes, click **Save**.

### Comfort Message Bypass

Comfort Message Bypass: ☒ On ☐ Off

Bypass comfort message when estimated wait time is less than: 30 seconds

☐ Play announcement after ringing for 10 seconds

Audio:

☒ Default

☐ URL

☐ Custom

#### 8.3.4.6 Call Center Overflow

This section is used to configure the Call Center routing policy when a large number of calls have been received or when calls have been waiting longer than the configured threshold.

Steps	Details
1. Configure the Action settings.	Select from the following: <ul style="list-style-type: none"> <li>• <b>Perform busy treatment</b></li> <li>• <b>Transfer to phone number/SIP-URI</b> and then enter the SIP-URI in the text box</li> <li>• <b>Play ringing until caller hangs up</b></li> </ul>
2. Select the overflow time.	Check or uncheck <b>Enable overflow after calls, wait [x] seconds</b> , and enter the number of seconds in the text box.
3. Select to play an announcement before overflow processing.	Check or uncheck <b>Play announcement before overflow processing</b> .
4. Select an audio or video file.	For the <b>Audio</b> or <b>Video</b> files, select from the following: <ul style="list-style-type: none"> <li>• <b>Default</b></li> <li>• <b>URL</b> and then enter the address in the text box</li> <li>• <b>Custom</b> and then select the custom file by clicking <b>Browse</b> to find a file for the <b>Load</b> text box</li> </ul>
5. Save your changes or exit without saving.	To save your changes, click <b>Save</b> .

### Overflow

**Action:**

☐ Perform busy treatment  
☐ Transfer to phone number: \_\_\_\_\_  
☒ Play ringing until caller hangs up

☐ Enable overflow after calls wait 30 seconds  
☐ Play announcement before overflow processing

**Audio:**

☒ Default  
☐ URL  
☐ Custom

### 8.3.4.7 Call Center Stranded Calls

Configure the Call Center Routing Policy for calls stranded in queue when all agents have signed out.

Steps	Details
1. Configure the Action settings.	<p>Select from the following:</p> <ul style="list-style-type: none"> <li>• <b>Leave in queue</b></li> <li>• <b>Perform busy treatment</b></li> <li>• <b>Transfer to phone number/SIP-URI</b> and then enter the SIP-URI in the text box</li> <li>• <b>Night Service (Requires Premium Call Center)</b></li> <li>• <b>Play ringing until caller hangs up (Requires Premium Call Center)</b></li> <li>• <b>Play announcement until caller hangs up (Requires Premium Call Center)</b></li> </ul>
2. Select an audio or video file (Requires Premium Call Center)	<p>For the <b>Audio</b> or <b>Video</b> files, select from the following:</p> <ul style="list-style-type: none"> <li>• <b>Default</b></li> <li>• <b>URL</b> and then enter the address in the text box</li> <li>• <b>Custom</b> and then select the custom file by clicking <b>Browse</b> to find a file for the <b>Load</b> text box</li> </ul>
3. Save your changes or exit without saving.	To save your changes, click <b>Save</b> .

### Stranded Calls

**Action:**

☒ Leave in queue

☐ Perform busy treatment

☐ Transfer to phone number: \_\_\_\_\_

☐ Night Service

☐ Play ringing until caller hangs up

☐ Play announcement until caller hangs up

**Audio:**

☒ Default

☐ URL

☐ Custom

#### 8.3.4.8 Call Center Stranded Calls – Unavailable

This section is used to configure the action to be taken when there are stranded calls in the call center, all agents are unavailable, and a predefined number of agents have a specific unavailable code.

This example is helpful if there are stranded calls and the only 2 agents are on a break.

### Stranded Calls - Unavailable

This policy is performed when all agents are unavailable, and:

☒ at least  agents have unavailable code:

**Action:**

☒ Leave in queue

☐ Perform busy treatment

☐ Transfer to phone number:

☐ Night Service

☐ Play ringing until caller hangs up

☐ Play announcement until caller hangs up

from the following:

- Leave in queue
- Perform busy treatment
- Transfer to phone number/SIP-URI and then enter the SIP-URI in the text box
- Night Service *(Requires Premium Call Center)*
- Play ringing until caller hangs up *(Requires Premium Call Center)*
- Play announcement until caller hangs up *(Requires Premium Call Center)*

Audio or Video files, select from the following:

Default

URL and then enter the address in the text box

Custom and then select the custom file by clicking **Browse** to find a file for the **Load** text box

Save your changes, click **Save**.

1. **Check the box** if you want a specific action to take place when a specific number of agents are using a specific unavailable code.
2. Enter the minimum **number of agents** using the unavailable code in the field provided.
3. Use the **Unavailable Code drop-down menu** and select the appropriate code.
4. Select the appropriate **Action** and **Audio** settings.



### 8.3.5 Call Center Utilities

The Call Center Utilities tab contains the following menus:

- Enterprise Directory
- Document Repository
- Registrations
- Feature Access Codes

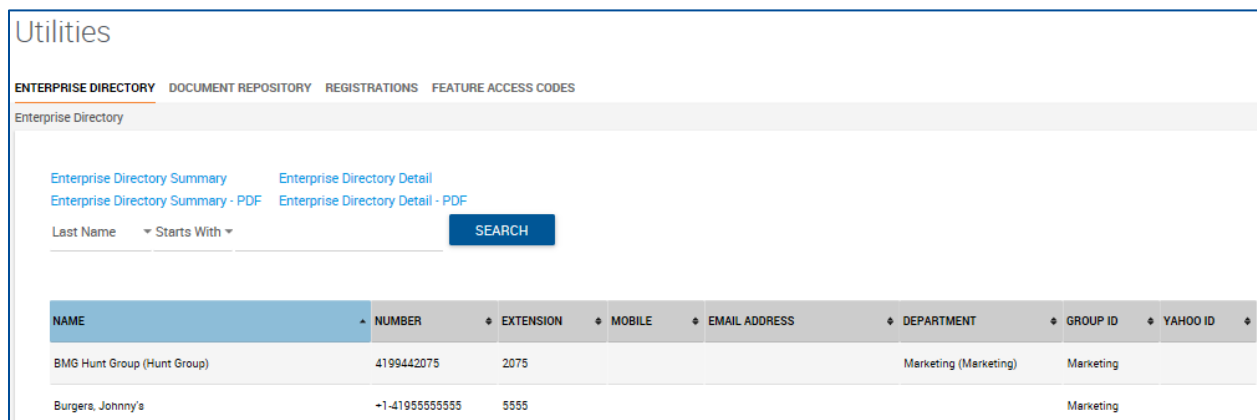
#### 8.3.5.1 Call Center Enterprise Directory

The Enterprise directory menu provides you with a data table of the entire enterprise directory. The directory displays the following information regarding each user or group where applicable:

- Name
- Number
- Extension
- Mobile (phone number)
- Email Address
- Department
- Group ID
- Yahoo ID

You may search for a specific entry in the directory using the available search fields. Entries may be searched for by Last Name, First Name, or Phone Number. Search results may be expanded or narrowed using the drop-down menu with the options: **Starts With**, **Contains**, and **Equal To**.

From this menu, you also have the links available to view the Enterprise Directory Summary as a separate web page or download it as a PDF.



Utilities

ENTERPRISE DIRECTORY DOCUMENT REPOSITORY REGISTRATIONS FEATURE ACCESS CODES

Enterprise Directory

[Enterprise Directory Summary](#) [Enterprise Directory Detail](#)  
[Enterprise Directory Summary - PDF](#) [Enterprise Directory Detail - PDF](#)

Last Name Starts With

NAME	NUMBER	EXTENSION	MOBILE	EMAIL ADDRESS	DEPARTMENT	GROUP ID	YAHOO ID
BMG Hunt Group (Hunt Group)	4199442075	2075			Marketing (Marketing)	Marketing	
Burgers, Johnny's	+1-4195555555	5555				Marketing	

#### 8.3.5.2 Call Center Document Repository

Document Repository acts as a centralized repository to keep track of help guides, templates, etc.

### 8.3.5.3 Call Center Registrations

This page is used to view your static and dynamic registrations.

The following table explains the key fields that may appear on this page:

Item	Description
Endpoint Type	The SIP device or virtual user endpoint at which the service is deployed. Valid types include Primary, Video Add On, and Shared Call Appearance.
Line/Port	The line, port number or SIP address of the endpoint location. This information is dependent on the identity/device profile's type.
Identity/Device Profile name	The Identity/Device Profile in the system assigned to the user.
URI	The Universal Resource Indicator (URI) identifying the device. Both static and dynamic registrations are possible, depending on the device profile.
Expiration	The registration expiry date, for dynamic registrations.

### 8.3.5.4 Call Center Feature Access Codes

The Feature Access Codes menu displays touch tone codes for features that may be used in conjunction with your Call Center. This list may vary for each Call Center depending on which features are assigned to the Call Center.

## Utilities

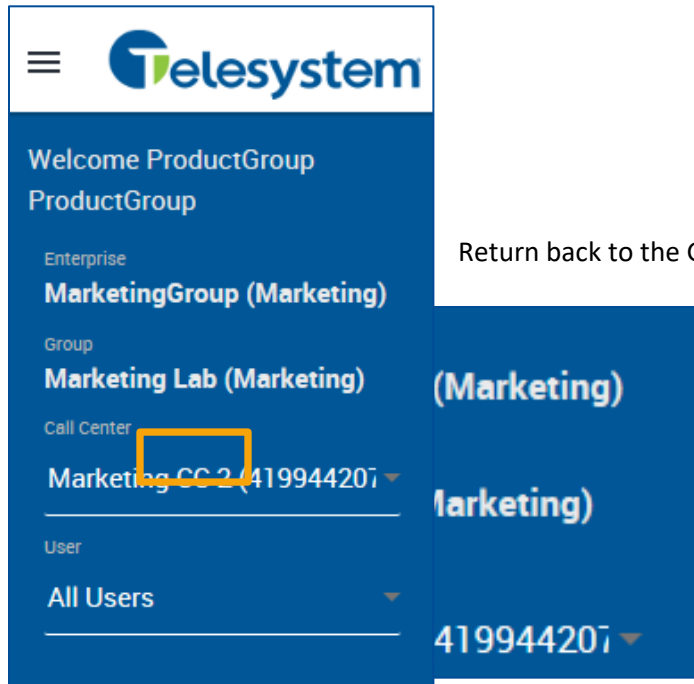
ENTERPRISE DIRECTORY DOCUMENT REPOSITORY REGISTRATIONS **FEATURE ACCESS CODES**

## Feature Access Codes

FEATURE ACCESS CODE NAME	MAIN (REQUIRED)	ALTERNATE (OPTIONAL)
Call Park	*68	
Call Park Retrieve	*88	
Call Pickup	*98	
EOCP Sustained Authorization Code Lock	*37	
EOCP Sustained Authorization Code Unlock	*47	
FMFM Call Push	*26	
Group Call Park	#58	
Music On Hold Per-Call Deactivation	*60	
Per-Call Account Code	*71	

### 8.3.6 Call Center Navigation

Navigate between Call Centers and users with drop-down boxes available along the left side of the screen:



Return back to the Group Dashboard by clicking on the **Group** link:

#### 8.4 Site Services – Call Park

The Call Park service allows users to park a call against a member of their group so that any member of the group can retrieve it using the Call Park Retrieve function.

The Group Call Park feature provides a hunting mechanism so that when parking a call, the service hunts for an available user in the parking user's Call Park Group as a place to park the call. A user can be assigned to only one Call Park Group.

### 8.4.1 Configuring Call Park

Tasks	Steps
To configure Call Park and Group Call Park Settings:	<p><b>For Call Park:</b></p> <ol style="list-style-type: none"> <li>If applicable, for the <b>Recall To</b> setting, select the recall destination as follows: <ul style="list-style-type: none"> <li>Select <b>Alert parking user only</b> to alert only the user who parked the call.</li> <li>Select <b>Alert parking user first, then alternate user</b> to first alert the user who parked the call, and then the alternate user if the parking user does not answer the recall.</li> <li>Select <b>Alert alternate user</b> to alert only the alternate user.</li> </ul> <p>This setting is initially set to <b>Alert parking user only</b>. It cannot be changed until an alternate recall user is selected.</p> <p><b>NOTE:</b> For Group Call Park, this setting is configured separately for each Call Park group.</p> </li> </ol> <p><b>For Group Call Park:</b></p> <ol style="list-style-type: none"> <li>Specify the Group Call Park display timer, which controls how long the server waits before releasing the parking call, that is the call used to park an incoming call, made using Group Call Park. In the <b>Display Timer</b> drop-down box, select the time in seconds.</li> <li>To announce to the parking user the extension/directory number of the destination against which the call has been parked, check <b>Enabled parked destination announcement</b>.</li> </ol> <p><b>For All Parked Calls:</b></p> <ol style="list-style-type: none"> <li>Configure the ringing pattern for recalled calls so that the recalled party knows whether a call is a recall or not. From the <b>Ring Pattern for Recalled Calls</b> drop-down list, select the ringing pattern.</li> <li>Configure the time after which the parked call is recalled. In the <b>Recall Timer</b> box, enter the recall time in seconds.</li> <li>Configure the time after which to send the recalled call to the alternate user. In the <b>Alert Alternate Recall User Wait Time</b> box, enter the time in seconds.</li> <li>Save your changes. Click <b>Apply</b> or <b>OK</b>. Apply saves your changes. OK saves your changes and displays the previous page.</li> </ol> <p>To exit without saving, select another page or click <b>Cancel</b> to display the previous page.</p>
	<p><b>To select an alternate recall user for calls parked using Call Park:</b></p> <p>Select an Alternate Recall User from the drop-down box.</p> <p><b>NOTE:</b> For calls parked using Group Call Park, this setting is configured separately for each Call Park group.</p>
	<p><b>To add a Call Park group:</b></p> <p>Click <b>Add</b>.</p>

To Delete a Call Park group: Select the call park group and click **Delete**.

#### 8.4.2 Select Alternate Recall User

**Note:** The alternate recall user must be one of the hunt groups in your group.

Steps	Details
Select a hunt group to assign as the alternate recall user.	From the Alternate Recall User drop-down box, select the hunt group you want to be the alternate recall user.

#### 8.4.3 Call Park Groups Add

**Note:** The **Recall To** setting is initially set to **alert parking user only**. It cannot be changed until an alternate recall user is selected.

Steps	Details
1. Name the Call Park Group (required)	<p>In the <b>Group Name</b> box, enter the name of the Call Park group. This is a required field.</p> <ul style="list-style-type: none"> <li>Search for available users. To display all the available users, click <b>Search</b>. Or to search for specific users, first enter your search criteria and then click <b>Search</b>. The users that satisfy your criteria appear in the <b>Available Users</b> column.</li> <li>To add specific users to the Call Park group, in the <b>Available Users</b> column, select the users you want to add and click <b>Add</b>. To add all the available users, click <b>Add All</b>. The users are moved to the <b>Assigned Users</b> column.</li> <li>To remove specific users, in the <b>Assigned Users</b> column, select the users and click <b>Remove</b>. Or to remove all users, click <b>Removed All</b>.</li> </ul> <p><b>TIP:</b> You can select some or all of the items in a column. To select several items in sequential order, click the first item, hold down the <b>SHIFT</b> key, and click the last item. To select several items, but not in a particular order, click the items while holding down the <b>CTRL</b> key.</p>
2. Select the members of the Call Park group.	
3. Order the members of the Call Park group.	Use the <b>Move Up</b> and <b>Move Down</b> buttons to move users up and down the <b>Assigned Users</b> column. The Group Call Park service hunts for an available user in the order you establish here.
4. Configure an alternate recall user, if applicable.	To configure an alternate recall user, select from the Alternate Recall User drop-down box.

#### 8.4.4 Call Park Groups Modify

Tasks	Steps
To delete the Call Park group:	<p>Select the group from the drop-down box, then click <b>Delete</b>.</p> <p><b>WARNING: This action cannot be undone. When you click Delete, the Call Park group is permanently deleted.</b></p>

## 8.5 Site Services – Call Pickup

Call Pickup allows users to pick up calls within an assigned Call Pickup group. When users dial the Call Pickup code (\*98), the ringing phone in the group is answered. If more than one phone is ringing, Call Pickup allows users to answer the phone that has been ringing the longest.

Use the following steps to configure Call Pickup:

Steps	Details
1. Add a Call Pickup Group	If no groups are created, enter a name and click <b>Add</b> . To add additional groups, click <b>Add</b> , enter a name and click <b>Save</b> .
2. Search for users to assign to the call pickup group.	Use the search bar provided to find the desired users. You can search for users by <b>Last Name</b> , <b>First Name</b> , or <b>Department</b> . Search results are listed in the <b>Available Users</b> column. Assigning users moves their names from the <b>Available Users</b> column to the <b>Assigned Users</b> column.
3. Assign users to the call pickup group.	You can assign users in two ways: <ul style="list-style-type: none"><li>To add all users listed in the <b>Available Users</b> column, click <b>Add All</b>.</li><li>To add one or more users to the <b>Available Users</b> column, select the desired names and click <b>Add</b>.</li></ul> To select a single user, click the desired name in the list. To select a range of names, click the first name, press and hold the <b>SHIFT</b> key, click the last name, and then release the <b>SHIFT</b> key.
4. Save your changes or exit without saving.	To save your changes, click <b>Save</b> .

## 8.6 Site Services – Group Calling Line ID

This menu is used to display either the group name or phone number or both the name and the number as the Calling Line ID (CLID) for outgoing calls. This information is displayed to recipients who have Caller Identification (Caller ID) on their phones.

When **Use Group Calling Line ID Policy** is active, the CLID settings for your group are used. When **Use Service Provider/Enterprise Calling Line ID Policy** is active, the global CLID settings for your Enterprise/Service Provider are used.

Steps	Details
1. Select a phone number for the group CLID.	Click the drop-down box for <b>Group Calling Line ID Number</b> to select a phone number that appears on Caller Identification. By default, <b>None</b> is selected, indicating that the party who receives the call cannot view the group's number or name. Enter the name for the group Calling Line ID in the <b>Calling Line ID Group Name is set:</b> text box.
2. Set the CLID Group Name.	To display the group name, instead of the user's name in the outgoing CLID, check the box marked <b>Use group name, instead of user name, in the outgoing Calling Line ID</b> .
3. Save your changes.	To save your changes, click <b>Save</b> .

## 8.7 Site Services – Group Paging

The Group Paging service allows authorized users (originators) to page a group of users (targets) by dialing a phone number or an extension. You may manage an existing Group Page. If you need to create a new Group Page number, please contact a Telesystem representative.

Use this page to select which Paging Group you would like to edit. Select a Paging Group from the drop-down menu to view its profile.

### 8.7.1 Group Paging Profile

You may use this section to modify your Paging Group Name. Make any necessary changes to the Name then click **Save** to keep changes. This is a required field.

### Paging Group Profile

Paging Group ID:	MarketingPG9999	Phone Number:	Extension: 9999
* Name:	Marketing Lab Page		

SAVE

### 8.7.2 Group Paging Calling Line ID

This configuration option is available to determine whether the CLID of the paging group or the CLID of the originator prefixed with a configurable string is delivered to the targets. CLID is delivered to all targets based on the configuration, when being paged.

#### To Manage:

1. Enter the **Last Name** and **First Name** you want to display on the recipient's Caller ID. These fields are required.



2. Select the **Department** this paging group belongs to from the drop-down menu.
3. **Language:** The default option is English.
4. Select the **Time Zone** from the drop down menu.
5. Select the **Network Class of Service**. Select to Allow All calls, Block International calls, or Block Long Distance and International calls.
6. Select Calling Line ID to deliver. You may select the **Paging group** or the **Originating user with prefix** (enter the digit string prefix in the field provided).
7. Select the **Confirmation tone sending timeout** in seconds from the drop-down menu. The default time is 1 second. You may select 1 through 20.
8. Click **Save** to keep changes.

### Calling Line ID

\* Last Name: Lab Page

\* First Name: Marketing

Department:

None

Language:

English

Time Zone:

(GMT-05:00) (US) Eastern Time

Network Class Of Service:

None

Calling Line ID to deliver:

☒ Paging group

☐ Originating user with prefix:

Confirmation tone sending timeout: 1

### 8.7.3 Group Paging – Paging Group Originators

The Paging Group Originators section will allow you to assign Originators (those initiating a group page) to the Paging Group. It contains two lists and a search field. In the **Available Originators** box on the left, you will see any users in your group available to be assigned as originators. The **Assigned Originators** box on the right, displays originators currently assigned to the selected Paging Group. The **Search** field may be used to locate a specific user. Search for an originator by selecting the **Group** and **Department**

in the drop-down menus; input the **Last Name** and/or **First Name** in the fields provided. Click **Search**.

### Paging Group Originators

Group ID:  
All Groups

Department:  
Any

Last Name:

First Name:

SEARCH

Available Originators		Assigned Originators
Snow, Jonathon (4199442074) Stevens, Amy (4199442072)		Dixon, Jay (4199442071) Michaels, Bridgette (4199442073) Smith, Jamie (4199442070)
	ADD >	
	< REMOVE	
	ADD ALL >>	
	<< REMOVE ALL	

Add an Originator to the Paging Group by selecting the name from the Available Originators box and then click the **Add** button. The originator will be moved to the Assigned Originators box. Remove an originator by selecting the name from the Assigned Originators box and then click the **Remove** button. The agent will be moved to the Available Originators box.

Add all Available Originators by clicking the **Add All** button. All Available Originators will move to the Assigned Originators box. Remove all Assigned Originators from the Paging Group by clicking the **Remove All** button. All Assigned Originators will move to the Available Originators box.

#### 8.7.4 Group Paging – Paging Group Targets

The Paging Group Targets section allows you to assign targets (the recipients of the group page) to the Paging Group. It contains two lists and a search field. In the **Available Targets** box on the left, you will see any users in your group available to be assigned as targets. The **Assigned Targets** box on the right, displays targets currently assigned to the selected Paging Group. The **Search** field may be used to locate a specific user. Search for a target by selecting the **Group** and **Department** in the drop-down menus;

input the **Last Name** and/or **First Name** in the fields provided. Click **Search**.

### Paging Group Targets

Group ID:  
All Groups

Department:  
Any

Last Name:

First Name:

SEARCH

Available Targets		Assigned Targets
Dixon, Jay (4199442071) Snow, Jonathon (4199442074)		Michaels, Bridgette (4199442073) Smith, Jamie (4199442070) Stevens, Amy (4199442072)
	ADD >	
	< REMOVE	
	ADD ALL >>	
	<< REMOVE ALL	

Add a Target to the Paging Group by selecting the name from the Available Targets box and then click the **Add** button. The Target will be moved to the Assigned Targets box. Remove a Target by selecting the name from the Assigned Targets box and then click the **Remove** button. The agent will be moved to the Available Targets box.

Add all Available Targets by clicking the **Add All** button. All Available Targets will move to the Assigned Targets box. Remove all Assigned Targets from the Paging Group by clicking the **Remove All** button. All Assigned Targets will move to the Available Targets box.

### 8.7.5 Group Paging – Call Policies

The Connected Line Identification Privacy on Redirected Calls option applies to redirections before and after answer including Call Forwarding, Blind Transfer, Transfer with Consultation, Sequential Ring, and Simultaneous Ring. This option does not apply to services that are not considered redirections such as Automatic Hold/Retrieve, Call Pickup, Call Park, Directed Call Pickup, Directed Call Pickup with Barge-in, all types of recalls, etc.

**To Manage:**

1. Select the type of privacy on redirected calls. For **Connected Line Identification Privacy on Redirected Calls**, select one of the following options:
  - **No Privacy (Default)**: When this option is selected, the redirecting party allows the Connected Line Identification Presentation (COLP) of the redirect destination to be sent to the remote party.
  - **Privacy For External Calls** – When this option is selected, the redirecting party allows the COLP of the redirect destination to be sent to the remote party only when the remote party is in the same Group/Enterprise as the redirecting party. If the remote party is not in the same Group/Enterprise as the redirecting party (In other words, is viewed as a Network subscriber), then the COLP sent to the remote party is the COLP of the redirecting party, not the COLP of the redirect destination.
  - **Privacy For All Calls** – When this option is selected the redirecting party never allows the COLP of the redirect destination to be sent to the remote party. The COLP sent to the remote party is always the COLP of the redirecting party, not the COLP of the redirect destination.
2. Select the policy for generating 181 SIP responses for redirected calls. For **Send Call Being Forwarded Response on Redirected Calls**, select one of the following options:
  - **Never (Default)** – When this option is selected and the Application Server redirects a call, the Application Server does not generate a 181 response.
  - **Internal Calls** – When this option is selected and the originating use is the same group or enterprise as the redirecting user, the Application Server proxies or generates a 181 response.
  - **All Calls** – If the user redirects a call, a 181 response is proxied or generated.  
**NOTE:** 181 responses received from network users are proxied, regardless of the setting for the user, if the Application Server is configured to do so at the system level.
3. Select the **Calling Line Identity for Redirected Calls** from the following options:
  - **Originating Identity**: When this is option is selected, the originating party's calling identity is provided to the redirection destination.
  - **Redirecting User Identity For External Redirections**: When this option is selected, the redirecting user's external calling identity is provided to the redirection destination if the redirection is external (not a group/enterprise redirection). If the redirection is internal, the originating party's calling identity is provided to the redirection destination.

- **Redirecting User Identity For All Redirections:** When this option is selected, the redirecting user's calling identity (internal or external as appropriate, based on the redirection destination) is provided to the redirection destination.
4. Click **Save** to keep changes.

### Call Policies

#### View or modify Call Policies for the User

Connected Line Identification Privacy on Redirected Calls:

- ☒ No Privacy
- ☐ Privacy For External Calls
- ☐ Privacy For All Calls

Send Call Being Forwarded Response on Redirected Calls:

- ☒ Never
- ☐ Internal Calls
- ☐ All Calls

Calling Line Identity for Redirected Calls:

- ☒ Originating Identity
- ☐ Redirecting User Identity For External Redirections
- ☐ Redirecting User Identity For All Redirections

SAVE

## 8.8 Site Services – Hunt Group

A Hunt Group automatically processes incoming calls received by a single phone number by distributing them among a group of users or agents.

Use this page to select which Hunt Group you would like to edit. Select a Hunt Group from the drop-down box to view its profile.

### 8.8.1 Hunt Group Profile

You may use the page to modify your Hunt Group.

Steps	Details
1. <b>Name the Hunt Group</b>	Enter a name for the Hunt Group in the <b>Name</b> box.
2. <b>Provide display names for Calling Line ID services.</b>	Provide first and last names for the Hunt Group in the <b>Calling Line ID First Name</b> and <b>Calling Line ID Last Name</b> boxes.

<p>3. Select a department.</p>	<p>Select a department from the Hunt Group from the <b>Department</b> drop-down list box. Select <b>None</b> to assign the Hunt Group to the group.</p> <p>Assigning the Hunt Group to a department allows department administrators to modify the Hunt Group.</p>
<p>4. Set the language of the Hunt Group.</p>	<p>Use the <b>Language</b> drop-down list box to select the language in which service-specific messages are played during calls to the Hunt Group.</p> <p>The default language is English (US English) unless configured otherwise.</p>
<p>5. Set the time zone of the Hunt Group.</p>	<p>Select a time zone from the <b>Time Zone</b> drop-down list.</p>
<p>6. Set Allow Call Waiting on Agents</p>	<p>Check or uncheck the <b>Allow Call Waiting on Agents</b> box. When Directory Number Hunting has been assigned to a Hunt Group, you may assign call waiting to Hunt Group agents so that they can handle more than one call directed to them, regardless of their Call Waiting feature status.</p>
<p>7. Select a call distribution policy for the Hunt Group.</p>	<p>Select one of the following options from the <b>Group Policy</b> control to determine how the system routes incoming calls to users in the group:</p> <ul style="list-style-type: none"> <li>• <b>Circular:</b> Incoming calls hunt through users in the order they appear on the list, starting with the user following the last user to receive a call. When the search reaches the end of the list, it loops back to the top and continues until it has tried all users.</li> <li>• <b>Regular:</b> Incoming calls hunt through users in the order they appear in the list, starting from the top each time.</li> <li>• <b>Simultaneous:</b> Incoming calls alert all users at the same time. The first user to answer handles the call.</li> <li>• <b>Uniform:</b> Incoming calls hunt through all users in order, starting with the user who has been idle the longest and ending with the user who most recently answered a call.</li> <li>• <b>Weighted Call Distribution:</b> Incoming calls are assigned to idle users based on percentages you assign on the Hunt Group's <b>Profile – Weighted Call Distribution page</b>. That page may be accessed by clicking on the <b>Edit</b> link.</li> </ul>

	<p>The <b>No Answer Settings</b> configure how the service behaves if a user does not answer a call.</p> <ul style="list-style-type: none"> <li>• Check the <b>Skip to next agent after [x] rings</b> check box to pass incoming unanswered calls to the next user after the specified number of rings, as determined by the current group policy.</li> <li>• Check the <b>Forward call after waiting [x] seconds</b> check box to forward calls that have not been answered by any user after the specified number of seconds to the phone number specified in the <b>Calls Forward to</b> text box. This box accepts values from 0 to 7200 seconds (2 hours).</li> <li>• Enter a number in the <b>Call Forward to</b> text box to transfer calls to the specified number when a call is not answered in the time specified by the <b>Forward call after waiting [x] seconds</b> control. Enter the FAX before the number to initiate one of the following services: <ul style="list-style-type: none"> <li>○ Calling Line ID Delivery Blocking per Call</li> <li>○ Calling Line ID Delivery Blocking Allowing per Call</li> <li>○ Direct Voice Mail Transfer</li> </ul> </li> </ul>
<p>8. <b>Complete the No Answer Settings area of the page.</b></p>	
<p>9. <b>If Configurable Hunt Group Name Presentation is enabled, specify the hunt group's Calling Line ID presentation.</b></p>	<p>Select one of the following options:</p> <ul style="list-style-type: none"> <li>• Select <b>Use the system default CLID configuration</b> to use the setting defined at the system level (displayed in parenthesis).</li> <li>• Select <b>Customize the CLID for this Hunt Group</b> to use the custom setting defined on this page and check or uncheck <b>Include the Hunt Group Name in the CLID</b>.</li> </ul>
<p>10. <b>Search for users to add as users for the Hunt Group.</b></p>	<p>Use the search bar provided to find the desired users. You may search for users by <b>Last Name</b>, <b>First Name</b>, or <b>Department</b>. Search results are listed in the <b>Available Users</b> column.</p>
<p>11. <b>Assign one or more users to the Hunt Group.</b></p>	<p>Assigning users moves their names from the <b>Available Users</b> column to the <b>Assigned Users</b> column.</p> <p>You may add users in two ways:</p> <ul style="list-style-type: none"> <li>• To add all users listed in the <b>Available Users</b> column, click <b>Add All</b>.</li> <li>• To add one or more users in the <b>Available Users</b> column, select the desired names and click <b>Add</b>.</li> </ul>
<p>12. <b>Re-order the list of users.</b></p>	<p>Depending on the policy assigned to this Hunt Group, the system may route calls to users in the order they are listed in the <b>Assigned Users</b> column.</p> <ul style="list-style-type: none"> <li>• To move a user up in the list, click the name in the <b>Assigned Users</b> column and click <b>Move Up</b>.</li> <li>• To move a user down in the order, click the name in the <b>Assigned Users</b> column and click <b>Move Down</b>.</li> </ul>
<p>13. <b>Save your changes or exit without saving.</b></p>	<p>To save your changes, click <b>Save</b>.</p>

### 8.8.2 Hunt Group – Calling Features

The Calling Features tab of the Hunt Group will display any of the calling features that have been assigned to the group. From here, you may view and modify which features are activated and deactivated or configure features.

### 8.8.3 Hunt Group – My Calls

The My Calls tab provides the option to Query Call Records and to obtain Call Detail Records (CDRs) for the Hunt Group.

#### 8.8.3.1 Query Call Details – Sort By

This option allows you to select specific criteria to generate your report.

The screenshot shows a web form titled "Report". It has several sections: "Sort by:" with a dropdown menu, "Date range" with a date picker, "Include:" with checkboxes for "Missed calls" and "Outbound calls", and "Search by full or partial telephone number:". The "Sort by:" dropdown menu is open, showing options: "Start date/time", "Answer time", "Release date/time", "Call duration", "User phone", "From phone", "To phone", "Call type", "Call result", and "Call category". The "Start date/time" option is selected.

The following options are available when sorting:

- Start date/time
- Answer time
- Release date/time
- Call duration
- User phone
- From phone
- To phone
- Call type
  - Call result
  - Call category

Each of these may be sorted in descending or ascending order.

#### 8.8.3.2 Query Call Details – Date Range

The date range allows calendar dates to be selected for the period of time you would like your results to include. Date range is formatted in the following format: MM/DD/YYYY. You may click the calendar icon next to each text box and select a date by clicking on it within the pop-up calendar.

The screenshot shows a web form titled "Date range" with "from: 10/21/2016" and "to: 10/28/2016". Below this is a calendar pop-up for "October 2016". The calendar shows days from Sunday to Saturday. The date 28 is highlighted. The form also includes "Include:" checkboxes, "Search by full or partial telephone number:", and an "Export" button.



### 8.8.3.3 Query Call Details – Include

You have the option to indicate the types of calls you'd like to include in the query. The following options are available:

- Inbound calls
- Missed calls
- Outbound calls

Check or uncheck the box preceding the option desired.

Include:
☒ Inbound calls
☐ Missed calls
☒ Outbound calls

### 8.8.3.4 Query Call Details – Search By

You have the option to only return results for a specific phone number or partial phone number. If you only want to see calls made to 419-724-9898, type 4197249898 in the field labeled **Search by full or partial telephone number**.

Search by full or  
partial telephone      4197249898  
number:

**Note:** When searching for a number, do not add dashes, periods, or spaces. Enter the ten digit phone number and perform the search. The output will match the search results exactly.

If you want to search for calls made to the 734 area code, you may type 734 into the same box.

**Note:** Anytime the string 734 shows up in your call history, it will return the result. For example, a search for **734** will return 4195550734 as well as 7345551212.

Search by full or  
partial telephone      734  
number:

### 8.8.3.5 Query Call Details – Create Report

The **Create Report** button will cause the query to run based on the criteria you have entered. The date will display at the bottom of the page in HTML format.

INDEX	ENTERPRISE	GROUP	DEPARTMENT	ACCOUNT CODE	USER ID	PHONE NUMBER	CALL TYPE	CALLING NUMBER	CALLED NUMBER	CALLER NAME	CALL DATE	CALL TIME	ANSWER DATE/TIME	RELEASE DATE/TIME	CALL DIRECTION	CALL DURATION	ANSWER INDICATOR	CALL CATEGORY	SPECIAL CALL TYPE
1	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal	+14197243718	+14199442077	Telesystem	10/27/2016	03:07 PM	10/27/2016 03:07 PM	10/27/2016 03:08 PM	Terminating	00:00:12	Yes		
2	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal	+14197243718	+14199442077	Telesystem	10/27/2016	03:07 PM	10/27/2016 03:07 PM	10/27/2016 03:07 PM	Terminating	00:00:12	Yes		
3	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal	+14197243718	+14199442077	Telesystem	10/27/2016	03:07 PM	10/27/2016 03:07 PM	10/27/2016 03:07 PM	Terminating	00:00:18	Yes		

The end result will contain the following information:

**Index**

**Enterprise**

**Group**

**Department**

**The index will identify which row of data you are displaying.**

Indicates what Enterprise within organization the User ID is assigned to.

Indicates what Group of the Enterprise hierarchy the User ID is assigned to.

Indicates what Department of the Group hierarchy the User ID is assigned to.

Account Code	Unsupported field
User ID	The User ID is your phone number set as a fully qualified domain name. Example 4195551212@combuckeye.com
Phone Number	Your phone number with the +1 prefix. For example +14195551212
Call Type	Displays <b>Normal</b> .
Calling Number	This will display the phone number party that originated the call. The format will display the same as the <b>Phone Number</b> field.
Called Number	This will display the phone number of the party that received the call. The format will display the same as the <b>Phone Number</b> field.
Caller Name	This will display the caller ID name of the party you are speaking with if that caller is part of your Enterprise Directory.
Call Date	Displays the date of the call. The date is displayed in MM/DD/YYYY format.
Call Time	Displays the time of the call. The time is displayed in a 12-hour format with a leading 0 for single digit hours. AM and PM is not specified.
Answer Date/Time	Displays the date when the call was initially answered with the time for when the call was answered. This information will only display if the receiving party actually answers the phone. Unanswered calls will not display a result. The date and time follow the same formatting as the <b>Call Date</b> and <b>Call Time</b> .
Release Date/Time	This displays the time when the call was terminated. An unanswered call will display a release date and time. The date and time follow the same formatting as the <b>Call Date</b> and <b>Call Time</b> .
Call Direction	Indicates if the call is <b>Originating</b> (outgoing) or <b>Terminating</b> (incoming) from your perspective.
Call Duration	Displays the amount of time you participated in the call. This is shown in HH:MM:SS format.
Answer Indicator	Indicates if the call was answered with a <b>Yes</b> or <b>No</b> , or if the call went to voicemail ( <b>Yes – Post Redirection</b> ).
Call Category	Values such as: <b>Interlata, intralata, local, other, private</b>
Special Call Type	Indicates if a call feature was used in order to handle this call.

**Note:** The HTML output is only capable of displaying 500 entries. If your report criterion exceeds 500 entries it is advised that you use the **Export** options available below or narrow your date range.


### 8.8.3.6 Query Call Details – Exporting

You have the option to export data via three methods:

- Email
- PDF
- CSV

#### 8.8.3.6.1 Exporting – Email to

The **Email to** option provides a user with the ability to select report criteria then specify an email address to which the report details will be sent to.



The screenshot shows a form titled "Export". Below the title, there is a label "Email to:" followed by a text input field containing the placeholder text "Enter email address here". To the right of the input field is a blue button labeled "SUBMIT".

After you enter the email address, click **Submit**. A notification will display to the right of the Submit button that the report is being generated and then a notice that will indicate the email sent.

If there is a problem with the email address in the **Email to** field, you will see a message that states **Please provide valid email**. The email address must follow the standard format such as: example@email.com.

#### 8.8.3.6.2 Exporting – Export to PDF

Using the **Export report to PDF** option will allow you to set the criteria and then generate the report with a PDF layout. This option is ideal if you're interested in a report that provides all of the included data in an easy to read PDF document. The data cannot be manipulated and the document can be shared and read by any device with a PDF reader.

To export to PDF, set the desired report criteria then click the **Submit** button next to **Export report to PDF**.



The screenshot shows two buttons side-by-side: "Export report to PDF" and a blue button labeled "SUBMIT".

Once you click on the download link, you will be presented with your browser's default download options which will determine where the file is saved to your local computer.



The screenshot shows three elements side-by-side: the text "Export report to PDF", a blue button labeled "SUBMIT", and a link labeled "Download PDF (2 Kb)".

**Note:** Additional software may be required to view the downloaded file. Please contact your system administrator for assistance.

#### 8.8.3.6.3 Exporting – Export to CSV

Using the **Export to CSV** option will allow you to generate a report and receive the output in a CSV (Comma Separated Value) format. The CSV format allows users to access the data in a spreadsheet editor such as Microsoft Excel®. From there, unnecessary data can be removed or additional data can be added. Users may sort the data from within the application or import the data to a database and manage it from software such as Microsoft Access®.

To export a report to CSV, set the desired report criteria then click the **Submit** button next to **Export report to CSV**.



The screenshot shows two buttons side-by-side: "Export report to CSV" and a blue button labeled "SUBMIT".

You will immediately see a notification that the system is preparing the report followed by a download link and the file size.

Export report to CSV

SUBMIT

Download CSV (1 Kb)

Once you click on the download link, you will be presented with your browser's default download options which will determine where the file is saved to your local computer.

**Note:** Additional software may be required to view and edit the downloaded file. Please contact your system administrator for assistance.

#### 8.8.4 Hunt Group My Calls – Last 20 Calls

The **Last 20 Calls** option will automatically generate a report of the last 20 calls associated with the Hunt Group. The data is provided in HTML format. You will then have the option to email the data or export it to PDF or CSV.

### Export

Email to: 

SUBMIT

Export report to PDF 

SUBMIT

Export report to CSV 

SUBMIT

INDEX	ENTERPRISE	GROUP	DEPARTMENT	ACCOUNT CODE	USER ID	PHONE NUMBER	CALL TYPE
1	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal
2	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal
3	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal

#### 8.8.5 Hunt Group – Utilities

The Hunt Group Utilities tab contains the following menus:

- Enterprise Directory
- Document Repository
- Registrations
- Feature Access Codes

### 8.8.5.1 Hunt Group – Enterprise Directory

The Enterprise directory menu provides you with a data table of the entire enterprise directory. The directory displays the following information regarding each user or group where applicable:

- Name
- Number
- Extension
- Mobile (phone number)
- Email Address
- Department
- Group ID
- Yahoo ID

You may search for a specific entry in the directory using the available search fields. Entries may be searched for by Last Name, First Name, or Phone Number. Search results may be expanded or narrowed using the drop-down menu with the options: **Starts With**, **Contains**, and **Equal To**.

From this menu, you also have the links available to view the Enterprise Directory Summary as a separate web page or download it as a PDF.

Utilities

ENTERPRISE DIRECTORY DOCUMENT REPOSITORY REGISTRATIONS FEATURE ACCESS CODES

Enterprise Directory

Enterprise Directory Summary Enterprise Directory Detail  
Enterprise Directory Summary - PDF Enterprise Directory Detail - PDF

Last Name Starts With SEARCH

NAME	NUMBER	EXTENSION	MOBILE	EMAIL ADDRESS	DEPARTMENT	GROUP ID	YAHOO ID
BMG Hunt Group (Hunt Group)	4199442075	2075			Marketing (Marketing)	Marketing	
Burgers, Johnny's	+1-4195555555	5555				Marketing	

### 8.8.5.2 Hunt Group Document Repository

Document Repository acts as a centralized repository to keep track of help guides, templates, etc.

### 8.8.5.3 Hunt Group Registrations

This page is used to view your static and dynamic registrations.

The following table explains the key fields that may appear on this page:

Item	Description
Endpoint Type	The SIP device or virtual user endpoint at which the service is deployed. Valid types include Primary, Video Add On, and Shared Call Appearance.
Line/Port	The line, port number or SIP address of the endpoint location. This information is dependent on the identity/device profile's type.
Identity/Device Profile name	The Identity/Device Profile in the system assigned to the user.
URI	The Universal Resource Indicator (URI) identifying the device. Both static and dynamic registrations are possible, depending on the device profile.
Expiration	The registration expiry date, for dynamic registrations.

### 8.8.5.4 Hunt Group Feature Access Codes

The Feature Access Codes menu displays touch tone codes for features that may be used in conjunction with your Hunt Group.

Utilities		
ENTERPRISE DIRECTORY DOCUMENT REPOSITORY REGISTRATIONS <b>FEATURE ACCESS CODES</b>		
Feature Access Codes		
FEATURE ACCESS CODE NAME	MAIN (REQUIRED) ALTERNATE (OPTIONAL)	
Call Park	*68	
Call Park Retrieve	*88	
Call Pickup	*98	
EOCP Sustained Authorization Code Lock	*37	
EOCP Sustained Authorization Code Unlock	*47	
FMFM Call Push	*26	
Group Call Park	#58	
Music On Hold Per-Call Deactivation	*60	
Per-Call Account Code	*71	

## 8.9 Site Services – Instant Group Call

An Instant Group Call enables users to call a group of users on demand with a single extension, where the users may be a part of the same group or external users. Instant Group Call profiles may only be added and removed by Telesystem administrators by calling 419-724-9898.

### 8.9.1 Editing an Instant Group Call Profile

Select the Instant Group Call you want to manage. Use the following steps to assist you in managing an Instant Group Call:

Steps	Details
1. <b>Change password.</b>	Enter a new password, or click <b>Generate</b> to have one generated automatically.
2. <b>Name the instant group call.</b>	Enter a name for the instant group call in the Name box.
3. <b>Provide display names for Calling Line ID services.</b>	Provide first and last names for the instant group call in the Calling Line ID First Name and Calling Line ID Last Name boxes.

<b>4. Select a department.</b>	<p>Select a department for the Instant Group Call from the Department drop-down list box. Select <b>None</b> to assign the Instant Group Call to your group.</p>
<b>5. Set the language of the Instant Group Call.</b>	<p>Assigning the instant group call to a department allows department administrators to modify the instant group call. Use the Language drop-down list box to select the language in which service-specific messages are played during calls to the instant group call.</p> <p>The default language is English (US English) unless configured otherwise.</p>
<b>6. Set the time zone of the Instant Group Call.</b>	<p>Select a time zone from the Time Zone drop-down list.</p>
<b>7. Specify the maximum call time for unanswered calls.</b>	<p>Check Enable Maximum Call Time for Unanswered Call and type the number of minutes in the input box.</p>
<b>8. Assign one or more users in the Instant User Call Group List.</b>	<p>Enter the users' phone number or SIP addresses in separate input boxes to include in the User Call Group List. Prefix phone number with the feature access code for Calling Line ID Blocking, Calling Line ID Allow, or Diversion Inhibitor to activate these features.</p>
<b>9. Save you changes or exit without saving.</b>	<p>To save your changes, click <b>Save</b>.</p>



## Profile Settings

## Password reset

User Password: \_\_\_\_\_ GENERATE

Re-type Password: \_\_\_\_\_ SHOW/HIDE PASSWORD

Instant Group Call ID: MarketICGTest Phone Number: Extension: 4567

\* Name: ICG Test

\* Calling Line ID Last Name: Test

\* Calling Line ID First Name: ICG

Department: None ▾

Language: English ▾

Time Zone: (GMT-05:00) (US) Eastern Time ▾

☒ Enable Maximum Call Time for Unanswered Calls 1 Minute(s)

## Instant Group Call User List

Phone Number / SIP-URI: \_\_\_\_\_ ADD

☐ 4199442072 (in group)

☐ 4199442073 (in group)

DELETE

## Call Policies

View or modify Call Policies for the User

Connected Line Identification Privacy on  
Redirected Calls:

- ☒ No Privacy
- ☐ Privacy For External Calls
- ☐ Privacy For All Calls

Send Call Being Forwarded Response on  
Redirected Calls:

- ☒ Never
- ☐ Internal Calls
- ☐ All Calls

SAVE

### 8.9.2 Instant Group Call – Calling Features

The Calling Features tab of the Instant Group Call will display any of the calling features which have been assigned to the group. From here, you may view and modify which features are activated and deactivated or configure features.

### 8.9.3 Instant Group Call – My Calls

The My Calls tab provides the option to Query Call Details to obtain the Call Detail Records (CDRs) for the Instant Group Call.

#### 8.9.3.1 Query Call Details – Sort By

This option allows you to select specific criteria to generate your report.

The following options are available when sorting:

- Start date/time
- Answer time
- Release date/time
- Call duration
- User phone
- From phone
- To phone
- Call type
  - Call result
  - Call category

Each of these may be sorted in descending or ascending order.

#### 8.9.3.2 Query Call Details – Date Range

The date range allows calendar dates to be selected for the period of time you would like your results to include. Date range is formatted in the following format: MM/DD/YYYY. You may click the calendar icon next to each text box and select a date by clicking on it within the pop-up calendar.

### 8.9.3.3 Query Call Details – Include

You have the option to indicate the types of calls you'd like to include in the query. The following options are available:

- Inbound calls
- Missed calls
- Outbound calls

Check or uncheck the box preceding the option desired.

Include: ☒ Inbound calls ☐ Missed calls ☒ Outbound calls

### 8.9.3.4 Query Call Details – Search By

You have the option to only return results for a specific phone number or partial phone number. If you only want to see calls made to 419-724-9898, type 4197249898 in the field labeled **Search by full or partial telephone number**.

Search by full or  
partial telephone 4197249898  
number:

**Note:** When searching for a number, do not add dashes, periods, or spaces. Enter the ten digit phone number and perform the search. The output will match the search results exactly.

If you want to search for calls made to the 734 area code, you may type 734 into the same box.

**Note:** Anytime the string 734 shows up in your call history, it will return the result. For example, a search for **734** will return 4195550734 as well as 7345551212.

Search by full or  
partial telephone 734  
number:

### 8.9.3.5 Query Call Details – Create Report

The **Create Report** button will cause the query to run based on the criteria you have entered. The date will display at the bottom of the page in HTML format.

INDEX	ENTERPRISE	GROUP	DEPARTMENT	ACCOUNT CODE	USER ID	PHONE NUMBER	CALL TYPE	CALLING NUMBER	CALLED NUMBER	CALLER NAME	CALL DATE	CALL TIME	ANSWER DATE/TIME	RELEASE DATE/TIME	CALL DIRECTION	CALL DURATION	ANSWER INDICATOR	CALL CATEGORY	SPECIAL CALL TYPE
1	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal	+14197243718	+14199442077	Telesystem	10/27/2016	03:07 PM	10/27/2016 03:07 PM	10/27/2016 03:08 PM	Terminating	00:00:12	Yes		
2	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal	+14197243718	+14199442077	Telesystem	10/27/2016	03:07 PM	10/27/2016 03:07 PM	10/27/2016 03:07 PM	Terminating	00:00:12	Yes		
3	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal	+14197243718	+14199442077	Telesystem	10/27/2016	03:07 PM	10/27/2016 03:07 PM	10/27/2016 03:07 PM	Terminating	00:00:18	Yes		

The end result will contain the following information:

Index  
Enterprise  
Group

**The index will identify which row of data you are displaying.**

Indicates what Enterprise within organization the User ID is assigned to.

Indicates what Group of the Enterprise hierarchy the User ID is assigned to.

<b>Department</b>	Indicates what Department of the Group hierarchy the User ID is assigned to.
<b>Account Code</b>	Unsupported field
<b>User ID</b>	The User ID is your phone number set as a fully qualified domain name. Example 4195551212@combuckeye.com
<b>Phone Number</b>	Your phone number with the +1 prefix. For example +14195551212
<b>Call Type</b>	Displays <b>Normal</b> .
<b>Calling Number</b>	This will display the phone number party that originated the call. The format will display the same as the <b>Phone Number</b> field.
<b>Called Number</b>	This will display the phone number of the party that received the call. The format will display the same as the <b>Phone Number</b> field.
<b>Caller Name</b>	This will display the caller ID name of the party you are speaking with if that caller is part of your Enterprise Directory.
<b>Call Date</b>	Displays the date of the call. The date is displayed in MM/DD/YYYY format.
<b>Call Time</b>	Displays the time of the call. The time is displayed in a 12-hour format with a leading 0 for single digit hours. AM and PM is not specified.
<b>Answer Date/Time</b>	Displays the date when the call was initially answered with the time for when the call was answered. This information will only display if the receiving party actually answers the phone. Unanswered calls will not display a result. The date and time follow the same formatting as the <b>Call Date</b> and <b>Call Time</b> .
<b>Release Date/Time</b>	This displays the time when the call was terminated. An unanswered call will display a release date and time. The date and time follow the same formatting as the <b>Call Date</b> and <b>Call Time</b> .
<b>Call Direction</b>	Indicates if the call is <b>Originating</b> (outgoing) or <b>Terminating</b> (incoming) from your perspective.
<b>Call Duration</b>	Displays the amount of time you participated in the call. This is shown in HH:MM:SS format.
<b>Answer Indicator</b>	Indicates if the call was answered with a <b>Yes</b> or <b>No</b> , or if the call went to voicemail ( <b>Yes – Post Redirection</b> ).
<b>Call Category</b>	Values such as: <b>Interlata, intralata, local, other, private</b>
<b>Special Call Type</b>	Indicates if a call feature was used in order to handle this call.

**Note:** The HTML output is only capable of displaying 500 entries. If your report criterion exceeds 500 entries it is advised that you use the **Export** options available below or narrow your date range.


### 8.9.3.6 Query Call Details – Exporting

You have the option to export data via three methods:

- Email
- PDF
- CSV

#### 8.9.3.6.1 Exporting – Email to

The **Email to** option provides a user with the ability to select report criteria then specify an email address to which the report details will be sent to.

A screenshot of a web form titled "Export". It contains a label "Email to:" followed by a text input field with the placeholder text "Enter email address here". To the right of the input field is a blue button with the text "SUBMIT" in white capital letters.

After you enter the email address, click **Submit**. A notification will display to the right of the Submit button that the report is being generated and then a notice that will indicate the email sent.

If there is a problem with the email address in the **Email to** field, you will see a message that states **Please provide valid email**. The email address must follow the standard format such as: example@email.com.

#### 8.9.3.6.2 Exporting – Export to PDF

Using the **Export report to PDF** option will allow you to set the criteria and then generate the report with a PDF layout. This option is ideal if you're interested in a report that provides all of the included data in an easy to read PDF document. The data cannot be manipulated and the document can be shared and read by any device with a PDF reader.

To export to PDF, set the desired report criteria then click the **Submit** button next to **Export report to PDF**.

A screenshot showing two buttons side-by-side. The first button is light blue with the text "Export report to PDF" in dark blue. The second button is dark blue with the text "SUBMIT" in white capital letters.

Once you click on the download link, you will be presented with your browser's default download options which will determine where the file is saved to your local computer.

A screenshot showing three elements in a row. On the left is a light blue button with the text "Export report to PDF" in dark blue. In the middle is a dark blue button with the text "SUBMIT" in white capital letters. On the right is a light blue button with the text "Download PDF (2 Kb)" in dark blue.

**Note:** Additional software may be required to view the downloaded file. Please contact your system administrator for assistance.

#### 8.9.3.6.3 Exporting – Export to CSV

Using the **Export to CSV** option will allow you to generate a report and receive the output in a CSV (Comma Separated Value) format. The CSV format allows users to access the data in a spreadsheet editor such as Microsoft Excel®. From there, unnecessary data can be removed or additional data can be added. Users may sort the data from within the application or import the data to a database and manage it from software such as Microsoft Access®.

To export a report to CSV, set the desired report criteria then click the **Submit** button next to **Export report to CSV**.

A screenshot showing two buttons side-by-side. The first button is light blue with the text "Export report to CSV" in dark blue. The second button is dark blue with the text "SUBMIT" in white capital letters.

You will immediately see a notification that the system is preparing the report followed by a download link and the file size.

Export report to CSV

SUBMIT

Download CSV (1 Kb)

Once you click on the download link, you will be presented with your browser's default download options which will determine where the file is saved to your local computer.

**Note:** Additional software may be required to view and edit the downloaded file. Please contact your system administrator for assistance.

#### 8.9.4 Instant Group Call - My Calls – Last 20 Calls

The **Last 20 Calls** option will automatically generate a report of the last 20 calls associated with the Instant Group Call. The data is provided in HTML format. You also have the option to email the data or export it to PDF or CSV.

Export

Email to: 

SUBMIT

Export report to PDF 

SUBMIT

Export report to CSV 

SUBMIT

INDEX	ENTERPRISE	GROUP	DEPARTMENT	ACCOUNT CODE	USER ID	PHONE NUMBER	CALL TYPE
1	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal
2	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal
3	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal

### 8.9.5 Instant Group Call – Utilities

The Instant Group Call Utilities tab contains the following menus:

- Enterprise Directory
- Document Repository
- Registrations
- Feature Access Codes

#### 8.9.5.1 Instant Group Call – Enterprise Directory

The Enterprise Directory menu provides a data table of the entire enterprise directory. The directory displays the following information regarding each user or group where applicable:

- Name
- Number
- Extension
- Mobile (phone number)
- Email Address
- Department
- Group ID
- Yahoo ID

You may search for a specific entry in the directory using the available search fields. Entries may be searched for by Last Name, First Name, or Phone Number. Search results may be expanded or narrowed using the drop-down menu with the options: **Starts With**, **Contains**, and **Equal To**.

From this menu, you also have the links available to view the Enterprise Directory Summary as a separate web page or download it as a PDF.

Utilities

ENTERPRISE DIRECTORY DOCUMENT REPOSITORY REGISTRATIONS FEATURE ACCESS CODES

Enterprise Directory

[Enterprise Directory Summary](#) [Enterprise Directory Detail](#)  
[Enterprise Directory Summary - PDF](#) [Enterprise Directory Detail - PDF](#)

Last Name ▼ Starts With ▼ SEARCH

NAME	NUMBER	EXTENSION	MOBILE	EMAIL ADDRESS	DEPARTMENT	GROUP ID	YAHOO ID
BMG Hunt Group (Hunt Group)	4199442075	2075			Marketing (Marketing)	Marketing	
Burgers, Johnny's	+1-4195555555	5555				Marketing	

#### 8.9.5.2 Instant Group Call Document Repository

Document Repository act as a centralized repository to keep track of help guides, templates, etc.

### 8.9.5.3 Instant Group Call Registrations

This page is used to view your static and dynamic registrations.

The following table explains the key fields that may appear on this page:

Item	Description
Endpoint Type	The SIP device or virtual user endpoint at which the service is deployed. Valid types include Primary, Video Add On, and Shared Call Appearance.
Line/Port	The line, port number or SIP address of the endpoint location. This information is dependent on the identity/device profile's type.
Identity/Device Profile name	The Identity/Device Profile in the system assigned to the user.
URI	The Universal Resource Indicator (URI) identifying the device. Both static and dynamic registrations are possible, depending on the device profile.
Expiration	The registration expiry date, for dynamic registrations.

### 8.9.5.4 Instant Group Call Feature Access Codes

The Feature Access Codes menu displays touch tone codes for features that may be used in conjunction with your Instant Group Call. This list may vary for each Instant Group Call depending on which features are assigned to the group.



Utilities		
<a href="#">ENTERPRISE DIRECTORY</a> <a href="#">DOCUMENT REPOSITORY</a> <a href="#">REGISTRATIONS</a> <a href="#">FEATURE ACCESS CODES</a>		
Feature Access Codes		
FEATURE ACCESS CODE NAME	MAIN (REQUIRED)	ALTERNATE (OPTIONAL)
Call Park	*68	
Call Park Retrieve	*88	
Call Pickup	*98	
EOCP Sustained Authorization Code Lock	*37	
EOCP Sustained Authorization Code Unlock	*47	
FMFM Call Push	*26	
Group Call Park	#58	
Music On Hold Per-Call Deactivation	*60	
Per-Call Account Code	*71	

## 8.10 Site Services – Meet-Me Conferencing

The Meet-Me Conferencing feature will allow you to view and manage conference and conference bridges from within the Hosted VoIP Phone System Admin Portal.

Select a conference from the drop-down box to access the conference configuration.

### 8.10.1 Meet-Me Conferencing Profile

The following steps may be used to configure the Meet-Me Conferencing Profile:

Steps	Details
1. Name the conference bridge	In the <b>Name</b> box, enter a name for the bridge. This is a required field.
2. Provide display names for the Calling Line ID (CLID) services.	In the <b>Calling Line ID First Name</b> and <b>Calling Line ID Last Name</b> boxes, enter first and last names for the conference bridge. This is a required field.
3. Select a department.	From the <b>Department</b> drop-down list, select a department. Select <b>None</b> to assign the conference bridge to the group.  Assigning a conference bridge to a department allows department administrators to modify the bridge.

<p>4. Set the language of the conference bridge.</p>	<p>From the <b>Language</b> drop-down list, select the language in which service-specific messages are played.</p> <p>The default language is English (U.S. English) unless otherwise configured.</p>
<p>5. Set the time zone of the conference bridge.</p>	<p>From the <b>Time Zone</b> drop-down list, select a time zone.</p>
<p>6. Provide the operator's phone number.</p>	<p>In the <b>Operator Phone Number</b> box, enter the operator's phone number.</p>
<p>7. Allocate ports to this conference bridge.</p>	<p>In the <b>Allocated Ports To This Bridge</b> box, specify the number of ports to allocate to this conference bridge. You may select <b>Unlimited</b> (if available) or enter the number of ports.</p> <p><b>NOTE:</b> The maximum number of ports you may allocate is displayed above as <b>Maximum Ports Available To This Bridge</b>.</p> <p>To allow out-dialing to individual participants, check <b>Allow Individual Outdial</b>.</p> <p>Check <b>Allow Individual Outdial</b>.</p>
<p>8. Allow individual outdial.</p>	<p>When this option is enabled, direct links to conference are included in e-mail invitations for conferences created on this bridge.</p>
<p>9. Restrict the length of conferences created on this bridge.</p>	<p>Check <b>maximum Conference Duration [x] hours [y] minutes</b> and select the hours and minutes from the drop-down lists.</p> <p>The maximum duration of a conference cannot be changed to a value lower than the length of the longest existing conference scheduled on this bridge.</p> <p>Check <b>Play Warning Prompt [x] minutes before the conference end</b> and select the number of minutes from the drop-down list.</p>
<p>10. Enable a warning prompt.</p>	<p>When this option is enabled:</p> <ul style="list-style-type: none"> <li>For scheduled conferences, a warning message is played [x] minutes before the scheduled end of the conference.</li> <li>For reservationless conferences, a warning message is played [x] minutes before the <b>Maximum Conference Duration</b> configured on this page. If the <b>Maximum Conference Duration</b> is not configured, no warning message is played.</li> </ul>

### 11. Specify users who can host conferences on this bridge.

- Search for available users. Click **Search** to display all available users, or enter your search criteria and then click **Search** to display specific available users.
- Select users to assign as hosts. In the **Available Users** column, select the names you want and click **Add**. The selected users are moved to the **Conference Hosts** column.
- Using **Add**, **Add All**, **Remove**, and **Remove All**, move users between the **Available Users** and **Conference Hosts** columns until only the users you want to be hosts are listed in the **Conference Hosts** column.

### 12. Save your changes or exit without saving.

Click **Save** to keep your changes. To exit without saving, select another page.

## 8.10.2 Meet-Me Conferencing – Calling Features

The Calling Features tab of Meet-Me Conferencing will display any of the calling features that have been assigned to the group. From here, you may view and modify which features are activated and deactivated.

## 8.10.3 Meet-Me Conferencing – My Calls

The My Calls tab provides you with the ability to Query call Details and obtain Call Detail Records (CDRs) for Meet-Me Conferencing.

### 8.10.3.1 Query Call Details – Sort By

This option allows you to select specific criteria to generate your report.

The following options are available when sorting:

- Start date/time
- Answer time
- Release date/time
- Call duration
- User phone
- From phone
- To phone
- Call type
  - Call result
  - Call category

### 8.10.3.2 Query Call Details – Date Range

The date range allows calendar dates to be selected for the period of time you would like your results to include. Date range is formatted in the following format: MM/DD/YYYY. You may click the calendar icon next to each text box and select a date by clicking on it within the pop-up calendar.

Date range from: 10/21/2016 to: 10/28/2016 (mn)

Include: ☒ In ☐ Ir ☐ O October 2016

Search by full or partial telephone number:

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

Export

### 8.10.3.3 Query Call Details – Include

You have the option to indicate the types of calls you'd like to include in the query. The following options are available:

- Inbound calls
- Missed calls
- Outbound calls

Check or uncheck the box preceding the option desired.

Include: ☒ Inbound calls ☐ Missed calls ☒ Outbound calls

### 8.10.3.4 Query Call Details – Search By

You have the option to only return results for a specific phone number or partial phone number. If you only want to see calls made to 419-724-9898, type 4197249898 in the field labeled **Search by full or partial telephone number**.

Search by full or partial telephone number: 4197249898

number:

**Note:** When searching for a number, do not add dashes, periods, or spaces. Enter the ten digit phone number and perform the search. The output will match the search results exactly.

If you want to search for calls made to the 734 area code, you may type 734 into the same box.

**Note:** Anytime the string 734 shows up in your call history, it will return the result. For example, a search for **734** will return 4195550734 as well as 7345551212.

Search by full or partial telephone number: 734

number:

### 8.10.3.5 Query Call Details – Create Report

The **Create Report** button will cause the query to run based on the criteria you have entered. The date will display at the bottom of the page in HTML format.

INDEX	ENTERPRISE	GROUP	DEPARTMENT	ACCOUNT CODE	USER ID	PHONE NUMBER	CALL TYPE	CALLING NUMBER	CALLED NUMBER	CALLER NAME	CALL DATE	CALL TIME	ANSWER DATE/TIME	RELEASE DATE/TIME	CALL DIRECTION	CALL DURATION	ANSWER INDICATOR	CALL CATEGORY	SPECIAL CALL TYPE
1	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal	+14197243718	+14199442077	Telesystem	10/27/2016	03:07 PM	10/27/2016 03:07 PM	10/27/2016 03:08 PM	Terminating	00:00:12	Yes		
2	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal	+14197243718	+14199442077	Telesystem	10/27/2016	03:07 PM	10/27/2016 03:07 PM	10/27/2016 03:07 PM	Terminating	00:00:12	Yes		
3	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal	+14197243718	+14199442077	Telesystem	10/27/2016	03:07 PM	10/27/2016 03:07 PM	10/27/2016 03:07 PM	Terminating	00:00:18	Yes		

The end result will contain the following information:

<b>Index</b>	<b>The index will identify which row of data you are displaying.</b>
<b>Enterprise</b>	Indicates what Enterprise within organization the User ID is assigned to.
<b>Group</b>	Indicates what Group of the Enterprise hierarchy the User ID is assigned to.
<b>Department</b>	Indicates what Department of the Group hierarchy the User ID is assigned to.
<b>Account Code</b>	Unsupported field
<b>User ID</b>	The User ID is your phone number set as a fully qualified domain name. Example <i>4195551212@combuckeye.com</i>
<b>Phone Number</b>	Your phone number with the +1 prefix. For example <i>+14195551212</i>
<b>Call Type</b>	Displays <b>Normal</b> .
<b>Calling Number</b>	This will display the phone number party that originated the call. The format will display the same as the <b>Phone Number</b> field.
<b>Called Number</b>	This will display the phone number of the party that received the call. The format will display the same as the <b>Phone Number</b> field.
<b>Caller Name</b>	This will display the caller ID name of the party you are speaking with if that caller is part of your Enterprise Directory.
<b>Call Date</b>	Displays the date of the call. The date is displayed in MM/DD/YYYY format.
<b>Call Time</b>	Displays the time of the call. The time is displayed in a 12-hour format with a leading 0 for single digit hours. AM and PM is not specified.
<b>Answer Date/Time</b>	Displays the date when the call was initially answered with the time for when the call was answered. This information will only display if the receiving party actually answers the phone. Unanswered calls will not display a result. The date and time follow the same formatting as the <b>Call Date</b> and <b>Call Time</b> .
<b>Release Date/Time</b>	This displays the time when the call was terminated. An unanswered call will display a release date and time. The date and time follow the same formatting as the <b>Call Date</b> and <b>Call Time</b> .
<b>Call Direction</b>	Indicates if the call is <b>Originating</b> (outgoing) or <b>Terminating</b> (incoming) from your perspective.
<b>Call Duration</b>	Displays the amount of time you participated in the call. This is shown in HH:MM:SS format.
<b>Answer Indicator</b>	Indicates if the call was answered with a <b>Yes</b> or <b>No</b> , or if the call went to voicemail ( <b>Yes – Post Redirection</b> ).
<b>Call Category</b>	Values such as: <b>Interlata, intralata, local, other, private</b>
<b>Special Call Type</b>	Indicates if a call feature was used in order to handle this call.

**Note:** The HTML output is only capable of displaying 500 entries. If your report criterion exceeds 500 entries it is advised that you use the **Export** options available below or narrow your date range.

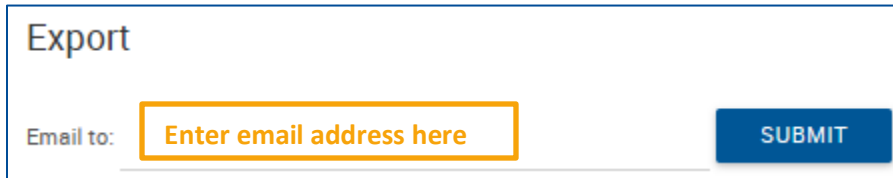
### 8.10.3.6 Query Call Details – Exporting

You have the option to export data via three methods:

- Email
- PDF
- CSV

#### 8.10.3.6.1 Exporting – Email to

The **Email to** option provides a user with the ability to select report criteria then specify an email address to which the report details will be sent to.



The screenshot shows a form titled "Export". Below the title, there is a label "Email to:" followed by a text input field containing the placeholder text "Enter email address here". To the right of the input field is a blue button labeled "SUBMIT".

After you enter the email address, click **Submit**. A notification will display to the right of the Submit button that the report is being generated and then a notice that will indicate the email sent.

If there is a problem with the email address in the **Email to** field, you will see a message that states **Please provide valid email**. The email address must follow the standard format such as: example@email.com.

#### 8.10.3.6.2 Exporting – Export to PDF

Using the **Export report to PDF** option will allow you to set the criteria and then generate the report with a PDF layout. This option is ideal if you're interested in a report that provides all of the included data in an easy to read PDF document. The data cannot be manipulated and the document can be shared and read by any device with a PDF reader.

To export to PDF, set the desired report criteria then click the **Submit** button next to **Export report to PDF**.



The screenshot shows two buttons side-by-side: "Export report to PDF" and a blue button labeled "SUBMIT".

Once you click on the download link, you will be presented with your browser's default download options which will determine where the file is saved to your local computer.



The screenshot shows three elements side-by-side: "Export report to PDF", a blue button labeled "SUBMIT", and a link labeled "Download PDF (2 Kb)".

**Note:** Additional software may be required to view the downloaded file. Please contact your system administrator for assistance.

#### 8.10.3.6.3 Exporting – Export to CSV

Using the **Export to CSV** option will allow you to generate a report and receive the output in a CSV (Comma Separated Value) format. The CSV format allows users to access the data in a spreadsheet editor such as Microsoft Excel®. From there, unnecessary data can be removed or additional data can be added. Users may sort the data from within the application or import the data to a database and manage it from software such as Microsoft Access®.

To export a report to CSV, set the desired report criteria then click the **Submit** button next to **Export report to CSV**.

Export report to CSV **SUBMIT**

You will immediately see a notification that the system is preparing the report followed by a download link and the file size.

Export report to CSV **SUBMIT** [Download CSV \(1 Kb\)](#)

Once you click on the download link, you will be presented with your browser's default download options which will determine where the file is saved to your local computer.

**Note:** Additional software may be required to view and edit the downloaded file. Please contact your system administrator for assistance.

#### 8.10.4 Meet-Me Conferencing – My Calls – Last 20 Calls

The Last 20 Calls option will automatically generate a report of the last 20 calls associated with the Meet-Me Conference. The data is provided in HTML format. You also have the option to email the data or export it to PDF or CSV.

### Export

Email to:  **SUBMIT**

Export report to PDF **SUBMIT**

Export report to CSV **SUBMIT**

INDEX	ENTERPRISE	GROUP	DEPARTMENT	ACCOUNT CODE	USER ID	PHONE NUMBER	CALL TYPE
1	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal
2	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal
3	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal

### 8.10.5 Meet-Me Conferencing – Utilities

The Meet-Me Conferencing Utilities tab contains the following menus:

- Enterprise Directory
- Document Repository
- Registrations
- Feature Access Codes

#### 8.10.5.1 Meet-Me Conferencing – Enterprise Directory

The Enterprise Directory menu provides a data table of the entire enterprise directory. The directory displays the following information regarding each user or group where applicable:

- Name
- Number
- Extension
- Mobile (phone number)
- Email Address
- Department
- Group ID
- Yahoo ID

You may search for a specific entry in the directory using the available search fields. Entries may be searched for by Last Name, First Name, or Phone Number. Search results may be expanded or narrowed using the drop-down menu with the options: **Starts With**, **Contains**, and **Equal To**.

From this menu, you also have the links available to view the Enterprise Directory Summary as a separate web page or download it as a PDF.

Utilities

ENTERPRISE DIRECTORY DOCUMENT REPOSITORY REGISTRATIONS FEATURE ACCESS CODES

Enterprise Directory

Enterprise Directory Summary Enterprise Directory Detail  
Enterprise Directory Summary - PDF Enterprise Directory Detail - PDF

Last Name Starts With SEARCH

NAME	NUMBER	EXTENSION	MOBILE	EMAIL ADDRESS	DEPARTMENT	GROUP ID	YAHOO ID
BMG Hunt Group (Hunt Group)	4199442075	2075			Marketing (Marketing)	Marketing	
Burgers, Johnny's	+1-4195555555	5555				Marketing	

#### 8.10.5.2 Meet-Me Conference - Document Repository

Document Repository act as a centralized repository to keep track of help guides, templates, etc.



### 8.10.5.3 Meet-Me Conference - Registrations

This page is used to view your static and dynamic registrations.

The following table explains the key fields that may appear on this page:

Item	Description
Endpoint Type	The SIP device or virtual user endpoint at which the service is deployed. Valid types include Primary, Video Add On, and Shared Call Appearance.
Line/Port	The line, port number or SIP address of the endpoint location. This information is dependent on the identity/device profile's type.
Identity/Device Profile name	The Identity/Device Profile in the system assigned to the user.
URI	The Universal Resource Indicator (URI) identifying the device. Both static and dynamic registrations are possible, depending on the device profile.
Expiration	The registration expiry date, for dynamic registrations.

### 8.10.5.4 Meet-Me Conference - Feature Access Codes

The Feature Access Codes menu displays touch tone codes for features that may be used in conjunction with your Meet-Me Conference. This list may vary for each conference depending on which features are assigned to the group.

## Utilities

ENTERPRISE DIRECTORY DOCUMENT REPOSITORY REGISTRATIONS **FEATURE ACCESS CODES**

## Feature Access Codes

FEATURE ACCESS CODE NAME	MAIN (REQUIRED) ALTERNATE (OPTIONAL)
Call Park	*68
Call Park Retrieve	*88
Call Pickup	*98
EOCP Sustained Authorization Code Lock	*37
EOCP Sustained Authorization Code Unlock	*47
FMFM Call Push	*26
Group Call Park	#58
Music On Hold Per-Call Deactivation	*60
Per-Call Account Code	*71

## 8.11 Site Service – Music on Hold

You can use this menu to modify the Music on Hold for the group and departments, or to delete Music on Hold for a department.

Tasks	Steps
Select a Group/Department to modify from the drop-down menu.	
<b>To enable Music On Hold:</b>	<p>Check the <b>Enable Music during Call Hold</b> box to play the Music On Hold message for held callers.</p> <p>Check the <b>Enable Music during Call Park</b> box to play the Music On Hold message for parked callers.</p>
<b>To change the Music On Hold Message:</b>	<p>Select the type of message to play:</p> <ul style="list-style-type: none"> <li>To play the default music selection click <b>System</b>.</li> <li>To play music from a custom file click <b>Custom</b>. <ul style="list-style-type: none"> <li>Select a Custom music file from the drop-down menu.</li> </ul> </li> </ul>
<b>To delete Music On Hold for a department:</b>	<p>Click <b>Delete</b>.</p> <p>Deleting Music On Hold for a department disables the service and deletes the department's Music On Hold configuration.</p>

**NOTE:** Only a group administrator can delete Music On Hold for a department. The **Delete** button does not appear for department administrators.

Save your changes or exit without saving.

To save your changes, click **Save**.

## 8.12 Site Services – Virtual On-Net Enterprise Extensions

This page is used to add, edit, or delete Virtual On-Net users in your group.

Virtual On-Net users are external users who have been assigned an extension so authorized users may call them using an extension. A Virtual On-Net user has a calling line ID, first and last name, a Unicode first and last name (used for web presentation purposes), a telephone number in E.164 format, as well as an extension number, and it's associated with a Virtual On-Net type for the purpose of differentiated billing.

This page contains a table which provides an advanced search mechanism to filter and sort the display of entries using the column headers.

Tasks	Steps
To search for a specific user(s):	Enter the search criteria in the filter controls located in the header columns of the Virtual On-Net users table.
To add a Virtual On-Net user:	Click <b>Add</b> .
To add a range of Virtual On-Net users:	Click <b>Add Range</b> .
To edit an existing Virtual On-Net user entry:	Click <b>Edit</b> .
To delete a Virtual On-Net user entry:	Select the users you want to delete and click <b>Delete</b> .

### 8.12.1 Adding a Virtual On-Net User

Use the Virtual On-Net User Add pop-up to configure individual external users as virtual on-net users in your group. The authorized users in your group may then call Virtual On-Net users using their extension.

Steps	Details
1. Specify the last and first name (used for display purposes).	In the <b>Last Name</b> and <b>First Name</b> fields, enter the user's last and first name as you want them to appear in the phone listings.
2. Specify the user's Calling Line ID last and first name.	In the <b>Calling Line ID Last Name</b> and <b>Calling Line ID First Name</b> fields, enter the user's last and first name to be used as their Calling Line Identification.
3. Enter the user's phone number.	In the <b>Phone Number</b> field, type the user's phone number.
4. Enter the user's extension.	In the <b>Extension</b> field, enter the extension you want to assign to the user. The extension must be unique within the group.
5. Assign a Virtual On-Net type.	From the <b>Virtual On-Net Type</b> drop-down list, select the type to assign to this user for billing purposes.
6. Save your changes or exit without saving.	Click <b>Save</b> to save your changes.

To exit without saving, click **Cancel** to display the previous page.

### 8.12.2 Adding a Virtual On-Net User Range Add

Use the Virtual On-Net User Range Add pop-up to configure a range of Virtual On-Net users in your group. You may assign a single name and virtual on-net type to the range and may subsequently use the Virtual On-Net User Edit pop-up to modify individual entries.

The authorized users in the group may call Virtual On-Net users using their extension.

Steps	Details
1. Specify the last and first name for the range (used for display purposes).	In the <b>Last Name</b> and <b>First Name</b> fields type the last name and first name for the range.
2. Specify the Calling Line ID last and first name for the range.	In the <b>Calling Line ID Last Name</b> and <b>Calling Line ID First Name</b> fields, type the last and first name to be used as the Calling Line Identification for the range.
3. Enter the phone number range.	In the <b>Phone Number Range</b> fields, type the first and last phone number of a continuous range of numbers.
4. Enter the user's extension.	In the <b>Extension Range</b> fields, type the first and last extension or the corresponding extension range you want to assign to the range. The extensions have to be unique within the group.
5. Assign a Virtual On-Net type.	From the <b>Virtual On-Net Type</b> drop-down list, select the type you want to assign to the range for billing purposes.
6. Save your changes or exit without saving.	Click <b>Save</b> to save your changes. To exit without saving, click <b>Cancel</b> to display the previous page.

### 8.12.3 Virtual On-Net User Modify

Use the Virtual On-Net User Edit pop-up to modify Virtual On-Net user entries.

Tasks	Steps
To modify a Virtual On-Net user entry:	<ol style="list-style-type: none"> <li>1. Enter or select information as required.</li> <li>2. Click <b>Save</b> to save your changes.</li> </ol> <p>To exit without saving, click <b>Cancel</b> to display the previous page.</p>

### 8.12.4 Virtual On-Net Users Delete

Tasks	Steps
To delete Virtual On-Net Users entries:	<ol style="list-style-type: none"> <li>1. Check the box in the rows for Virtual On-Net users you want to delete.</li> <li>2. Click <b>Delete</b>.</li> <li>3. On the confirm dialog, click <b>Delete</b> to delete the selected Virtual On-Net users.</li> </ol> <p>To exit without deleting Virtual On-Net users, click <b>Cancel</b> to display the previous page.</p>

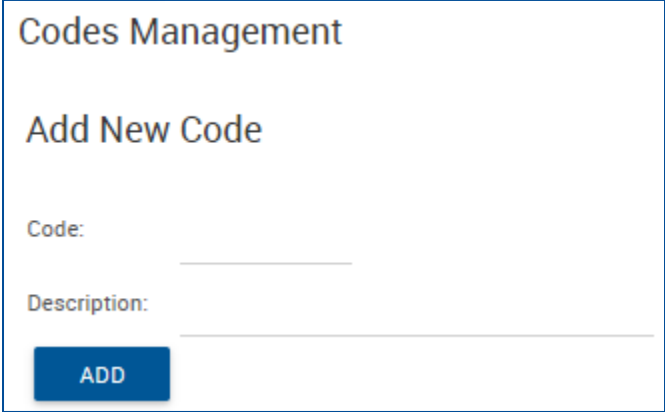
## 8.13 Calling Plans – Calling Plans

Calling Plans define what kind of incoming and outgoing calls are permitted for the group. Incoming Calling Plan controls the phone calls being received by the group. Outgoing Calling Plan affects the calls made by the group.

### 8.13.1 Codes Management

This section allows you to create authorization codes which are used for outgoing calls, as specified in the Outgoing Calling Plan. The authorization codes are specified on a group and/or department basis. Select the group or department you'd like to manage.

Add a new code by typing the code into the **Code** text box and a description for the code in the **Description** text box. Click **Add** to save changes.

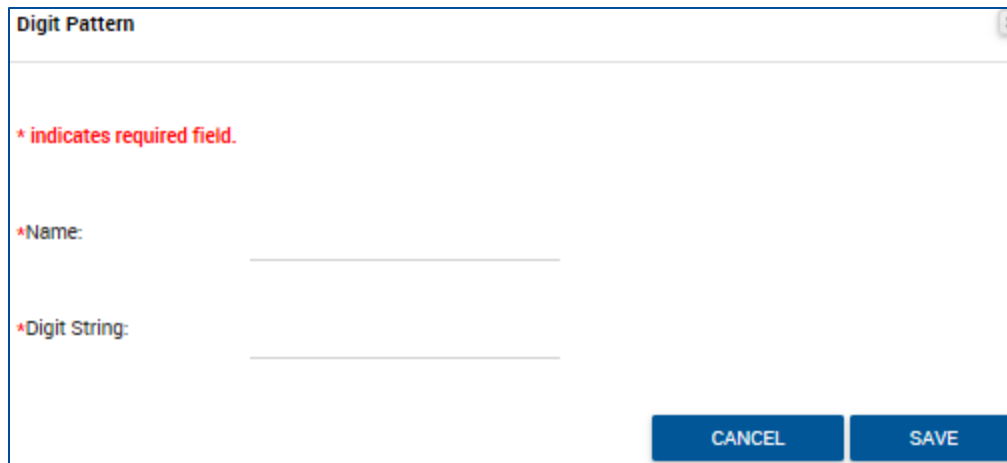


The screenshot shows a web interface titled "Codes Management". Below the title is a section header "Add New Code". There are two input fields: "Code:" and "Description:". The "Code:" field has a text input box. The "Description:" field has a text input box. Below the input fields is a blue button labeled "ADD".

### 8.13.2 Digit Strings

This section allows you to add, view, edit, and delete Digit Strings that are used for call screening in the Outgoing and Incoming Calling Plans.

Click the **Add** button to add a new digit string. The Digit Pattern box pops up. Enter the **Name** and a **Digit String** then click **Save** to keep changes.



Digit Pattern

\* indicates required field.

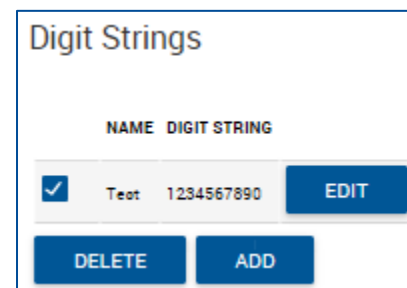
\*Name: \_\_\_\_\_

\*Digit String: \_\_\_\_\_

CANCEL SAVE

Delete a Digit String by clicking in the checkbox for the string you wish to remove then click **Delete**.

Edit a Digit String by clicking in the checkbox for the string you wish to edit then click **Edit**.

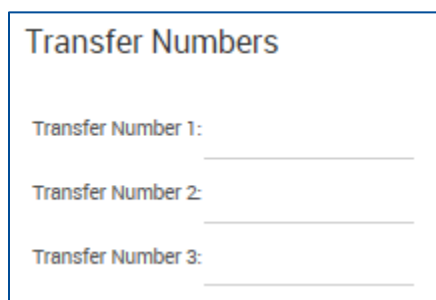


	NAME	DIGIT STRING	
<input checked="" type="checkbox"/>	Test	1234567890	EDIT
DELETE		ADD	

### 8.13.3 Transfer Numbers

Transfer Numbers are used when a caller makes an outgoing call that requires operator assistance as defined in the Outgoing Plan.

Enter the numbers in the available Transfer Number text boxes. Click **Save** at the bottom of the page to keep your changes.



Transfer Numbers

Transfer Number 1: \_\_\_\_\_

Transfer Number 2: \_\_\_\_\_

Transfer Number 3: \_\_\_\_\_

### 8.13.4 Incoming Calling Plan

This section enables you to restrict incoming calls to the group or to departments within the group. You may prevent the following types of calls: **Calls From Within Group/Enterprise, Calls From Outside Group/Enterprise, Collect Calls**, and types presented by custom digit strings the system matches against outside numbers.

This section lists all departments within the group. If the group is a part of an enterprise, the list also includes all enterprise-level departments created by an enterprise administrator. If you choose to modify the settings for an enterprise-level department, your changes will only apply to users in the department that exist within your group.

In Enterprise scenarios, the **Calls from within the group** and **Calls from outside the group** screening criteria refer only to calls from outside the Enterprise. Calls from outside the group but within the same enterprise do not trigger the **Calls from within the group** and **Calls from outside the group** screening criteria.

**Note:** **Custom Settings** box in the Incoming Call Plan section affects the Incoming Calling Plan only.

The following tasks will assist you with configuring your Incoming Calling Plan settings:

Tasks	Steps
To change incoming call privileges for a user:	<p>Check the <b>Custom Settings</b> box to give the user different privileges from their department or group. The page will enable the check boxes in the <b>Permitted</b> column.</p> <p>In the <b>Calls From Within Group</b> and <b>Collect Calls</b> columns, and any other columns representing digit string numbers, check or uncheck the check box to allow or prevent the corresponding call type for the group or department represented by the row.</p> <p>In the <b>Calls From Outside Group</b> column, choose one of these settings:</p> <ul style="list-style-type: none"> <li>• <b>Allow:</b> Allows users in the group or department to receive all calls from outside the group</li> <li>• <b>Partial:</b> Allows users in the group or department to receive calls from outside the group only if the outside calls are transferred or forwarded by other users inside the group.</li> <li>• <b>Block:</b> Prevents users in the group or department from receiving any calls from outside the group, even if the outside calls have been transferred or forwarded by other users inside the group.</li> </ul> <p><b>NOTE:</b> Fully restricted users (“Block” in <b>Calls From Outside Group</b> column) cannot pick up outside calls in their call pickup group or outside calls parked by a user in their group. Fully restricted users can receive calls from City-Wide Centrex (CWC) users when both are in the same CWC group.</p>
To save changes:	Click <b>Save</b> .

### Incoming Calling Plan

Calls From Within Group: ☒

Calls From Outside Group: Allow

Collect Calls: ☒

Test (1234567890): ☒

### 8.13.5 Outgoing Calling Plan

This section defines outgoing calling privileges for users in your group or departments. These privileges may be refined using the Outgoing Digit Plan (ODP) and Outgoing Pinhole Digit Plan (OPDP).

Use the Originating section to define the types of calls that the users may make. This menu lists all departments in your group. If your group is part of an enterprise, the list includes all enterprise-level groups created by an enterprise administrator. If you choose to modify the settings for an enterprise-level department, your changes will only apply to users in the department which exists within your group.

**Note:** You may change data only for a user with a checked **Custom Settings** box.

- To change the types of calls this user can forward or transfer, click the **Initiating Call Forwards/Transfers** tab (or the **Initiating Call Forwards** tab).
- To allow or prevent intra-group calls from this user from being forwarded or transferred outside the group by another user in the same group, click the **Being Forwarded/Transferred** tab.

Allow or prevent intra-group calls from an individual user from being forwarded or transferred outside the group by another user within the same group by following the steps below.

Steps	Details
1. Make the user settings editable.	Click the <b>Custom Settings</b> check box for the <b>Outgoing Plan</b> section.
2. Change setting for calls Being Forwarded/Transferred Outside Group.	Check box to Allow intra-group call from an individual user from being forwarded or transferred outside the group by another user in the group. Uncheck to Block.



<p>3. Change the Originating Calls privileges for this user.</p>	<p>Select "Y", "N", "A", or "TX".          "Y" or "N" means the user can or cannot make that type of outgoing call. "A" means the user must enter an authorization code to make that type of outgoing call. "TX" (where X = 1, 2, or 3) means that the user is transferred to the specified transfer number upon attempting to make that type of outgoing call. A definition of each call type is provided below:</p> <ul style="list-style-type: none"> <li>• <b>Group:</b> Calls from within the user's business group.</li> <li>• <b>Local:</b> Calls within the same geographic region.</li> <li>• <b>Toll Free:</b> Free calls to numbers being with the country code (for example, 1), usually followed by 800, 877, or 888.</li> <li>• <b>Toll:</b> Chargeable calls within the same geographic region.</li> <li>• <b>International:</b> Chargeable calls to other countries assistance of an operator. (See note below Figure 144)</li> <li>• <b>Chargeable Directory Assistance:</b> Chargeable calls made to Directory Assistance, such as 411 or 555-1212.</li> <li>• <b>Special Services I:</b> Calls to 700 numbers. These calls may or may not be chargeable.</li> <li>• <b>Special Services II:</b> (Reserved for system administrator's discretion.)</li> <li>• <b>Premium Services I:</b> Chargeable calls to 900 numbers.</li> <li>• <b>Premium Services II:</b> Chargeable calls to 976 numbers.</li> <li>• <b>Casual:</b> 1010XXX chargeable calls, such as 1010321.</li> <li>• <b>URL Dialing:</b> Calls made to URLs, which are outside the group (for example, to an e-mail address outside the group).</li> <li>• <b>Unknown:</b> Calls to unknown call types.</li> </ul>
<p>4. Change the Initiating Call Forwards/Transfers privileges for this user.</p>	<p>A check mark in the Initiating Call Forwards/Transfers column indicates that the call type is allowed.</p>
<p>5. Save your changes or exit without saving.</p>	<p>Click <b>Save</b>.</p>

## Outgoing Calling Plan

Being Forwarded / Transferred Outside Group: ☒

CALL TYPE	ORIGINATING	INITIATING CALL FORWARDS / TRANSFERS	DESCRIPTION
Group	Y ▾	<input checked="" type="checkbox"/>	Calls within the business group
Local	Y ▾	<input checked="" type="checkbox"/>	Calls within the local calling area
Toll Free	Y ▾	<input checked="" type="checkbox"/>	Calls made to toll free numbers
Toll	Y ▾	<input checked="" type="checkbox"/>	Local toll calls
International	Y ▾	<input checked="" type="checkbox"/>	International calls
Operator Assisted	Y ▾	<input checked="" type="checkbox"/>	Calls made with the chargeable assistance of an operator
Chargeable Directory Assistance	Y ▾	<input checked="" type="checkbox"/>	Directory assistance calls
Special Services I	Y ▾	<input checked="" type="checkbox"/>	Special Services I (700 Number) calls
Special Services II	Y ▾	<input checked="" type="checkbox"/>	Special Services II
Premium Services I	N ▾	<input type="checkbox"/>	Premium Services I (900 Number) calls
Premium Services II	N ▾	<input type="checkbox"/>	Premium Services II (976 Number) calls
Casual	N ▾	<input type="checkbox"/>	1010XXX chargeable calls. Example: 1010321
URL Dialing	Y ▾	<input checked="" type="checkbox"/>	Calls from internet
Unknown	Y ▾	<input checked="" type="checkbox"/>	Unknown call type
Test (1234567890)	Y ▾	<input checked="" type="checkbox"/>	Test

**Note:** If international calling is enabled (set to **Y**) an administrator may disable international calling by setting the option to N. If international calling is already disabled (set to **N**) the feature may only be enabled by contacting a business relations representative at 419-724-9898 to submit the request to Telesystem to enable this feature.

## 8.14 Calling Plans – Account/Auth Codes

The Account/Auth Codes page is used to configure account and authorization codes for a group.

### 8.14.1 Administration

Using account codes enables the tracking of calls made outside the group by prompting users for an account code. However, codes are not validated.

Authorization codes are used to perform authorization of calls made outside the group by prompting users for an authorization code. Calls are not connected unless a valid code is entered.

Use this section to determine whether account or authorization codes are required for users in your group, and to select the users who must provide codes with their outgoing calls.

This page includes an advanced search mechanism to filter the display of entries. To perform a basic search, click **Search** and the list appears.

Steps	Details
1. Select a mode for the account and authorization code service.	<p>Click the desired option:</p> <ul style="list-style-type: none"><li>• <b>Account Code:</b> Tracks outgoing calls against account codes, and includes the account codes in billing reports. The system checks that codes provided by users contain the required number of digits, but does not validate codes against the list you create.</li><li>• <b>Authorization Code:</b> Allows users to make calls only after providing valid, pre-defined authorization codes. This service does not override any restrictions set in the Outgoing Calling Plan of the user, their department, or the group.</li><li>• <b>Deactivated:</b> The system does not collect account codes or authorization codes. This is the default setting.</li></ul>
2. Specify the number of digits to collect.	Select the length of the codes to be used by your group from the <b>Number of Digits</b> drop-down list box.
3. Allow or prevent local and toll-free calls without account or authorization codes.	Check or uncheck the <b>Allow Local and Toll-Free Calls without Account/Authorization Code</b> box.
4. Search for users to restrict.	Use the search bar provided to find the desired users. You may search for users by <b>Last Name</b> , <b>First Name</b> , or <b>Department</b> . Search results are listed in the <b>Non-Restricted Users</b> column.

**5. Restrict the desired users.****For account codes:**

Restricting users moves their names from the **Non-Restricted Users** column to either the **Mandatory Usage** or **Option (FAC-based) Usage** boxes in the **Restricted Users** column.

Users listed in the **Mandatory Usage** box will be prompted for an account code for every outgoing call.

Users listed in the **Optional (FAC-based) Usage** box are not prompted automatically for an account code, but may dial a specified feature access code (FAC) to supply an account code for the current call. Calls without account codes proceed normally.

You may restrict users in two ways:

1. To restrict all users listed in the **Non-Restricted Users** column to either the **Mandatory Usage** or **Option (FAC-based) Usage** box, click **Add All** next to the target box.
2. To restrict one or more users in the **Non-Restricted Users** column to either the **Mandatory Usage** or **Optional (FAC-based) Usage** box, select the desired names and click **Add** next to the target box. To select a single user, click the desired name in the list. To select multiple users, hold the **CTRL** key and click the desired names. To select a range of names, click the first name, press the **SHIFT** key, click the last name, and then release the **SHIFT** key.

**For authorization codes:**

Restricting users moves their names from the **Non-Restricted Users** column to the **Restricted Users** column.

You may restrict users in two ways:

1. To restrict all users listed in the **Non-Restricted Users** column, click **Add All**.
2. To restrict one or more users in the **Non-Restricted Users** column, select the desired names and click **Add**.

To select a single user, click the desired name in the list. To select multiple users, hold the **CTRL** key and click the desired names. To select a range of names, click the first name, press the **SHIFT** key, click the last name, and then release the **SHIFT** key.

**6. Save your changes or exit without saving.**

To save your changes, click **Save**.

### Administration

Type: ☐ Account Code ☐ Authorization Code ☒ Deactivated

Number of Digits: 6 ▾

☐ Allow Local and Toll-Free Calls without Account/Authorization Code

Department:  
Any ▾

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ **SEARCH**

Non-restricted Users		Restricted Users
		Michaels, Bridgette (4199442073) Stevens, Amy (4199442072) Smith, Jamie (4199442070)
	<b>ADD &gt;</b>	
	<b>&lt; REMOVE</b>	
	<b>ADD ALL &gt;&gt;</b>	
	<b>&lt;&lt; REMOVE ALL</b>	
<b>SAVE</b>		

### 8.14.2 Codes Management

Use this section to display codes for the Account Code or Authorization Code service. The code and description appear for each code. The service does not allow you to change an account or authorization code; instead you must delete it then add another one.

The following procedure shows you how to add a code:

Steps	Details
1. Type the code.	Type the code in the <b>Account/Authorization Code</b> text box. Enter a code that meets the restrictions for the number of digits on the <b>Account/Authorization Codes – Administration</b> page. When the Account Code is selected on the <b>Account/Authorization Codes – Administration page</b> , the codes entered appear on the user's <b>Account Codes</b> page. Authorization codes do not appear to users.
2. Type a description.	Add text to help administrators identify the code.
3. Bulk update	To add bulk Auth Codes – Click <b>Browse</b> to select a file and use your local file system to locate and upload that file.
4. First row contains column headers:	If the first row of the CSV you are uploading is just a header, select this to ignore the first row.
5. Save your changes or exit without saving.	Click <b>Save</b> .

## Codes Management

### Add New Code

Code:

Description:

ADD

☐

CODE DESCRIPTION

☐

205377Research

DELETE

## 8.15 Group Services – Feature Access Codes (FAC)

The FAC menu lists the Feature Access Codes (FAC) that may be available for the group services. These are codes which may be dialed on a telephone key pad to modify available features assigned to the group services. Feature Access Codes may vary from group to group depending on the plans and features assigned to each group.

## 9 Utilities

The Utilities tab provides access to the Inventory Report menu.

### 9.1 Policies

The Policies page is used as a read-only access to the group policies.

### 9.2 Inventory report

The Inventory Report provides the ability to generate a report on the resources used within the group.

The report is generated in ASCII Comma Separated Version (CSV) format. The generated report is sent to the e-mail address provided on the **Inventory Report** page as an ASCII attachment file and is displayed in a separate window in ASCII CSV format.

Steps	Details
1. Select report options.	Check one or more of the <b>Report Generation Criteria</b> boxes for data to be included in the report.
2. Specify an e-mail address.	Specify a valid e-mail address in the box provided.
3. Generate the report or exit without generating a report.	Click <b>Send</b> . The report is sent as an attachment to the e-mail address you entered.  To exit without generating a report, select another page.

### Report Generation Criteria

☒ User

☒ Service

☒ Phone Number

☒ Device

☒ Department

\* Send report to this e-mail address:

SEND

Here

## 10 Directory

The Directory tab contains menus for accessing and managing the various directories available to a group administrator.

The following menus are available in the Directory tab:

- Common Phone List
- Personal Phone List
- Enterprise Directory
- Custom Contact Directories

### 10.1 Common Phone List

The Common Phone List is useful for including numbers frequently called by the group, such as a security company, company caterer, or a company day care center.

From this page you may:

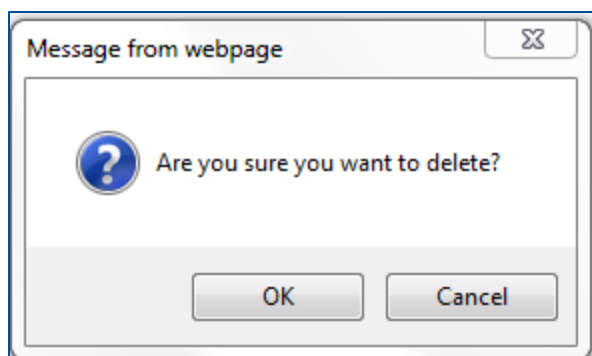
- Delete a number
- Add a number
- Import a file of numbers
- Modify or delete a number

The Common Phone List is used as an available directory in Hosted VoIP Phone System Applications such as Receptionist and Call Center.

#### 10.1.1 Deleting a Number

To delete a number from the Common Phone List, click the Delete button in the row associated with that number for the table.

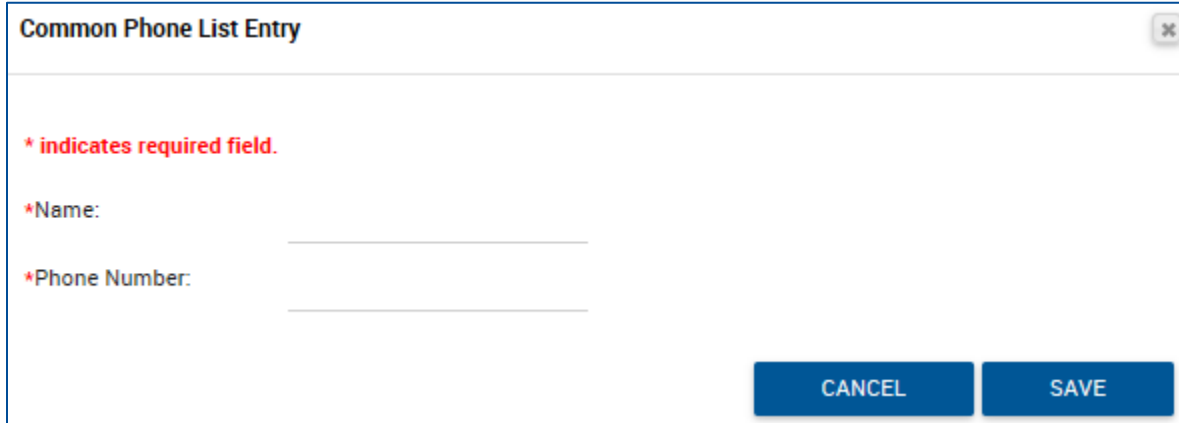
A message from the webpage will require you to confirm that you wish to delete the number. Click **OK** to proceed or **Cancel** to keep the number in the Common Phone List.





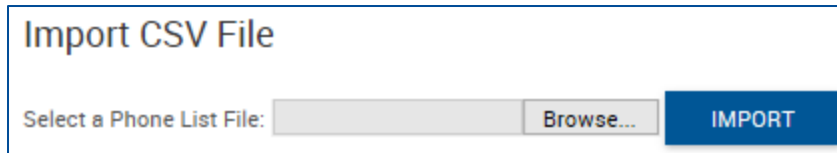
### 10.1.2 Adding a Number

To add a number to the Common Phone List, click on the **Add** button. You'll be presented with the **Common Phone List Entry** window. Enter a **Name** and **Phone Number** for the entry in the fields provided then click **Save**.

A screenshot of the 'Common Phone List Entry' window. It has a title bar with the text 'Common Phone List Entry' and a close button. Below the title bar, there is a red asterisk followed by the text '\* indicates required field.' Below this, there are two labels: '\*Name:' and '\*Phone Number:'. Each label is followed by a text input field. At the bottom right of the window, there are two buttons: 'CANCEL' and 'SAVE'.

### 10.1.3 Import CSV File

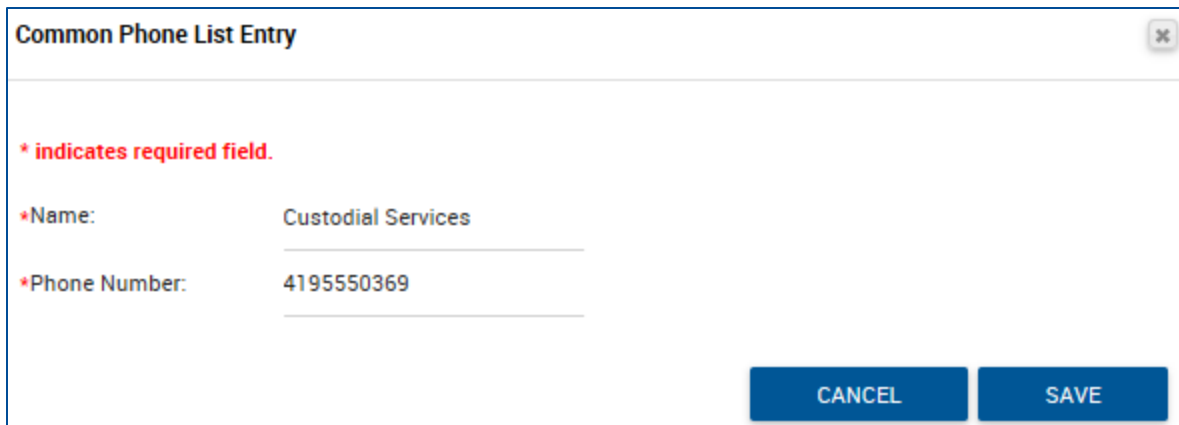
The system does provide you with the ability to import a Phone List File in a CSV (Comma Separated Value) format to add numbers to the Common Phone List. To do this, locate the **Import CSV File** section and click on the **Browse...** button. Locate the locally saved file and open it. Click **Import** to complete the process.

A screenshot of the 'Import CSV File' dialog. It has a title bar with the text 'Import CSV File'. Below the title bar, there is a label 'Select a Phone List File:' followed by a text input field. To the right of the input field is a button labeled 'Browse...'. To the right of the 'Browse...' button is a button labeled 'IMPORT'.

### 10.1.4 Edit a Phone Number

To edit a number, click the **Edit** button in the row of the phone number you wish to modify.

The **Common Phone List Entry** window will open with the current information. Click in the text boxes you wish to modify and make your changes. Click **Save** to keep your changes or **Cancel** to discard your changes.

A screenshot of the 'Common Phone List Entry' window, similar to the one in the previous section but with pre-filled data. The title bar shows 'Common Phone List Entry'. Below the title bar, there is a red asterisk followed by the text '\* indicates required field.' Below this, there are two labels: '\*Name:' and '\*Phone Number:'. The '\*Name:' label is followed by a text input field containing the text 'Custodial Services'. The '\*Phone Number:' label is followed by a text input field containing the text '4195550369'. At the bottom right of the window, there are two buttons: 'CANCEL' and 'SAVE'.

## 10.2 Personal Phone List

The Personal Phone List will provide group administrators with the ability to view, edit, and delete numbers that users within the group have added to their Personal Phone Lists.

The list displays the User ID of the user that made the entry as well as the name and phone number they used for that entry.

Clicking on the **Edit** button will allow you to change the name or phone number. Click **Save** to keep your changes or **Cancel** to discard your changes.

## 10.3 Enterprise Directory

The Enterprise directory menu provides you with a data table of the entire enterprise directory. The directory displays the following information regarding each user or group where applicable:

- Name
- Number
- Extension
- Mobile (phone number)
- Email Address
- Department
- Group ID
- Yahoo ID

You may search for a specific entry in the directory using the available search fields. Entries may be searched for by Last Name, First Name, or Phone Number. Search results may be expanded or narrowed using the drop-down menu with the options: **Starts With**, **Contains**, and **Equal To**.

From this menu, you also have the links available to view the Enterprise Directory Summary as a separate web page or download it as a PDF.

Utilities

ENTERPRISE DIRECTORY DOCUMENT REPOSITORY REGISTRATIONS FEATURE ACCESS CODES

Enterprise Directory

[Enterprise Directory Summary](#) [Enterprise Directory Detail](#)  
[Enterprise Directory Summary - PDF](#) [Enterprise Directory Detail - PDF](#)

Last Name  Starts With

NAME	NUMBER	EXTENSION	MOBILE	EMAIL ADDRESS	DEPARTMENT	GROUP ID	YAHOO ID
BMG Hunt Group (Hunt Group)	4199442075	2075			Marketing (Marketing)	Marketing	
Burgers, Johnny's	+1-4195555555	5555				Marketing	

## 10.4 Custom Contact Directories

You may use this menu to create a new custom contact directory and manage existing custom contact directories. The directory may contain a maximum of 1,000 users. The custom contact directories may be read by all users within the group.

Users may not be included in the custom contact directory if they have the User Privacy service assigned and have the directory privacy option enabled.

### 10.4.1 Adding a New Directory

To add a new Custom Contact Directory, click on the Add New Directory button. The Create and manage custom contact directories menu will populate. Follow the steps below to configure the new custom directory:

Steps	Details
1. Specify a custom contact directory name.	<p>In the <b>Directory Name</b> text box, type the name of the directory. This is a required field.</p> <p><b>To add users:</b></p> <p>To select users to add to the directory, move users from the <b>Available Users</b> column to the <b>Assigned Users</b> column.</p> <p>In the <b>Available Users</b> column, select the users. You may select some or all of the items in a column. Item names are listed in alphabetical order. To select several items in sequential order, click the first item, hold down the <b>SHIFT</b> key on the keyboard, and click the last item. To select several items, but not in a particular order, click the items while holding down the <b>CTRL</b> key on the keyboard.</p>
2. Select the users to be added to the directory by adding them to the Assigned Users column.	<p><b>To add the selected users:</b></p> <p>Click <b>Add</b>. To select all users (unselected) at once, click <b>Add All</b>.</p> <p><b>To remove users:</b></p> <p>To de-select users, you move users from the <b>Assigned Users</b> column to the <b>Available Users</b> column.</p> <p>In the <b>Assigned Users</b> column, select the users.</p> <p>To de-select the selected users, click <b>Remove</b>. To de-select all users (unselected) at once, click <b>Remove All</b>.</p> <p><b>NOTE:</b> The Add and Add All buttons always move items from a column on the left to a column on the right. The <b>Remove</b> and <b>Remove All</b> buttons always move items from a column on the right to a column on the left.</p>
3. Save your changes.	<p>Click <b>OK</b>.</p> <p>To exit without saving, select another page or click <b>Cancel</b>.</p>

## 11 Disaster Redirect

Disaster Redirect allows group administrators to update the forwarding destination for the **Call Forward Not Reachable** destination which invokes when the link to your location is down for each user.

**Note:** This is only available for users with the Call Forward Not Reachable service assigned.

To edit the redirect number, click in the field under **Redirect number** column for the associated user you wish to edit. Type the number in the field, delete the current number, or edit the number currently entered, then click **Save** to keep your changes.

Disaster Redirect

USER ID	NAME	NUMBER	REDIRECT NUMBER
4199442070	Smith, Jamie	+1-4199442070	
4199442071	Dixon, Jay	+1-4199442071	
4199442072	Stevens, Amy	+1-4199442072	4197249898
4199442073	Michaels, Bridgette	+1-4199442073	
4199442074	Snow, Jonathon	+1-4199442074	

SAVE

## 12 Call Details

The Call Details tab provides the ability to Query Call Details and to obtain the Call Detail Records (CDRs) for the group.

### 12.1 Query Call Details – Report

The **Sort by** option allows you to select specific criteria to generate your report.

The following options are available when sorting:

- Start date/time
- Answer time
- Release date/time
- Call duration
- User phone
- From phone
- To phone
- Call type
  - Call result
  - Call category

Each of these may be sorted in descending or ascending order.

The **Date range** allows calendar dates to be selected for the period of time you would like your results to include. Date range is formatted in the following format: MM/DD/YYYY. You may click the calendar icon next to each text box and select a date by clicking on it within the pop-up calendar.

You have the option to indicate the types of calls you'd like to include in the query. The following options are available:

- Inbound calls
- Missed calls
- Outbound calls

Include: ☒ Inbound calls ☐ Missed calls ☒ Outbound calls

Check or uncheck the box preceding the option desired.

You have the option to only return results for a specific phone number or partial phone number. If you only want to see calls made to 419-724-9898, type 4197249898 in the field labeled **Search by full or partial telephone number**.

Search by full or  
partial telephone number: 4197249898

**Note:** When searching for a number, do not add dashes, periods, or spaces. Enter the ten digit phone number and perform the search. The output will match the search results exactly.

If you want to search for calls made to the 734 area code, you may type 734 into the same box.

**Note:** Anytime the string 734 shows up in your call history, it will return the result. For example, a search for **734** will return 4195550734 as well as 7345551212.

Search by full or  
partial telephone number: 734

The **Create Report** button will cause the query to run based on the criteria you have entered. The date will display at the bottom of the page in HTML format.

INDEX	ENTERPRISE	GROUP	DEPARTMENT	ACCOUNT CODE	USER ID	PHONE NUMBER	CALL TYPE	CALLING NUMBER	CALLED NUMBER	CALLER NAME	CALL DATE	CALL TIME	ANSWER DATE/TIME	RELEASE DATE/TIME	CALL DIRECTION	CALL DURATION	ANSWER INDICATOR	CALL CATEGORY	SPECIAL CALL TYPE
1	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal	+14197243718	+14199442077	Telesystem	10/27/2016	03:07 PM	10/27/2016 03:07 PM	10/27/2016 03:08 PM	Terminating	00:00:12	Yes		
2	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal	+14197243718	+14199442077	Telesystem	10/27/2016	03:07 PM	10/27/2016 03:07 PM	10/27/2016 03:07 PM	Terminating	00:00:12	Yes		
3	MarketingGroup (Marketing)	Marketing Lab (Marketing)			4199442077CC@combuckeye.com	+14199442077	Normal	+14197243718	+14199442077	Telesystem	10/27/2016	03:07 PM	10/27/2016 03:07 PM	10/27/2016 03:07 PM	Terminating	00:00:18	Yes		

The end result will contain the following information:

**Index**  
**Enterprise**  
**Group**  
**Department**  
**Account Code**  
**User ID**  
**Phone Number**  
**Call Type**  
**Calling Number**

**The index will identify which row of data you are displaying.**

Indicates what Enterprise within organization the User ID is assigned to.

Indicates what Group of the Enterprise hierarchy the User ID is assigned to.

Indicates what Department of the Group hierarchy the User ID is assigned to.

Unsupported field

The User ID is your phone number set as a fully qualified domain name. Example 4195551212@combuckeye.com

Your phone number with the +1 prefix. For example +14195551212

Displays **Normal**.

This will display the phone number party that originated the call. The format will display the same as the **Phone Number** field.

<b>Called Number</b>	This will display the phone number of the party that received the call. The format will display the same as the <b>Phone Number</b> field.
<b>Caller Name</b>	This will display the caller ID name of the party you are speaking with if that caller is part of your Enterprise Directory.
<b>Call Date</b>	Displays the date of the call. The date is displayed in MM/DD/YYYY format.
<b>Call Time</b>	Displays the time of the call. The time is displayed in a 12-hour format with a leading 0 for single digit hours. AM and PM is not specified.
<b>Answer Date/Time</b>	Displays the date when the call was initially answered with the time for when the call was answered. This information will only display if the receiving party actually answers the phone. Unanswered calls will not display a result. The date and time follow the same formatting as the <b>Call Date</b> and <b>Call Time</b> .
<b>Release Date/Time</b>	This displays the time when the call was terminated. An unanswered call will display a release date and time. The date and time follow the same formatting as the <b>Call Date</b> and <b>Call Time</b> .
<b>Call Direction</b>	Indicates if the call is <b>Originating</b> (outgoing) or <b>Terminating</b> (incoming) from your perspective.
<b>Call Duration</b>	Displays the amount of time you participated in the call. This is shown in HH:MM:SS format.
<b>Answer Indicator</b>	Indicates if the call was answered with a <b>Yes</b> or <b>No</b> , or if the call went to voicemail ( <b>Yes – Post Redirection</b> ).
<b>Call Category</b>	Values such as: <b>Interlata, intralata, local, other, private</b>
<b>Special Call Type</b>	Indicates if a call feature was used in order to handle this call.

**Note:** The HTML output is only capable of displaying 500 entries. If your report criterion exceeds 500 entries it is advised that you use the **Export** options available below or narrow your date range.

## 12.2 Query Call Details – Export

You have the option to export data via three methods:

- Email
- PDF
- CSV

The **Email to** option provides a user with the ability to select report criteria then specify an email address to which the report details will be sent to.

Export

Email to:

After you enter the email address, click **Submit**. A notification will display to the right of the Submit button that the report is being generated and then a notice that will indicate the email sent.

If there is a problem with the email address in the **Email to** field, you will see a message that states **Please provide valid email**. The email address must follow the standard format such as: example@email.com.

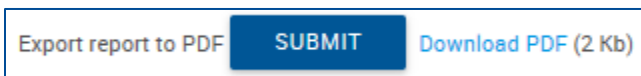
### 12.2.1 Export – Export to PDF

Using the **Export report to PDF** option will allow you to set the criteria and then generate the report with a PDF layout. This option is ideal if you're interested in a report that provides all of the included data in an easy to read PDF document. The data cannot be manipulated and the document can be shared and read by any device with a PDF reader.

To export to PDF, set the desired report criteria then click the **Submit** button next to **Export report to PDF**.



Once you click on the download link, you will be presented with your browser's default download options which will determine where the file is saved to your local computer.



**Note:** Additional software may be required to view the downloaded file. Please contact your system administrator for assistance.

### 12.2.2 Export – Export to CSV

Using the **Export to CSV** option will allow you to generate a report and receive the output in a CSV (Comma Separated Value) format. The CSV format allows users to access the data in a spreadsheet editor such as Microsoft Excel®. From there, unnecessary data can be removed or additional data can be added. Users may sort the data from within the application or import the data to a database and manage it from software such as Microsoft Access®.

To export a report to CSV, set the desired report criteria then click the **Submit** button next to **Export report to CSV**.



You will immediately see a notification that the system is preparing the report followed by a download link and the file size.



Once you click on the download link, you will be presented with your browser's default download options which will determine where the file is saved to your local computer.

**Note:** Additional software may be required to view and edit the downloaded file. Please contact your system administrator for assistance.